

Acquisitions MARC Uploading Troubleshooting

Bibliomation Practices

Mary Llewellyn

I get an error message when I try to upload the order. What's wrong?

The screenshot shows a web browser window at the URL `theory.biblio.org/eg/staff/acq/legacy/picklist/upload`. The page is titled "Upload" and contains various form fields for configuring an order upload. A modal error message is displayed in the center of the screen, stating: "theory.biblio.org says Event: 2002:DATABASE_QUERY_FAILED -> The attempt to query to the DB failed". The error message has an "OK" button.

The form fields on the page include:

- Create Purchase Order
- Activate Purchase Order
- Provider:
- Context Org Unit:
- Add to Selection List:
- Fiscal Year:
- Upload to Queue: Or create a new queue
- Record Match Set:
- Merge Profile:
- Import Non-Matching Records
- Record Source:
- Merge On Exact Match (901c)
- Merge On Single Match
- Merge On Best Match
- Best/Single Match Minimum Quality Ratio: New Record Quality / Quality of Best Match
- Insufficient Quality Fall-Through Profile:
- Load Items for Imported Records

At the bottom of the form, there is a "File to Upload:" section with a "Choose File" button, a text input containing "rdgTEST.mrc", and an "Upload" button.

I get an error message when I try to upload the order. What's wrong?

- Take a look at your provider field. Odds are, you skipped it. Click **OK** to make the error message go away, click the **Refresh** button at the top of the screen and set up the load again, this time with the provider field filled in.

I get an error message when I try to upload the order. What's wrong?

The screenshot shows a web application interface for library catalog management. At the top, there is a navigation bar with a home icon and menu items: Search, Circulation, Cataloging, and Acquisitions. Below this is a form for creating a purchase order. The form includes several sections:

- Basic Information:** Create Purchase Order (checked), Activate Purchase Order (unchecked), Provider (BTAF (RDG)), Context Org Unit (RDGFLD), Add to Selection List (mytest jan 4 2023 b), and Fiscal Year (highlighted in yellow with a warning icon).
- Queue and Match Settings:** Upload to Queue (empty), Record Match Set (Matchpoint), Merge Profile (Match-Only Merge), and Record Source (Vendor Order Records).
- Import and Merge Options:** Import Non-Matching Records (checked), Merge On Exact Match (901c) (unchecked), Merge On Single Match (unchecked), Merge On Best Match (checked), Best/Single Match Minimum Quality Ratio (0.0), Insufficient Quality Fall-Through Profile (empty), and Load Items for Imported Records (unchecked).
- File Upload:** File to Upload: Choose File No file chosen Upload

An error message dialog box is overlaid on the form, displaying the text: "theory.biblio.org says Event: :FILE_UPLOAD_ERROR ->". The dialog has an "OK" button.

I get an error message when I try to upload the order. What's wrong?

- Check to be sure you selected a file before clicking the **Upload** button. Click **OK** to make the error message go away, click the **Refresh** button at the top of the screen and set up the load again, this time with the file selected.

My load just keeps running and never seems to end

- Sometimes the links to the purchase order, selection list, or queue never display. Open a new tab and look for your purchase order and open it. (**Acquisitions/Purchase Order**)
- A suggested search:

The screenshot shows the 'Acquisitions Search' interface. At the top, there are tabs for 'Line Items Search', 'Purchase Orders Search', 'Invoices Search', and 'Selection Lists Search'. The 'Purchase Orders Search' tab is active. Below the tabs, there is a search bar with the text 'Search for records matching any of the following terms:'. The search criteria are set to 'Purchase Order - Creation Time', 'age (relative date)', '1', and 'days'. There are buttons for 'Search', 'Set As Default Purchase Order Search', and 'Reset Default Search'. A checkbox for 'Retrieve Results Immediately' is also present. Below the search bar, there is a 'Remove Filters' button and a table of results. The table has columns for '#', 'Name', 'Purchase Order ID', 'Provider', 'Ordering Agency', 'Creation Time', 'Edit Time', 'Order Date', 'Status', 'Cancel Reason', and 'Prepayment Required'. The table shows 4 records with IDs 48156, 48157, 48158, and 48159.

#	Name	Purchase Order ID	Provider	Ordering Agency	Creation Time	Edit Time	Order Date	Status	Cancel Reason	Prepayment Required
1	48156	48156	BTAF (RDG)	RDGFLD	1/4/23, 4:07 PM	1/4/23, 4:07 PM		pending		No
2	48157	48157	BTAF (RDG)	RDGFLD	1/4/23, 4:12 PM	1/4/23, 4:13 PM	1/4/23, 4:13 PM	on-order		No
3	48158	48158	BTAF (RDG)	RDGFLD	1/4/23, 4:23 PM	1/4/23, 4:23 PM		pending		No
4	48159	48159	BTAN (RDG)	RDGFLD	1/4/23, 4:29 PM	1/4/23, 4:29 PM		pending		No

My load just keeps running and never seems to end

- If you see “Link to catalog” under some of the line item titles and “catalog” under others, the loader is still running. Wait a while longer and check again by clicking on **Refresh** at the top of the screen until all line items say “catalog.”

<input type="checkbox"/>	 Nolo's essential guide to divorce / Doskow, Emily, 1413327664 8th edition. BTAN (RDG) Order Identifier <input type="text" value="ISBN"/> <input type="text" value="1413327664"/>	Expand	Copies(1)	Notes(0)	<input type="text" value="-- Actions --"/>	Pending-Order	<input type="text" value="24.99"/>
# 933481 1 → catalog 🔥 worksheet 🔗 mytest jan 4 2023 d requests view invoice(s) → queue							
<input type="checkbox"/>	 Patent it yourself : Pressman, David, 1937- 141332780X 20th edition. BTAN (RDG) Order Identifier <input type="text" value="ISBN"/> <input type="text" value="141332780X"/>	Expand	Copies(1)	Notes(0)	<input type="text" value="-- Actions --"/>	Pending-Order	<input type="text" value="49.99"/>
# 933482 0 → catalog 🔥 worksheet 🔗 mytest jan 4 2023 d requests view invoice(s) → queue							
<input type="checkbox"/>	 The power of fun : Price, Catherine, 1978- 0593241401 First edition. BTAN (RDG) Order Identifier <input type="text" value="ISBN"/> <input type="text" value="0593241401"/>	Expand	Copies(1)	Notes(0)	<input type="text" value="-- Actions --"/>	Pending-Order	<input type="text" value="27.00"/>
# 933483 1 → link to catalog 🔥 worksheet 🔗 mytest jan 4 2023 d requests view invoice(s) → queue							
<input type="checkbox"/>	 The Public Domain : Fishman, Stephen 1413327567 BTAN (RDG) Order Identifier <input type="text" value="ISBN"/> <input type="text" value="1413327567"/>	Expand	Copies(1)	Notes(0)	<input type="text" value="-- Actions --"/>	Pending-Order	<input type="text" value="39.99"/>
# 933484 0 → link to catalog 🔥 worksheet 🔗 mytest jan 4 2023 d requests view invoice(s) → queue							
<input type="checkbox"/>	 Quick & legal will book / Clifford, Denis, 1413327680 9th edition. BTAN (RDG) Order Identifier <input type="text" value="ISBN"/> <input type="text" value="1413327680"/>	Expand	Copies(1)	Notes(0)	<input type="text" value="-- Actions --"/>	Pending-Order	<input type="text" value="24.99"/>
# 933485 1 → link to catalog 🔥 worksheet 🔗 mytest jan 4 2023 d requests view invoice(s) → queue							
<input type="checkbox"/>	 Quick guide to choosing your college major / Shatkin, Laurence, 1782551638 2nd edition. BTAN (RDG)					Pending-	

My load finished, but all the line items still say “Link to catalog.” What happened, and what do I do about it?

- When you set up your load, you skipped the field marked “**Or create a new queue.**” The loader needs a queue name in order to process the bibliographic records, either matching existing records in the catalog or adding new records.

Upload to Queue Or create a new queue

Record Match Set

Merge Profile

Import Non-Matching Records

Merge On Exact Match (901c)

Merge On Single Match

Merge On Best Match

Best/Single Match Minimum Quality Ratio New Record Quality / Quality of Best Match

Insufficient Quality Fall-Through Profile

Load Items for Imported Records

Record Source

File to Upload:

Lineitems Processed	12
Vandelay Records Processed	0
Bib Records Merged/Imported	0
ACQ Copies Processed	6
Debits Encumbered	0
Real Copies Processed	0
Upload Complete!	

[View Purchase Order](#)

My load finished, but all the line items still say “Link to catalog.” What happened, and what do I do about it?

- A clue is that no “Vandelay Records” were processed and no Bib Records were merged or imported.
- Another clue is there no link to a queue on the line items.

Line Items		Expand All	Items	Notes	Actions	Status	Estimated Price
<input type="checkbox"/>	 Anna : Odell, Amy, 1985- 1982122633 First Gallery Books hardcover edition. 2022. Gallery Books, BTAF (RDG) Order Identifier <input type="text" value="ISBN"/> <input type="text" value="1982122633"/> # 982153 0 link to catalog worksheet demo 3 requests view invoice(s)	Expand	Copies(1)	Notes(0)	-- Actions --	Pending-Order	29.99
<input type="checkbox"/>	 Brighter by the day : Roberts, Robin, 1960- 1538754614 First edition. BTAF (RDG) Order Identifier <input type="text" value="ISBN"/> <input type="text" value="1538754614"/> # 982154 0 link to catalog worksheet demo 3 requests view invoice(s)	Expand	Copies(1)	Notes(0)	-- Actions --	Pending-Order	24.00
<input type="checkbox"/>	 The fighting soul : Rabin-Havt, Ari, 1631498797 First edition. BTAF (RDG)					Pending-	

My load finished, but all the line items still say “Link to catalog.”
What happened, and what do I do about it?

- But don't panic. You get another shot at creating a queue name.
- First, apply your fund to all the line items as you usually do.
- When the **Activate Order** button appears, click on it as you normally would.

My load finished, but all the line items still say “Link to catalog.” What happened, and what do I do about it?

- Instead of immediately beginning to activate the purchase order, the system will display a screen that looks similar to the loader screen. This is your second chance to get the system to link the bib records.
- Enter a name in the field labeled “**Or create a new queue.**” Click on **Submit.**

[Split Order by Lineitems](#)

Allow activation with zero-copy lineitems

--Actions--

Upload to Queue Or create a new queue

Record Match Set

Merge Profile

Import Non-Matching Records

Merge On Exact Match (901c)

Merge On Single Match

Merge On Best Match

Best/Single Match Minimum Quality Ratio New Record Quality / Quality of Best Match

Insufficient Quality Fall-Through Profile

Direct Charges, Taxes, Fees, etc.
There are no miscellanea attached to this purchase order.

My load finished, but all the line items still say “Link to catalog.” What happened, and what do I do about it?

- Now the line items say “catalog” and have a status of “On-Order.” The bibs and items will appear in the catalog.

--Actions--

Copies Owning Branch Copy Location Collection Code Fund Circ Modifier Distribution Formula

OR

Line Items		Expand All	Items	Notes	Actions	Status	Estimated Price
<input type="checkbox"/>	 <p>Anna : Odell, Amy, 1985- 1982122633 First Gallery Books hardcover edition. 2022. Gallery Books, BTAN (RDG) Order Identifier <input type="text" value="ISBN"/> <input type="text" value="1982122633"/></p> <p># 982147 2 → catalog 🔥 worksheet requests view invoice(s) → queue</p>	Expand	Copies(1)	Notes(0)	-- Actions --	On-Order	29.99
<input type="checkbox"/>	 <p>Brighter by the day : Roberts, Robin, 1960- 1538754614 First edition. BTAN (RDG) Order Identifier <input type="text" value="ISBN"/> <input type="text" value="1538754614"/></p> <p># 982148 1 → catalog 🔥 worksheet requests view invoice(s) → queue</p>	Expand	Copies(1)	Notes(0)	-- Actions --	On-Order	24.00
<input type="checkbox"/>	 <p>The fighting soul : Rabin-Havt, Ari, 1631498797 First edition. BTAN (RDG) Order Identifier <input type="text" value="ISBN"/> <input type="text" value="1631498797"/></p> <p># 982149 0 → catalog 🔥 worksheet requests view invoice(s) → queue</p>	Expand	Copies(1)	Notes(0)	-- Actions --	On-Order	26.95
<input type="checkbox"/>	 <p>Good eats 4 : Brown, Alton, 1962- 1419753525 BTAN (RDG) Order Identifier <input type="text" value="ISBN"/> <input type="text" value="1419753525"/></p>	Expand	Copies(1)	Notes(0)	-- Actions --	On-Order	40.00

When I try to activate my purchase order, the system hangs.

- Click on **Expand all** above the line item list and look at the copy level information for every line item. Look for lines that **don't have the branch information** filled in.

The screenshot shows a library acquisition system interface with a green navigation bar at the top. The main content area displays a list of purchase orders. Each order is represented by a header row with a table of details and a list of line items below it. The second order, with order number #943851, is highlighted with a red box around its 'Branch' field in the header table, which is currently empty. The other orders have their 'Branch' fields populated with 'BRKFLD'.

Branch	Barcode	Call Number	Fund	Copy Location	Circ Modifier	Collection Code	Note
BRKFLD	acq1153597	On Order	A-NONFIC (2022)	Acquisitions	acquisitions		

Order #943851

Branch	Barcode	Call Number	Fund	Copy Location	Circ Modifier	Collection Code	Note
			A-NONFIC (2022)		acquisitions		

Branch	Barcode	Call Number	Fund	Copy Location	Circ Modifier	Collection Code	Note
BRKFLD	acq1153599	On Order	A-NONFIC (2022)	Acquisitions	acquisitions		

Branch	Barcode	Call Number	Fund	Copy Location	Circ Modifier	Collection Code	Note
BRKFLD	acq1153600	On Order	A-NONFIC (2022)	Acquisitions	acquisitions		

When I try to activate my purchase order, the system hangs.

- To fix it, click on the Copies link for that line item. Enter your library code in the **Owning Branch** box (it may fill in automatically when you go to this screen), click on **Save Changes**, then **Return** to go back to the full purchase order. Repeat as needed. Apply a fund to the line items and activate the PO as you normally do.

The screenshot shows a library system interface with a green navigation bar at the top. The main content area displays a purchase order line item for the book "How Do I Un-Remember This?: Unfortunately True Stories" by Pellegrino, Danny. The item is currently in a state where it has 1 ordered copy but none have been received, invoiced, claimed, or cancelled. The estimated cost is \$25.99. Below the item details, there is an "Add/Edit Items" section with a "Return" button and a "Save Changes" button, both of which are highlighted with red boxes. The "Save Changes" button is also highlighted with a red box. Below this section, there are several rows of form fields for managing the purchase order, including "Owning Branch", "Copy Location", "Collection Code", "Fund", "Circ Modifier", and "Callnumber". The "Owning Branch" field in the second row is filled with "BRKFLD". At the bottom of the page, there are buttons for "New Charge" and "Save New Charges".

After I loaded my file, the purchase order didn't have any copies and it should have. What went wrong?

- The MARC file didn't have any tags with the order copy information in it. If this file was from Title Source or Ingram, you likely forgot to apply the profile (Title Source) or grid (Ingram) before downloading your order from the vendor site.
- If the file did contain the order tags, then was this order with a new provider that you just set up in Evergreen? The tag and subfields need to be defined on the Holdings Definition tab in the Provider record.

After I loaded my file, the purchase order didn't have any copies and it should have. What went wrong?

- Example from Bibliomation:

The screenshot displays the Bibliomation interface. On the left, a provider profile for 'B&T Adult F L154907 (rd-b&taf)' is shown with details such as Code (BTAF (RDG)), Owner (RDGFLD), Provider ID (104), Currency (US Dollars), and Active status (Yes). A 'Delete Provider' button is located below the profile. The main area features a navigation bar with tabs for Provider, Addresses, Contacts, Attribute Definitions, Holdings Definitions (selected), EDI, Invoices, and POs. Below the navigation, there is a 'Holdings Tag' input field containing '970' and a 'Save' button. A 'New Holdings Subfield' button is also present. On the right, there is a 'Set Default View' button and a table control showing '0 selected' items with navigation icons and a 'Rows 10' dropdown. The main table lists existing holdings subfields:

<input type="checkbox"/>	#	ID	Name	Subfield
<input type="checkbox"/>	1	349	Call Number	c
<input type="checkbox"/>	2	354	Circulation Modifier	e
<input type="checkbox"/>	3	353	Shelving Location	d
<input type="checkbox"/>	4	352	Estimated Price	p
<input type="checkbox"/>	5	350	Fund Code	f
<input type="checkbox"/>	6	356	Note	w
<input type="checkbox"/>	7	345	Owning Library	a
<input type="checkbox"/>	8	347	Quantity	b

After I loaded my file, the purchase order didn't have any copies and it should have. What went wrong?

- You can still use the purchase order, though if it's a big file, it will take a bit of work.
- On the Purchase Order screen, click on the check next to **Line Items** above the list of ordered titles. This will select all the titles. You can uncheck boxes if you want different quantities entered.



<input checked="" type="checkbox"/> Line Items		Expand All	Items	Notes	Actions	Status	Estimated Price
<input checked="" type="checkbox"/>	 Deadline Sandford, John. 9781611761986 2014. Penguin Putnam, Inc., mntest Order Identifier <input type="text" value="ISBN"/> <input type="text" value="9781611761986"/>	Expand	Copies(0)	Notes(0)	-- Actions --	Pending-Order	<input type="text"/>
# 327558 → catalog ↗ worksheet 🔗 mary test 10/15 requests view invoice(s) ⇌ queue							
<input checked="" type="checkbox"/>	 Lila Robinson, Marilynne. 9781427230119 2014. Macmillan, mntest Order Identifier <input type="text" value="ISBN"/> <input type="text" value="9781427230119"/>	Expand	Copies(0)	Notes(0)	-- Actions --	Pending-Order	<input type="text"/>

After I loaded my file, the purchase order didn't have any copies and it should have. What went wrong?

- Enter the following values in the dropdown boxes
- **Copies:** Quantity ordered: 1. You can edit individual lines if you ordered more copies of some titles.
- **Owning Branch:** select your branch code
- **Fund:** Whichever fund is appropriate to this order
- Depending on your local system requirements, you may also enter the Copy Location and Circulation modifier. (Bibliomation uses Acquisitions and acquisitions.)
- Click on **Apply to Selected.**

After I loaded my file, the purchase order didn't have any copies and it should have. What went wrong?

- Before you can activate the Purchase Order, you will need to add the price to each line item. There is no batch method to do this. This is where a large order will be a big job to fix manually, but it can be done.
- Activate the purchase order when all the lines have prices entered.

The bib records from my order are in the catalog, but I don't see my on order items. Why not?

- There are several possibilities for you to explore.
- -- Do the line items in the PO show that they have any copies? (Does the Copies entry on the line items say (0)? That means no copies associated with the line item) If there are no copies, see the previous question.
- -- Did you activate the purchase order yet? If not, the copies will appear once that has been done.
- -- If there are copies for each line item and the purchase order has been activated, then the best guess is that the button labeled **“Activate Without Creating Items”** was clicked instead of the regular **“Activate”** button. There is no way to undo this and try again. Once a purchase order has been activated, it can't be de-activated and activated again. Items will have to be created manually by the cataloger and they will not be linked to the line items in the purchase order.

The bib records from my order are in the catalog, but I don't see my on order items. Why not?

- At Bibliomation, most of our libraries don't transmit their orders via EDI, preferring to place their orders on the vendors' sites (Title Source, iPage).
- In this situation, we recommend they cancel the order and load it again, this time using the plain **Activate** button, so "on order" item will generate and display in the catalog, and be linked to the purchase order.