

## Importing a batch of records:

- To start: From the “Cataloging” menu, select “MARC Batch Import/Export”. Use the screenshot below as a guide for the instructions that follow:

The screenshot shows the 'MARC File Upload' interface. At the top, there are navigation tabs: 'Export', 'Import' (highlighted in blue), 'Inspect Queue', 'Record Display Attributes', 'Merge / Overlay Profiles', 'Record Match Sets', 'Holdings Import Profiles', and 'Recent Imports'. Below the tabs, the 'MARC File Upload' section contains various form fields and buttons. Annotations 'a' through 'i' are placed on the interface to indicate specific steps:

- a**: Points to the 'Record Type' dropdown menu, which is currently set to 'Bibliographic Records'.
- b**: Points to the 'Select or Create a Queue' dropdown menu, which is currently empty.
- c**: Points to the 'Record Match Set' dropdown menu, which is currently set to 'Match Set...'.
- d**: Points to the 'Holdings Import Profile' dropdown menu, which is currently empty.
- e**: Points to the 'Merge Profile' dropdown menu, which is currently set to 'Merge Profile...'.
- f**: Points to the 'Select a Record Source' dropdown menu, which is currently set to 'oclc'.
- g**: Points to three checkboxes: 'Import Non-Matching Records', 'Merge On Single Match', and 'Merge On Best Match', all of which are currently unchecked.
- h**: Points to the 'Choose File' button next to the 'File to Upload' field, which currently shows 'No file chosen'.
- i**: Points to the green 'Upload' button at the bottom of the form.

- At the dropdown box next to “Record Type”, select “Bibliographic Records”
- Next to “Select or Create a Queue”, type in a unique queue name
- At the dropdown box next to “Record Match Set”, select “ISBN”
- If your batch of records has attached holdings: at the dropdown box next to “Holdings Import Profile”, select “Evergreen 852 import and export format”. (Note: before you do this, contact SPARK Tech Support to configure “Vandelay / Batch Import Settings”).
  - If your batch of records does *not* have attached holdings, leave this dropdown blank.
- At the dropdown next to “Merge Profile”, select “Match-Only Merge”.
- At the dropdown next to “Select a Record Source”, select “System Local”.
- Click the checkboxes next to “Import Non-Matching Records”, “Merge on Single Match”, and “Merge on Best Match”.
- Click the “Choose File” button. Browse to where your record batch is, and select the file.
- Finally, click the green “Upload” button.