Quick Items Import

Operations

Import

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Quick Items Import
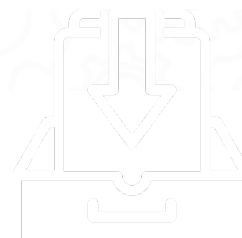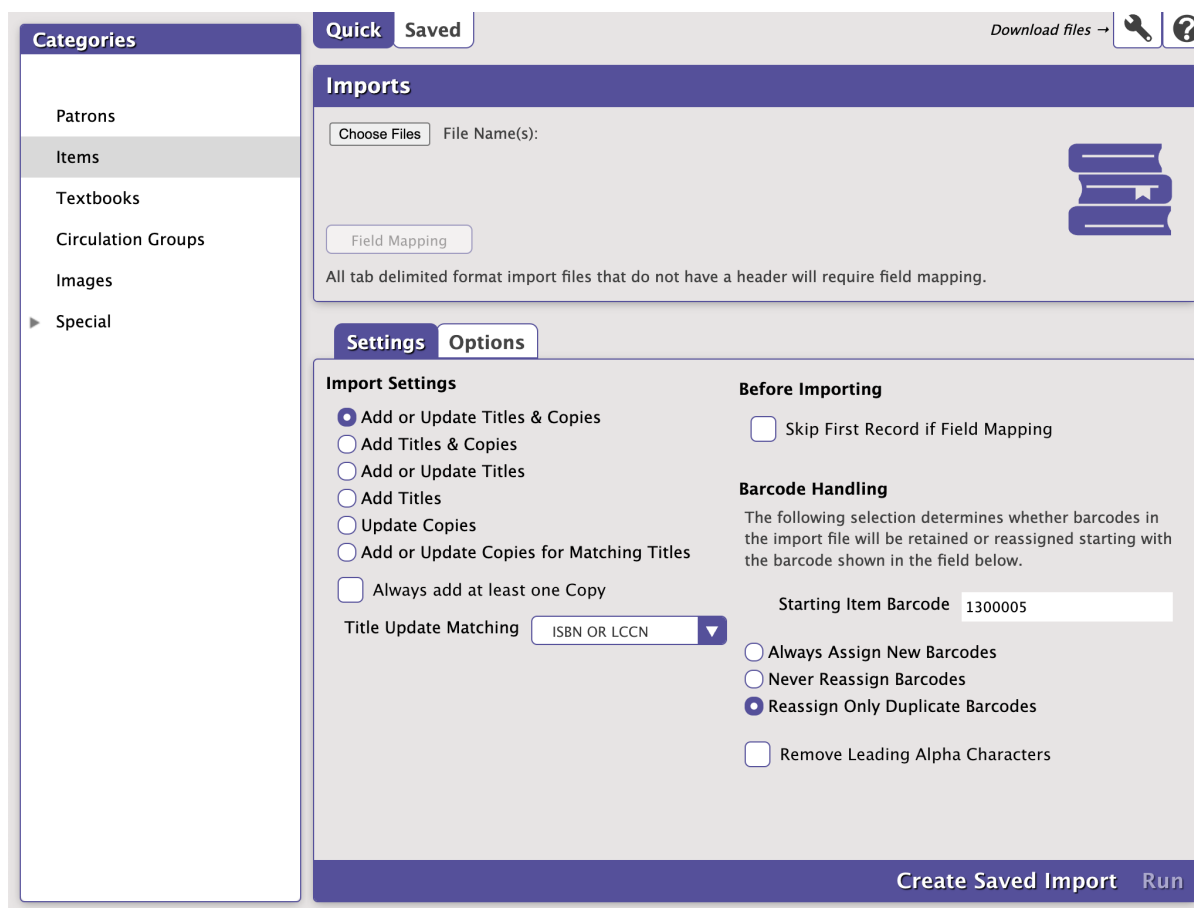
Settings

ⓘ this page and all tabs has been moved to https://support. goalexandria.com/operations/import/import-items/

Settings

⚠ While importing, Alexandria looks for a header that contains a file designation of "FT01" to specify item information

The Import window's Item Settings tab allows you to configure how title and copy information is imported into your database. This document covers the features of both Quick and Saved versions of the Item Settings tab, although some options may appear in one and not the other.

Categories	Quick Saved	Imports	Download files → 🔧 ❓

Categories

- Patrons
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Quick | **Saved**

Download files →

Imports

Choose Files   File Name(s):

Field Mapping

All tab delimited format import files that do not have a header will require field mapping.

Settings | **Options**

Import Settings

- ⦿ Add or Update Titles & Copies
- ○ Add Titles & Copies
- ○ Add or Update Titles
- ○ Add Titles
- ○ Update Copies
- ○ Add or Update Copies for Matching Titles
- ☐ Always add at least one Copy

Title Update Matching [ISBN OR LCCN ▼]

Before Importing

☐ Skip First Record if Field Mapping

Barcode Handling

The following selection determines whether barcodes in the import file will be retained or reassigned starting with the barcode shown in the field below.

Starting Item Barcode [1300005]

- ○ Always Assign New Barcodes
- ○ Never Reassign Barcodes
- ⦿ Reassign Only Duplicate Barcodes
- ☐ Remove Leading Alpha Characters

Create Saved Import   **Run**

Choose File

For item imports, Alexandria accepts MARC, MicroLIF, and other tab-delimited formats, including .txt, .tab, .tsv, .mrc, .mlif, .001, and .dat.

✓ **Drag and drop**

Drag an import file from your computer and drop it in the Imports pane for a quick and easy import!

Import Settings

- **Add or Update Titles & Copies.** Used to Add and Update Title and Copy Records during import. Copy records can be updated, but ONLY if they "belong" to the associated Title Record.

- **Add Titles & Copies.** Used to Add Title and Copy Records. Neither Title or Copies can be updated with this setting.

- **Add or Update Titles.** Used to add or update Title Records. Import Data for copy related fields is ignored, however copy barcode data may be used for matching a Title by copy barcode.

- **Update Copies.** Used to modify existing Copy Records. Title fields are ignored. Select this option to modify Copy data in your collection based on the Copy Barcode.

- **Add or Update Copies for Matching Titles.** Used to Add or Update Copy Records for specific Titles. Valid for Tab Delimited import data. If no copy fields are included in import records this is logged and the import is terminated.

- **Always add at least one copy.** This setting is used to automatically add at least ONE copy for every Title updated or added during the import. This option specifies that at least ONE new copy is always added when the Title is added or modified. If one or more copies are added when the title is added or modified, additional copies are NOT added. The next available barcode is used when adding a Copy. This checkbox is ONLY enabled for: Add Titles; Add or Update Titles, Add Titles & Copies, Add or Update Titles & Copies — otherwise it's disabled and ignored.

- **Title Update Matching.** Selects the Title Update Matching Rules. Of course Title Matching is only used when the Import Rule needs it i.e. Add or Update Titles & Copies or Add or Update Titles. NOTE: Title matching is an 'exact' match and includes 245_a and 245_b.
  - ISBN or LCCN & Title
  - ISBN or LCCN & Title & Title Call Number
  - Title & Author & Medium
  - Title & Author & Medium & Title Call Number
  - Copy Barcode

Barcode Handling

The following selections determine whether the barcodes in your import file will be retained or reassigned starting with the barcode number shown in the field below.

- **Staring Item Barcode.** If a new item barcode number is required, Alexandria will assign numbers beginning with the value you enter in this field. Alexandria always checks first to see if a barcode is already in use, and if it is, a new barcode number is automatically selected.

  - **Always Assign New Barcodes.** When selected, all item barcodes are reassigned using the Starting Item Barcode number (above). If you know for sure that your vendor assigned "dummy" barcode numbers with your MARC records, you'll want to use this option to force Alexandria to assign new barcode numbers according to the Next Barcode setting in your Patron Defaults preferences.

  - **Never Reassign Barcodes.** When checked, trying to add Copy Data with duplicate barcodes causes the imported record to be ignored. Use this setting if you want existing Copy Data to be updated.

  - **Reassign Only Duplicate Barcodes.** When checked, any barcodes that are duplicates of barcodes that already exist within your Alexandria database will be reassigned. This is the default setting.

- **Remove Leading Alpha Characters.** When checked, any barcodes being imported (or assigned on import) that start with alpha characters (i.e. letters of the alphabet) will have the starting letters removed before barcodes are saved. The default setting is Off.

Options
Options

Title tab

Title • Copy

Imports

Quick | **Saved**

Download files →

Choose Files   File Name(s):

Field Mapping

All tab delimited format import files that do not have a header will require field mapping.

Settings | **Options**

Title | Copy

Title Data Defaults

Title Policy   [Standard Item ▼]   ☐ Use Call Number Policy Mapping

☐ Replace MARC Records on Title Match

Create Saved Import   Run

Categories

Patrons

Items

Textbooks

Circulation Groups

Images

▶ Special

Settings

- **Title Policy.** Select the policy to be applied to the items you're importing.

- **Use Call Number Policy Mapping.** When checked, any call numbers within the call number range specified in your Policies preferences window will be assigned to that particular item policy. Please review the Policies and Call Number Mapping preference sections for more information.

- **Replace MARC Records on Title Match.** When selected, the tags in MARC records less than (or equal to) 839 will be completely replaced.

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Copy tab

Imports

Choose Files   File Name(s):

Field Mapping

All tab delimited format import files that do not have a header will require field mapping.

Patrons

Items

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▶ Special

Settings **Options**

Title Copy

Copy Data Defaults

Site	COMP – COMPanio... ▾	☐ Only Import Copies With Site Code: COMP
Copy Location		☐ Only Import Copies With This Copy Location
Copy Shelving		
Funding Source		
Vendor		
Copy Policy	Standard Item ▾	☐ Use Call Number Policy Mapping
New Copy Status	Default ▾	

Create Saved Import   Run

Settings

- **Site**. If the site code for the record you're importing isn't specified, this value is assigned to the 852_a tag in its place.

- **Copy Location**. If the location code for the record you're importing isn't specified, this location value is assigned to the 852_b tag in its place.

- **Copy Shelving**. If the second location code for the record you're importing isn't specified, this location value is assigned to the 852_c tag in its place.

- **Vendor**. If the vendor code for the record you're importing isn't specified, this value is assigned to the 852_1 tag under a specially-formatted subfield.

- **Item Policy**. If the record you're importing doesn't have an item policy defined, the policy you select from this drop-down menu will be used. Default is Standard Item.

- **Funding Source**. If the funding code for the record you're importing isn't specified, this source value is assigned to the 852_1 tag under a specially-formatted subfield.

Optional Checkboxes

- **Only Import Items With Site Code.** When checked, copy data is ignored where the 852_a site code doesn't match the current library identification code specified in the Sites Management window. When there is no 852_a information, it is assumed to be the local collection code. When unchecked, all copies are imported—no matter what the 852_a tag contains.

- **Only Import Items With Copy Location.** When this box is checked, only information with your Data Station's Copy Location code (or no location code) is imported. All other library codes are ignored.

- **Use Call Number Policy Mapping.** When checked, any call numbers within the call number range specified in your Policies preferences window will be assigned to that particular item policy. Please review the Policies and Call Number Mapping preference sections for more information.

- **Set New Copies As 'In Processing'.** There are times when items are imported into Alexandria, but they are not ready for the shelf. For example, sites that purchase MARC records from a vendor need to be imported before your operators can finish processing the books. Checking the Set New Copies As 'In Processing' box allows you to change the copy status of all items being imported from Available to In Processing. Later, you can run a utility to automatically change the copy of the items to Available.

Step by Step

Step-by-Step Instructions

Import Item Records

Item records may be imported in MARC, MicroLIF, or tab-delimited formats.

1. Log in to the Alexandria Imports module by adding **/imports** to the end of your login URL.
2. Select **Items** as your import type from the **Categories** pane.
3. Click **Choose File**, located in the **Import Selection Quick** pane; this allows you to locate and select a file to import using your operating system standard explorer window.
4. Once the item import file has been highlighted, click **Open** to prepare it for import.
5. Click on the items Settings tab; these settings determine what changes are made to a item data file on import. During import, if Alexandria detects an item barcode that is less than three alphanumeric digits, it will pad the beginning of the barcode with Xs. For example, if you are importing an item with the barcode of "7", then Alexandria will automatically import it as "XX7".
6. If the item import file is recognized, Alexandria will automatically sort, organize, and match the information to the correct, specified fields. If the item import file is missing a header, it will not be recognized; Alexandria will ask you to set your item field mapping in order to proceed.
7. Click the Field Mapping button; when the Field Mapping dialog appears, you may match data in the item import file to specific Alexandria fields. Data from the import file is shown on the left-hand of the window while Alexandria field names are shown on the right-hand side.
8. Items are imported in sequential order; use the white up and down arrows to correctly align the fields of the import file. Click on a field to exclude it from the import. See Import Field Mapping for more information on the fields that can be imported.
9. When you have finished matching Alexandria fields to the information in your file, click the Set button.
10. Click **Run** to send the item import to the Operations Management queue.
11. During import, in the Operations Management interface, a progress bar is shown; click **Cancel** to stop the import.
12. Every import performed or canceled will be documented in the Show My Operations log in Operation Management.