Import Profiles for Loading Brief Order Records and WCP into NZ

New Order, Repository and Update Inventory import profiles

Adapted from https://www.orbiscascade.org/technical-services-documentation

Procedures, Workflows, & FAQs

- Alliance NZ Bib Records with Multiple OCLC Numbers FAQ (February 2016)
- Alma Indication Rules FAQ (March 2016)
- Alma Originating System Version (February 2016)
- Automatic loading of WorldShare Collection (September 2016)
- Creating a Set of Boundwith Records (December 2015)
- Guidelines for Editing PCC (Program for Cooperative Cataloging) Bibs in WorldCat (September 2016)
- Overlay in Alma (December 2014)
- Publishing Bibs to OCLC (September 2015)
- YBP workflows
  - Loading Approval Records into NZ (September 2016)
    - GDrive version | PDF version
  - Loading Brief Order Records into NZ: Creating Import Profiles to Load Vendor Order Records (September 2016)
    - GDrive version | PDF version
  - Loading WCP Records into Network Zone, including Shelf Ready (September 2016)
    - GDrive version | PDF version

This document describes the procedures and settings for importing records into the Network Zone. This document will specifically discuss using YBP/Gobi but the considerations and setup will apply to other vendors. The import process is as follows:

1. Brief bibliographic record added to the NZ and PO line created. [New Order]

2. Full bib record overlays the brief record. [Repository]

3. For shelf ready materials, item record is updated. [Update Inventory]

Note: If your campus adopts the Gobi API, the New Order API replaces the New order import profile. The Gobi API transmits order data (list price, fund, quantity…) to Alma in XML rather than in Marc. Therefore mapping of Marc fields/subfields to Alma PO lines is not necessary.

And the daily OCLC load may negate the use of a repository import profile to import full records into the NZ.

1. New order

General Considerations

- Use the New Order import profile to load EOCR (Electronic Order Confirmation Records) or EOD (Encoded Order Data) records. The brief bibliographic record will contain bibliographic data and order information.
- When importing records into the NZ, the goal is to avoid adding a duplicate record.
- In order to support the use of a single bib in the NZ, it may be necessary to have multiple match points in the 035 fields, including the OCLC number and vendor ID numbers.
- The YBP Unique Identifier (UID) (aka Gobi title ID) number is the manifestation-level number assigned to each title. For example, hardback and paperback editions have different YBP UID numbers.
- The YBP Order Key (the order number) is the unique ID for each order transaction.

The following are instructions for setup with YBP/Gobi and for creating import profiles.

Vendor Communication and Setup

If you plan to load EOCR records from YBP/Gobi:

- have YBP/Gobi put the YBP UID (aka Gobi title ID) in field 035 $a
- have YBP/Gobi include the YBP Order number in a library-chosen field (e.g. 980) for mapping to Alma's Vendor Reference Number.
- work with YBP/Gobi to include the purchase order line (POL) data in the EOCR file (Tech Specs)

Translation table

Marc field	Alma	YBP/Gobi	OCLC
035 $a	Match point	YBP UID (aka Gobi title ID)	Vendor book number
980 $f *	Vendor reference number	YBP order key (order number)	Vendor order number

(*Example only. Varies by institution depending on configuration)

(Note: This table is a sample only. Mapping will vary by institution.)

Marc field	subfield	Data description
035	$a	YPB UID (aka Gobi title ID)
980	$a	order date
980	$b	list price (explicit decimal)
980	$d	order note 1 (note to YBP)
980	$f	YBP order key
980	$g	quantity
980	$h	local data 2 (library)
980	$s	subaccount number
981	$a	volume
981	$b	fund code
981	$c	location code

981	$d	local data 1 (interested user)
981	$e	initials
981	$f	local data 3 (item policy)
981	$j	local data 4 (rush request)

Import Profile Settings for Brief Records

Profile Details: Use the "New Order" profile type, and make sure to select "Use Network Zone" on the first screen when you create your import profile. You cannot change this setting after the first time you save the import profile.

Normalization and Validation:

To remove institution specific order data from the 980 and 981 fields in the bibliographic record, use the "out of the box" Normalization Rule: Remove Vendor Data 980 981 993. The order will still be created in Alma, but the local data will not be stored in the NZ record.

Match Profile:

This is the most problematic part of the Import Profile, particularly for brief bib records, because improper match settings and processes can result in duplicate records. Bib records may have a vendor record number in

the $035|a and ISBN in $020|a. They may also include an additional 035|a with an OCLC number. Depending on the size of your record downloads, the size of your acquisitions staff, and the expertise in using Import Profiles, decide which process/match points and handling settings listed below are best for your library.

Process Options:
1. Single-phase import process with one import profile, matching on ISxN/024/035 (i.e. ISBN or ISSN or 024 or 035) with automatic or manual handling.

2. Multi-phase import process with two or three import profiles, first matching on 035 with automatic handling and doesn't load any non matches, and then matching on ISxN/024/035 with automatic or manual handling.

    a. If records have OCLC numbers: Three-phase import process: the first matching on OCLC Unique Identifier with automatic handling and doesn't load any non matches, the second import profile matching on the 035 (Other System Identifier) with automatic handling and doesn't load any non matches, the third import profile matching on ISxN/024/035 with automatic or manual handling.

    b. If records have vendor record numbers: Two-phase import process: the first matching on the 035 (Other System Identifier) with automatic handling and doesn't load any non matches, the second import profile matching on ISxN/024/035 with automatic or manual handling.

Note: The ISxN/024/035 Match Method is not hierarchical, and it can match on any of these match points. Also, it has the potential for improper matches with ISBNs for electronic resources and with ISBNs for a different OCLC record than you will receive in your WCP file, in which case you would then need to transfer your holdings to the proper bib record in the NZ. Use with caution.

Handling options:
1. Manual handling: every single (1 to 1 match) and multi-match found will need to be resolved manually at the time of import (i.e. the library chooses the correct record or chooses to import record if the correct record isn't in the NZ). Records without matches will be added to the NZ.
2. Automatic handling: only multi-matches will need to be resolved. (i.e. the library chooses the correct record or chooses to import the record if the correct record isn't in the NZ). Records without matches will be added to the NZ.
3. For both options, you may use the import report to determine if any matches were linked to incorrect bib records and relink as necessary.

Single phase - Manual handling

Create a New Order Import Profile with a Manual handling method that uses the ISxN/024/035 Match Method and upon no match Adds to NZ. Because you will use the NZ record upon match, you need to disable the "Do not override/merge record with an older version" option.

Profile Details	Normalization & Validation	Match Profile	Set Management Tags

Match Profile

Serial match method	ISSN / 024 / 035 Match Method ▾
Non Serial match method	ISBN / 024 / 035 Match Method ▾

Match Actions

Handling method ○Automatic ◉Manual

Merge/Overlay

Merge method	CSU Bib Overlay NZ ▾
Allow bibliographic record deletion	☐
Do not Override/merge a record with lower brief version	☐
Unlink bibliographic records from community zone	☐
Do not override/ merge record with an older version	◉Disabled ○Consider Originating System ○Ignore Originating System

No Match

Upon no match ◉Add To NZ ○Do Not Import ○Import To IZ

With Manual handling, you will need to choose which record to match to. If there is no match, then the record is added to the NZ. If your incoming records match with many NZ records, this could be time consuming.

Single phase - Automatic handling

Create an Import Profile with an Automatic handling method that uses the ISxN/024/035 Match Method and upon no match Adds to NZ.

| Profile Details | Normalization & Validation | Match Profile | Set Management Tags |

Match Profile

Serial match method   ISSN / 024 / 035 Match Method ▼
Non Serial match method   ISBN / 024 / 035 Match Method ▼

Match Actions

Handling method   ◉Automatic ⊙Manual
Upon match   ⊙Merge ⊙Overlay ⊙Do Not Import ◉Use NZ Record
Merge/Overlay
Merge method   CSU Bib Overlay NZ ▼
Allow bibliographic record deletion   ☐
Do not Override/merge a record with lower brief version   ☐
Unlink bibliographic records from community zone   ☐
Do not override/ merge record with an older version   ◉Disabled ⊙Consider Originating System ⊙Ignore Originating System

Automatic Multi-Match Handling

Disregard matches for bibliographic CZ linked records   ☑
Disregard invalid/canceled system control number identifiers   ☑
Prefer record with the same inventory type (electronic/physical)   ☐
Skip and do not import unresolved records   ☐

No Match

Upon no match   ◉Add To NZ ⊙Do Not Import ⊙Import To IZ

Multi-phase process:

This involves creating 2-3 different Import Profiles which are used in a tiered fashion.

#1: If you are importing records with OCLC numbers in brief records, create a New Order Import Profile with Automatic handling that uses the Unique OCLC Identifier Match Method and does not import upon no match. If your records do not contain OCLC numbers you may skip this step and proceed to Step 2.

Profile Details	Normalization & Validation	Match Profile	Set Management Tags

Match Profile

Serial match method	Unique OCLC Identifier Match Method ▼
Non Serial match method	Unique OCLC Identifier Match Method ▼

Match Actions

Handling method	◉Automatic ○Manual
Upon match	○Merge ○Overlay ○Do Not Import ◉Use NZ Record

Merge/Overlay

Merge method	CSU Bib Overlay NZ ▼
Allow bibliographic record deletion	☐
Do not Override/merge a record with lower brief version	☐
Unlink bibliographic records from community zone	☐
Do not override/ merge record with an older version	◉Disabled ○Consider Originating System ○Ignore Originating System

Automatic Multi-Match Handling

Disregard matches for bibliographic CZ linked records	☑
Disregard invalid/canceled system control number identifiers	☑
Prefer record with the same inventory type (electronic/physical)	☐
Skip and do not import unresolved records	☑

No Match

Upon no match	○Add To NZ ◉Do Not Import ○Import To IZ

#1b. Next, go to Monitor and View Import under either Acquisitions or Resource Management.

Import
Import
Upload Single Record From File
Monitor and View Imports
Resolve Import Issues

Find the import job you just ran and choose Action – Report. In the report, open the Records Not Imported tab and go to the Action button for Total records not imported/deleted.

Counters

Total records processed	3
Total records imported to NZ	2
Total records deleted from NZ	0
Total records not imported/deleted	1
Total PO lines processed	2
Total PO lines imported	2
Total physical items processed	2
Total physical items imported	2

➕ **Bibliographic Record Matches**

➕ **Bibliographic Records Imported**

➕ **Records Not Imported**

➕ **PO Lines**

➕ **Physical items**

– Records Not Imported

		Count
1	Total records not imported/deleted	1
2	Records not imported upon no match	0
3	Records not imported, too many multi-matches results	0
4	Records not added (manual match)	0
5	Records not added (manual validation)	0
6	Records not added (automatic match)	0
7	Records not added (automatic multi-match)	1
8	Total records matched and skipped	0
9	Records locked by user/process	0
10	Records linked to CZ	0
11	Records duplicated in Job	0
12	Records not deleted since profile not allowing	0
13	Records with newer version in repository	0
14	Records with brief/non brief conflict	0
15	Local records already linked to NZ	0
16	Records failed	0
17	Records rejected	0
18	Records skipped by filter	0

Actions

Download sources (XML) ctions
Download sources (binary)
Actions

Choose the source that matches the Physical source format under the Profile Details tab (usually binary) and download the Zip file. The Zip file will have the Process ID number in its name. The actual MARC file will be called "file_0.mrc" so you may want to rename it. You will use this file to run an import profile in the next step.

#2: Create a New Order Import Profile with Automatic handling that uses the 035 (Other System Identifier) Match Method and does not Import upon no match.

Profile Details	Normalization & Validation	Match Profile	Set M

Match Profile

Serial match method	035 (Other System Identifier) Match Meth⊽
Non Serial match method	035 (Other System Identifier) Match Meth⊽

Match Actions

Handling method ⦿Automatic ○Manual

Upon match ○Merge ○Overlay ○Do Not Import ⦿Use NZ Record

Merge/Overlay

Merge method	CSU Bib Overlay NZ ⊽
Allow bibliographic record deletion	☐
Do not Override/merge a record with lower brief version	☐
Unlink bibliographic records from community zone	☐
Do not override/ merge record with an older version	⦿Disabled ○Consider Originating System ○Ignore O

Automatic Multi-Match Handling

Disregard matches for bibliographic CZ linked records	☑
Disregard invalid/canceled system control number identifiers	☑
Prefer record with the same inventory type (electronic/physical)	☐
Skip and do not import unresolved records	☑

No Match

Upon no match ○Add To NZ ⦿Do Not Import ○Import To IZ

Repeat procedure in step #1b above. (Use the records that did not import to run import #3.)

#3: Create a New Order Import Profile with Manual handling that uses the ISxN/024/035 Match Method and upon no match Adds to NZ.

This multi-phase process reduces the potential for improper matching by using specific match points in separate import profiles. By using a more specific match point first, you assure matching on just the OCLC number or just the 035 field if there is such a match. The ISxN/024/035 Match Method is broader and will match on all possible match points – whether that is an OCLC number, a vendor number, or an ISxN.

Other considerations:

- **Handling Method**: If you choose "Automatic," Alma will handle 1 to 1 matches and you will only have to manually handle multi-matches (i.e. the imported record matches two or more NZ records). If you choose "Manual", you will have to manually handle all matches (i.e. the imported record matches one or more NZ records). It's useful to choose "Manual" when you are first learning to load records.
- Do **NOT** use:
  o "**Allow bibliographic record deletion**" feature in any import profiles at this time.
  o "**Do not override/merge a record with a lower brief version**" option at this time.
  o "**Do not override/merge record with an older version**" for any New Record Import Profile. Keep at Disabled.
- **OPTIONAL SETTINGS (Automatic Multi-Match Handling)**:
  o "**Unlink bibliographic records from the Community Zone**" (you will only see this if your "ignore_cz_records" option in Resource Management > Resource Configuration > Configuration Menu > Other Settings is set to false): Applies only when Merge and Overlay is the Upon Match setting, so it isn't necessary to select in a New Order import profile.
  o "**Disregard Matches for Bibliographic CZ linked records**" (you will only see this if your "ignore_cz_records" option in Resource Management > Resource Configuration > Configuration Menu > Other Settings is set to false; notice the option is in the first screenshot but not the second.): If this option is selected, Alma will not consider Community Zone records that match your incoming record. So if a record you are loading is a multi-match situation, but one of the records is a CZ record, it will automatically choose the non-CZ record. This is a good option to choose to cut down on manual handling for multi-matches.
  o "**Disregard invalid/canceled system control number identifiers**": If this option is selected, Alma will ignore the incoming record's 035$z and only use the incoming record's 035$a against the repository's 035$a and 035$z. This is a useful setting if your order records have OCLC#s.
  o "**Prefer record with the same inventory type (electronic/physical)**": This setting has some problems and can cause incorrect matches when there are NZ records without the inventory you are loading (e.g. usually when you are loading a print record and there is only an electronic bib in the NZ) or when there are two or more print bibs, but there is inventory on the wrong bib (i.e. the brief bib or the wrong OCLC full bib). Using this setting causes more relinking at the point of loading full bibs from WCP or when using Connexion.
  o "**Unresolved records, skip and do not import**": With this option, any records in the file that result in multi-matches will not be loaded and you will not be able to manually handle/resolve them in Alma. If this option is selected, you will need to download the Marc records from the Job Report and load them with 1) an import profile that has Manual Handling selected or 2) an import profile that has the Automatic Handling option selected and the Skip and Do not Import option unchecked. If your records are scheduled to load automatically or if you're loading very large files of records, this might be a good option.

Set Management Tags:

When downloading records to the NZ, do NOT suppress records/s from publish/delivery.

Inventory Information:

POL (Purchase order line) Information

Required:

Vendor Reference Number field, List Price field, PO Line Owner field, Fund Distribution field

Optional:

Rush - If you want to map Rush orders to the checkbox in the POL, you need to include any of the following values in a field in your EOCR: **y, Y, true, True, affirmative**. You can use one of the note fields in the order details and then work with YBP/Gobi to map that field to the EOCRs.

Reporting Code - Alma lets you define reporting codes that can be used for analyzing acquisitions in subsequent reporting. Libraries need to make sure the data they are trying to map to the Reporting Code field exists in the Reporting Code table in Alma, as well as in the EOCR data they are loading. Reminder: the data is case sensitive, so if RR is the code in your table, your data will not map as rr.

Interested users - If you want to map an interested user, you will need the ID number of the patron. Please note that while in the POL itself you can place holds for interested users, if you use this feature in your EOCR record you can only notify the patron.

Receiving note - Anything mapped to this field will be included in the receiving note on the Summary tab of the POL.

Mapping

Mapping is a local configuration specific to your campus. This mapping feature is useful when you need to map a location code to a library/sub-location in your library. It is especially useful during migration when you might still be receiving one code that represents both library and location information from a vendor (e.g. mlstk). You can then map that code to the corresponding fields in Alma. The screenshot below shows how the single code "mlstk" is mapped to "Klamath Falls" library and the "Books" location.

	Source Value	Location
1	mlstk	Bookstacks (Klamath Falls Library)
2	mlref	Reference (Klamath Falls Library)
3	mlvid	AV (Klamath Falls Library)

Another example might be during switching of fund codes. You can map old fund codes in YBP/Gobi records to the new Alma fund codes.

2. Repository

Purpose: to overlay brief bibliographic records with full records

Because what you do impacts other libraries, it's important to be careful when adding records to the NZ. There are two principle ways to add records to the NZ:

1. Directly from Connexion, and
2. Using brief or full records from a vendor using an Alma Import Profile.

General Considerations

- When loading brief bibliographic records and Worldcat Cataloging Partner (WCP) records in the NZ, the goal is to avoid adding a duplicate record.
- In order to support the use of a single bib in the NZ, it may be necessary to have multiple match points in the 035 fields, including the OCLC number and vendor ID numbers.
- The YBP UID number (aka Gobi title ID) is the manifestation-level number assigned to each title. Hardback and paperback editions have different YBP UID numbers.
- The YBP Order Key is the unique ID for each order transaction.

The following are instructions for setup with YBP/Gobi and WCP, and for creating Alma Import Profiles.

Vendor Communication and Setup

Translation table:

Marc field	Alma	YBP/Gobi	OCLC
035 $a	Match point	YBP UID (aka Gobi title ID)	Vendor book number
980 $f *	Vendor reference number	YBP order key (order number)	Vendor order number

(*Example only. Varies by institution depending on configuration)

YBP/Gobi

If you plan to load WCP records from OCLC, you should have the YBP UID (Vendor Book Number) in field 035 $a and the YBP Order Key (Vendor Order Number) in a library-chosen field (e.g. 980) for mapping to the Vendor Reference Number.

Electronic Order Confirmation Records (EOCRs)
1. Provide EOCRs for orders placed in GOBI on 6926-09, -10 & -12.
2. Output bibliographic and local data as follows:

Field	Indicator 1	Indicator 2	Subfield	Data Description
20			$a	ISBN
35			$a	YBP UID
100			$a	Author
245			$a	Title
250			$a	Edition
260			$a	Place Of Publication
260			$b	Publisher
260			$c	Year Of Publication
490			$a	Series Statement
980			$a	Order Date (yymmdd)
980			$b	List Price (explicit decimal)
980			$d	Order Notes 1 [Note To YBP]
980			$f	YBP Order Key
980			$g	Quantity
980			$h	Local Data 2 [Library]
980			$s	Subaccount Number
981			$a	Volume
981			$b	Fund Code
981			$c	Location Code
981			$d	Local Data 1 [Interested User]
981			$e	Initials
981			$f	Local Data 3 [Item Policy]
981			$j	Local Data 4 [Rush Request]

(Example Tech Spec. Varies by institution depending on configuration)

WorldCat Cataloging Partners (PromptCat)

WorldShare - Collection Manager - Settings - MARC Records - Cataloging Partner Options

You may want to include PDRs (Partnering Data Records), so that your files have full coverage, e.g. for approval loads:

WorldShare - Collection Manager - Settings - MARC Records - Customize Records

(Example only. Varies by institution depending on configuration)

Import Profile Settings for WorldCat Cataloging Partners

For matching purposes, it may be necessary that your WCP records contain the YBP UID in the 035 $a.

General information:

1) If you are only using WCP records to overlay briefs bibs with full records, you will only need to use a Repository Import Profile which uses the 035 (Other System Identifier) Match Method. This process does not affect item records.

2) If you receive shelf-ready books from YBP/Gobi and use WCP for full record bibs with barcodes included, you currently will need to use a two-step Import Profile process. First you will overlay the bib record as above using a Repository profile and secondly, you will update item information (e.g. adding a barcode) to the item record using an Update Inventory profile. This is necessary because matching via Update Inventory uses an IZ match point in the POL.

Repository Import Profile

Profile Details

Use the "Repository" profile type, and make sure to select "Use Network Zone" on the first screen when you create your import profile. You cannot change this setting after the first time you save the import profile.

Normalization and Validation

NOTE: To remove institution specific order data from the 980 and 981 fields in the bibliographic record, use the "out of the box" Normalization Rule: Remove Vendor Data 980 981 993. The local data will not be stored in the NZ record.

Profile Type	Repository			Profile name
Profile Details	Normalization & Validation	Match Profile	Set Management Tags	Inventory Information

Filter

Filter out the data using

Normalization

Correct the data using   Remove Vendor Data 980 981 993

Validation Exception Profile

Handle invalid data using   MarcXML Bib Import

Match Profile

Match Profile

Serial match method	035 (Other System Identifier) Match Meth ▼	Sys
Non Serial match method	035 (Other System Identifier) Match Meth ▼	Sys

Match Actions

Handling method   ⦿Automatic ◯Manual

Upon match   ⦿Merge ◯Overlay ◯Do Not Import ◯Use NZ Record

Merge/Overlay

Merge method   CSU Bib Overlay NZ   ▼

Select Action

Allow bibliographic record deletion   ☐

Do not Override/merge a record with lower brief version   ☐

Unlink bibliographic records from community zone   ☐

Do not override/ merge record with an older version   ⦿Disabled ◯Consider Originating System ◯Ignore Ori

Automatic Multi-Match Handling

Select Action

Disregard matches for bibliographic CZ linked records   ☑

Disregard invalid/canceled system control number identifiers   ☑

Prefer record with the same inventory type (electronic/physical)   ☐

Skip and do not import unresolved records   ☐

No Match

Upon no match   ◯Add To NZ ⦿Do Not Import ◯Import To IZ

- **Handling Method**:If you choose "Automatic," Alma will handle 1 to 1 matches and you will only have to manually handle multi-matches (i.e. the imported record matches two or more NZ records). If you choose "Manual", you will have to manually handle all matches (i.e. the imported record matches one or more NZ records). It's useful to choose "Manual" when you are first learning to load records.
- Do **NOT** use:
  - **"Allow bibliographic record deletion"** feature in any import profiles at this time.
  - **"Do not override/merge a non-brief record with a brief version"** option at this time.
  - "**Do not override/merge record with an older version**" for any New Record Import Profile. Keep at Disabled.

- **Automatic Multi-Matches Handling (Optional settings):**
  - **Unlink bibliographic records from the Community Zone** (you will only see this if your "ignore_cz_records" option in Resource Management > Resource Configuration > Configuration Menu > Other Settings is set to false): Applies only when Merge and Overlay is the Upon Match setting, so not necessary in a New Order import profile.
  - **Disregard Matches for Bibliographic CZ linked records:** (you will only see this if your "ignore_cz_records" option is set to false): If this option is selected, Alma will not consider Community Zone records that match your incoming record. So if a record you are loading is a multi-match situation, but one of the records is a CZ record, it will automatically choose the non-CZ record. This is a good option to choose to cut down on manual handling for multi-matches.
  - **Disregard invalid/canceled system control number identifiers:** If this option is selected, Alma will ignore the incoming record's 035$z and only use the incoming record's 035$a against the repository's 035$a and 035$z. This is a useful setting if your order records have OCLC#s.
  - **Prefer record with the same inventory type (electronic/physical):** This setting has some problems and can cause incorrect matches when there are NZ records without the inventory you are loading (e.g. usually when you are loading a print record and there is only an electronic bib in the NZ) or when there are two or more print bibs, but there is inventory on the wrong bib (i.e. the brief bib or the wrong OCLC full bib). Using this setting causes more relinking at the point of loading full bibs from WCP or when using Connexion.
  - **Unresolved records, skip and do not import:** With this option, any records in the file that result in multi-matches will <u>not</u> be loaded and you will not have the option to manually handle them <u>during the load</u>. If this option is selected, you will need to download the records from the Job Report as .mrc or .xml files and load them with 1) an import profile that has Manual Handling selected or 2) an import profile that has the Automatic Handling option selected and the Skip and Do not Import option unchecked. If your records are schedule to load automatically or if you're loading very large files of records, this might be a good option.

Set Management Tags

Inventory Information

To prevent adding an additional item record, select None.

NOTE: If you have shelf-ready books and need to add the barcode to the item record, you will need to import the records a second time using the Update Inventory Import Profile detailed below.

3. Update Inventory

The Update Inventory is used to add item information, receive the option, and/or update the call number.

Import Profile Settings for Shelf Ready and WCP

With shelf ready books, you may need to add additional information to the item record (such as a barcode). You can do this using the Update Inventory profile. This allows you to add the item barcode, receive the item (optional), and update the call number (optional). If you receive the item, this will add an Acquisitions Tech Services Process work order type that Ex Libris has says is automatic and cannot be avoided currently.

	Title	FIND OUT ANYTHING FROM ANYONE, ANYTIME : SECRETS OF CALCULATED QUESTIONING FROM A VETERAN INTERROGATO			
	MMS ID	99318043299801451	Originating system	OTHER	Originating system ID 99318043299801451
Suppress from publishing	No		Synchronize with external system	No	Brief record No

LDR	00439nam 2200121z 4500
008	140522n xx | u||| ||und u
001	99318043299801451
020	__ |a 9781601632982
035	__ |a 10678095
100	__ |a PYLE, JAMES
245	__ |a FIND OUT ANYTHING FROM ANYONE, ANYTIME : SECRETS OF CALCULATED QUESTIONING FROM A VETERAN INTERROGATO
260	__ |b CAREER PRESS |c 2014
980	__ |a 20140521 |b 15.99 |c 1 |d 665310 |e 99958690804
981	__ |b trad |c cascade |d main |e tg |f yes |g hold for tony greiner

The Vendor Reference Number or the Additional PO Line Reference number is the match point for the Update Inventory import profile. We used the YBP Order Key (ex: 99958690804) as the vendor reference number (example below). The match point you choose must be in the POL (Purchase order line) and in the record you are loading using the Update Inventory Profile.

PO Line details

Acquisition method	Purchase at Vendor System ▾
Invoice status	No invoice ▾
Rush	☑
Cancellation restriction	☐
Identifier	9781601632982
Vendor reference number	99958690804
Note to vendor	

Example Item record in the IZ before loading the full record using the Update Inventory import profile (Note: no barcode, no receiving date, and no process type)

<table>
<tr><td>Resource description</td><td>FIND OUT ANYTHING FROM ANYONE, ANYTIME : SECRETS OF CALCULATED QUESTIONING FROM A VETERAN INTERROGATO PYLE, JAMES CAREER PRESS 2014 [9781601632982]</td></tr>
</table>

Holding	Cascade: Main;	View all holdings
Barcode	-	View all items
Process type	Acquisition	

| Summary | General Information | ENUM/CHRON information | Notes | History |

Barcode		Copy ID	
Material type	Book	Item policy	
Inventory date		Provenance	
PO line	POL-55989	Is Magnetic	
Receiving date		Expected receiving date	
Enumeration A		Enumeration B	
Chronology I		Chronology J	
Description			Generate Clear
Replacement cost		Receiving operator	
Process type			

Full WCP record to Load. Barcode in 981 $h and Vendor Reference Number in 980 $f

```
=LDR  01840cam  2200469 i 4500
=001  ocn862053104
=003  OCoLC
=005  20140603091837.0
=008  131031s2014\\\\\nju\\\\\\\\\\\\001\0\eng\\
=010  \\$a  2013040946
=040  \\$aDLC$beng$erda$cDLC$dBDX$dUKMGB$dYDXCP$dSPB$dVET
=016  7\$a016542069$2Uk
=019  \\$a868155586
=020  \\$a9781601632982
=020  \\$a1601632983
=020  \\$z9781601634931 (ebook)
=035  \\$a10678095
=035  \\$a(OCoLC)862053104$z(OCoLC)868155586
       :
       :
=938  \\$aYBP$bYANK$n10678095
=980  \\$a20140521$b15.99$c1$d665310$f99958690804
=981  \\$btrad$ccascade$dmain$etg$fyes$ghold for john doe$h33019007567382
=994  \\$aC0$bOQP
```

Profile Details

The Update Inventory is solely used to add item (IZ) information and therefore Use Network Zone is No.

Normalization and Validation

Match Profile

(Skip and do not import is optional)

Inventory Information

Updating holdings with the call number in the bib is optional, as is receiving the item as part of the import process. It's important that the library and location data in the record you are loading match the library and location in the POL so those fields need to be included as well as any new information -- such as a Barcode field.

Profile Details	Normalization & Validation	Match Profile	Inventory Information

Inventory Operations

⊙ Electronic ⊙ Mixed ⦿ Physical

Physical Item Mapping

Material type	Book		
Mapping Policy	⦿ Basic ⊙ Advanced		
Library field	981	subfield	c
Location field	981	subfield	d
Default library			
Map library/location	☑		
Number of items field	980	subfield	c
Barcode field	961	subfield	h
Item policy field		subfield	
Alternative Call Number		subfield	

Call Number Mapping

Update holdings call number ☑

Inventory Handling

Receive item? ☑

(Example only. Varies by institution depending on configuration)

PO Line Information

As mentioned earlier, it's important to have the data in the WCP record matched to the data in the IZ POL. In the example below, the Import Profile's Vendor Reference Number field points to the information in the WCP record field 980 $f (99958690804) which matches the Vendor reference number in the PO line.

Update Inventory report

After running the Update Inventory Import Profile, go to Monitor and View Imports in the Alma Menu to view the results. No records are imported; only the item information is updated.

Process ID 18612682410001848
Started on 06/03/2014 09:31:32 PDT
Total run time 3 Seconds
Status Completed Successfully
Files Processed 1

Counters

Total records processed	1
Total records imported	0
Total records deleted	0
Total records not imported/deleted	1
Total physical items processed	1
Total physical items imported	1

In the item record, the barcode and receiving date are populated and the process type can be set (if you chose to receive the item during the Update inventory process).

Resource description FIND OUT ANYTHING FROM ANYONE, ANYTIME : SECRETS OF CALCULATED QUESTIONING FROM A VETERAN INTERROGATO PYLE, JAMES CAREER PRESS 2014 [9781601632982]

Holding Cascade: Main; 158 3/9   View all holdings
Barcode 33019007567382   View all items
Process type Acquisition technical services (Technical Services Processing)

| Summary | General Information | ENUM/CHRON information | Notes | History |

Barcode	33019007567382		Copy ID	
Material type	Book		Item policy	
Inventory date			Provenance	
PO line	POL-55989		Is Magnetic	
Receiving date	06/03/2014		Expected receiving date	
Enumeration A			Enumeration B	
Chronology I			Chronology J	
Description				Generate Clear
Replacement cost			Receiving operator	System
Process type	Acquisition technical services		At *	sylvania Acquisitions Department