Import Textbooks

Contents

Overview

> ⓘ this information has been moved to https://support.goalexandria.com/operations/import/import-items/

Tools > Import > Textbooks > Saved tab

Overview

> ⚠ For textbook imports, Alexandria accepts .txt and .tsv file types. All tab-delimited format import files that don't have a header will require field mapping.

This is a brief summary of the import. The contents of this and other tabs may change based on the import you've selected.

Settings

Name

> Enter a name for this saved import.

Created

> Displays the name of the operator who created the import and their Site ID Code. It cannot be edited.

Notes

> Enter general usage notes about the import here. Something like, *"Only perform this import at the end of each month!"*

Favorite

> Save this to your favorites list for easy access.

Shared

> Share this with other operators in your library or union. This is often helpful when particular imports are used frequently.

Settings
Settings

This is where you configure how title and copy information is imported into your database.

Import Settings

Add or Update Titles & Copies

Add or update title and copy records. Copies will only be updated if they match the associated title record.

- Title records will be updated if they match the title record number, title ID, ISBN, copy record number, or copy barcode (checked in that order). If there is not an existing copy to update, a new title will be added.
- If copy data is in the import file, a copy record will be created and added to the title record.
- If a title is added and the associated copy barcode is in use, the import will follow Barcode Handling rules.

Add Titles & Copies

Add a new title record for every import file record.

- If there are any copy fields, or if *Always add at least one Copy* is selected, a copy record will be created for the new title.
- Titles and copies cannot be updated with this setting.

Update Copies

Each import record that matches the copy record number or copy barcode will be updated. Title fields will be ignored.

- If a copy record number is used to match, the import *can* be used to update the matching copy record's barcode using Barcode Handling rules.
- If a matching copy record is not found, the imported record will be ignored.

Always add at least one Copy

This option specifies that at least ONE new copy is always added when a title is added or modified. When adding a copy, the next available barcode is used. If one or more copies are added when the title is added or modified, additional copies are NOT added.

Title Update Matching

Match up and update existing titles by either Title ID or ISBN. Note: Title matching is an 'exact' match.

- Title ID
- ISBN & Title

⚠

⚠️ Record numbers can never be changed; they are used for matching only.

Before Importing

Skip First Record if Field Mapping

This is usually recommended when the first record in your import file contains an unrecognized header. The setting will ignore recognized COMPanion headers so they are imported properly.

Barcode Handling

The following settings determine how copy barcodes are handled when adding copy records to a new or existing title.

Staring Textbook Barcode

When a new item barcode number is required, Textbook Tracker will assign numbers beginning with the value you enter in this field. If a barcode is already in use, a new barcode will be automatically selected.

Always Assign New Barcodes

All item barcodes will be reassigned starting with the Starting Textbook Barcode number (above). If you know for sure that your vendor assigned "dummy" barcode numbers with your MARC records, use this option to force Textbook Tracker to assign new barcode numbers according to the Next Barcode setting in your Patron Defaults preferences.

Never Reassign Barcodes

Trying to add copy data with duplicate barcode numbers will cause the imported record to be ignored. Use this setting if you want existing copy data to be updated, not reassigned.

Reassign Only Duplicate Barcodes

Imported barcodes that already exist in your database (duplicates) will not be reassigned. (Default)

Options
Options

The options in this tab only apply to added items. It is disabled when the import setting is set to *Update Copies.*

Copy Data Options

| Overview | Settings | **Options** | Schedule | Notification | FTP |

Title **Copy**

Copy Data Defaults

Site [AMS - Adams Middl... ▼]   ☐ Only Import Copies With Site Code: AMS

Copy Location [   ]   ☐ Only Import Copies With This Copy Location

Copy Shelving [   ]

Vendor [   ]

Copy Policy [eBook ▼]

☐ Set New Copies as 'In Processing'

Run

Site

Select the site the items will be assigned to. The dropdown menu is disabled if there is only one site in your union.

Only Import Copies with Site Code: XXX

Check this box to narrow your import to copies at a single site.

Copy Location

This information can help patrons find items in your library. Patrons generally locate copies by call number, but if you have items outside of the library or in an unusual place, you can enter that location here. Examples: *Music Room* or *Computer Lab*.

Copy Shelving

This is a second location indicator option if you want to further detail the location of items on specific shelves at your location.

Vendor

Enter the name of the vendor from which the copy was received.

Default Copy Policy

Enter a copy policy to be applied if the copy is imported without policy data. The default policy for the site performing the import is specified in **Preferences > Items > Item Defaults > Default Policy**.

Set New Copies as 'In Processing'

Check this box to set the status of newly imported copies to *In Processing* after it's imported.

Title Data Options

Title Policy

Select the policy to be applied to the items you're importing.

Schedule

Schedule

Use these settings to schedule this import to run on a regular basis.

⚠ The scheduled time is the time the import is added to your Operations queue. Depending on how busy your queue is, the import may or may not be complete at that exact time.

Settings

Unknown macro: 'multiexcerpt-include-macro'

Notification

Notification

Here you can enable an email confirmation to be sent to the recipient(s) of your choice once the import is complete.

| Overview | Settings | Options | Schedule | **Notification** | File Source |

If you want confirmation that your imports are being performed at the indicated times and sent to the appropriate people, check the **Enable Email Notification** box and provide email addresses in the fields below. You can provide more than one email address separated by commas.

Operators specified in the **Email Notification To** field will be sent confirmation that the import was performed.

☑ Enable Email Notification

Email Notification To [   ]

Run

Settings

📄 Unknown macro: 'multiexcerpt-include-macro'

File Source

File Source

You can import new or update existing records from a database stored on an FTP server. The options in this tab allow you to specify the (secure) FTP server URL and username/password credentials so Textbook Tracker can locate the import file. An FTP server is required for imports to be scheduled.

Choose File Settings

Protocol

The protocol is set to *Choose File* by default. You can click the dropdown menu to select to import your file via FTP or FTPS, detailed below, or continue with this selection.

Choose File

Click here to locate the import file on your computer.

Field Mapping

Use the Field Mapping dialog to specify where to import the data by mapping the fields in your database to the fields in the source data you're importing. Read Field Mapping for more information.

Save

Whenever you make changes to your saved import that you intend to keep, remember to click **Save** before you leave the tab.

Run

Ready, set, lets go! Your file will be imported and a summary file will be logged in Operations Management.

FTP/FTPS Settings

Protocol

    Click here to choose FTP or FTPS (secured by SSL).

Host

    Enter the host name or IP address of the FTP server without the URL protocol, such as *myserveraddress.com.*

Port

    By default, FTP runs over port 21 and FTPS runs over port 990. You can manually enter a different port, if necessary.

Path

    Enter the full path to the file, including directories and the filename, such as */directory/subdirectory/filename.txt.*

Username and Password

    Enter your FTP login credentials. If your FTP server is configured to allow anonymous connections, the username and password may not be necessary.

Field Mapping

    Use the Field Mapping dialog to specify where to import the data by mapping the fields in your database to the fields in the source data you're importing. Read Field Mapping for more information.

Save

    Whenever you make changes to your saved import that you intend to keep, remember to click **Save** before you leave the tab.

Run

    Ready, set, lets go! Your file will be imported and a summary file will be logged in Operations Management.

ⓘ

FTP, short for File Transfer Protocol, is a set of rules (language) used to transfer files between computers on a network, such as the internet. There are two computers involved in an FTP transfer: a server and a client. An FTP client is an application that allows you to upload, download, and otherwise manage files stored on the FTP server. There are several FTP clients available for free, such as FileZilla and Cyberduck.