Saved Items Import

Operations

Import

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Saved Items Import

Last Updated: $action.dateFormatter.formatDateTime($content.getLastModificationDate())

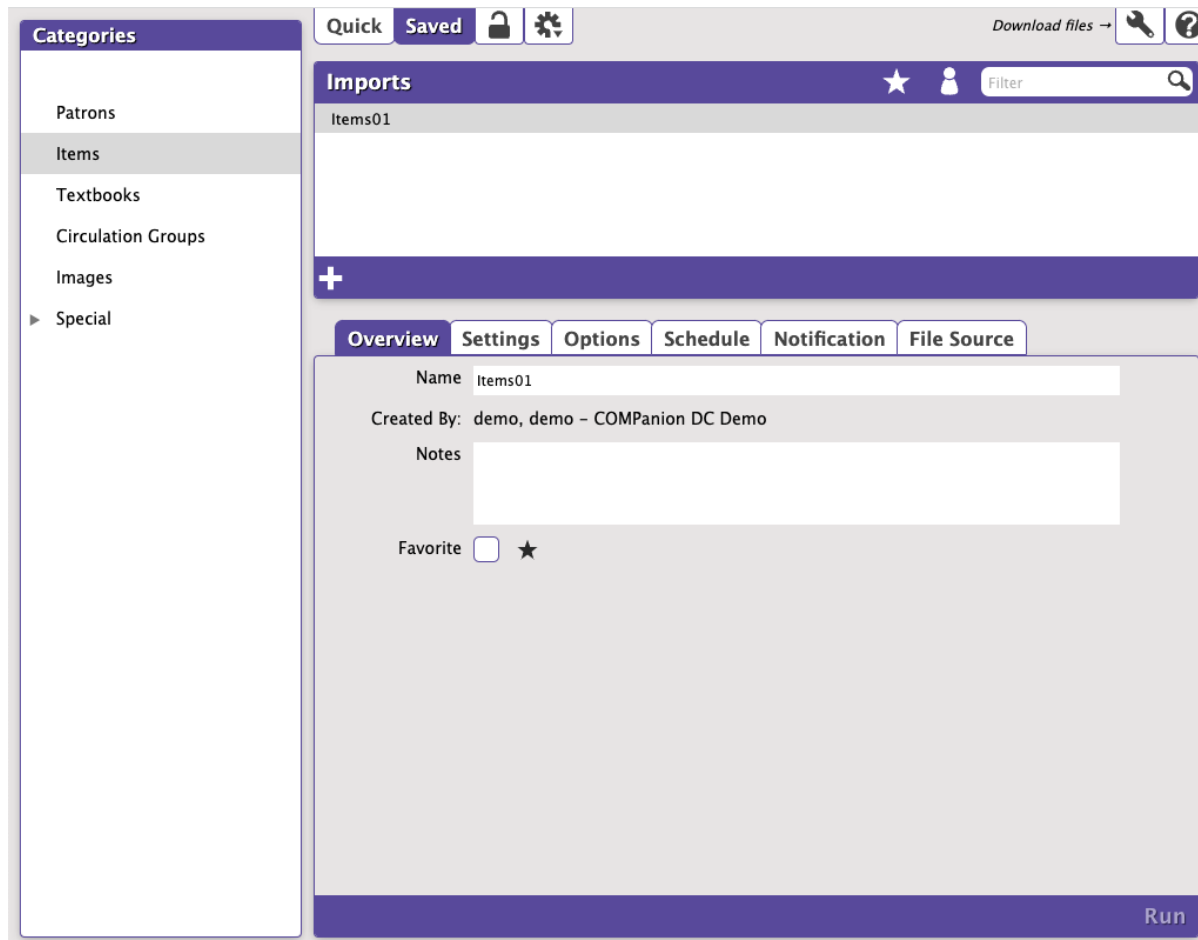## Overview

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

Overview

The Overview tab is a brief summary of the file list and default settings that are to be used for the currently selected (i.e. highlighted) scheduled import in the Advanced tab. The contents of the Overview tab change depending on the import you have selected.

Settings

- **Name.** Provide or edit the name of your Saved import here.

- **Created.** Displays the name and site ID code of the operator who created the Saved import. It cannot be edited.

- **Notes.** Provide general usage notes about the import here (e.g. Only perform this import at the end of each month!).

- **Favorite.** Save this import to your favorites list for easy access.

Settings

Settings

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.

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.

Before Importing

- **Skip First Record if Field Mapping.** When checked, Alexandria will not import the first record in the import file; this is generally done when the initial record of your import file contains an unrecognized header. This setting will ignore recognized COMPanion headers so that they are properly imported.

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.

> ⚠️ While importing, Alexandria looks for a header that contains a file designation of "FT01" to specify item information (E.g. *###*FT01 /fieldnumber/fieldnumber.../ <return>*).

Options
Options

Schedule

Schedule

The Schedule tab—useful only for Saved imports—is comprised of a fairly straightforward layout full of simple, time-saving features. For instance, let's say that you wanted to run a certain import every Friday at 5:00am. Using the Frequency drop-down menu, select Weekly; from the On drop-down menu, select Friday; finally, using the At fields, enter 5 and AM.

> ⚠ 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.

- **Schedule**. Check this box to unlock the Saved report scheduling capabilities.

- **Frequency**. This drop-down menu allows you to specify how often you would like to repeat your Saved report. You can select Once, Daily, Weekly, Monthly, Yearly from this drop-down menu. Secondary On options may dynamically appear, depending on your selection.

  - **Once**. This options allows you to use the Date Picker "" to select a date.
  - **Daily**. There are no secondary options available for this selection.
  - **Weekly**. This selection will repeat the report every week on a Monday—Sunday of your choosing.
  - **Monthly**. This selection will repeat the report once a month on a specific day—from the 1st through the 31st—of your choosing.
  - **Yearly**. This selection (limited to one year) will repeat the report once a year on a specific month and day of your choosing.

- **At**. Use these fields to select the hour, minute, and ante/post-meridiem to run your report.

Notification
Notification

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. For example: johndoe@examplelibrary.com

You can provide more than one email address separated by commas. For example: *johndoe@examplelibrary.com,janedoe@examplelibrary.com*

Operators specified in the Email Notification and Link To field will be sent confirmation and a link to download the original import file; those in the Email Notification To field will only be sent confirmation that the import was performed.

Settings

- **Enable Email Notification**. Check this box if you want to enable email notification, sent upon import completion.

- **Email Notification To.** Provide the email address(es) Alexandria will send a notification to when the import has completed. Separate multiple email addresses with commas.

File Source
FTP

Alexandria can import new (or update existing) patrons from a record database stored on an FTP server. These options allow you to specify the (secure) FTP server URL and username/password credentials. If you find yourself uncertain what an FTP server actually is, it's essentially just a software application that uses the File Transfer Protocol (i.e. FTP), a protocol used for sharing files over the internet. There are several FTP server software packages available that you can download and use for free.

Settings

- **Protocol**
  - **FTP.** Import your file over FTP without encryption.
  - **FTPS.** Import your file over FTP with SSL-based encryption.
  - **Choose File.** Choose a file to import from your computer. This protocol cannot be scheduled.
- **Host.** Enter the host name or IP address of the FTP-accessible server. For example, *myserveraddress.com*. Don't worry about including the URL protocol/scheme (e.g. ftp://); it will be automatically appended before the host name, depending on your Protocol selection (above).

- **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, including filename and directories. For example, */directory/subdirectory/filename.txt*

- **Username and Password.** Provide a clear-text authentication and sign-in protocol in the form of a username and password. If your FTP server is configured to allow it, you can connect anonymously without having to enter anything.

- **Field Mapping.** Click this button to open the Patrons/Items/Circulation Groups Field Mapping window.
  - Alexandria automatically recognizes file headers created by other COMPanion software to correctly import files without you knowing anything about the contents of the data. Field Mapping is required for all tab-delimited import files that do not have a header.
  - Patrons and items are imported in sequential order. Use the white up and down arrows to correctly order the fields of the import file. Click the green checkmark on an individual field to exclude it from the import.
  - See Import Field Mapping for more information.

- **Delete File(s) after Processing.** When left unchecked, the file will not be removed (deleted) from the FTP directory after it has been successfully imported. It will be left on the server for processing by other applications or Data Stations.

Use FTP and Saved Patron Imports as a Patron Server

It can be difficult for administrators to keep up with changing patron populations over a vast network of Alexandria Data Stations. With our shared import FTP functionality, an entire patron record database can be stored in one central location and every Alexandria Data Station—once configured—can import new (or update existing) patrons as they become available.

How Does This Work?

Most school districts use administrative software with centralized student information management; this software has the ability to export an entire student population, which can then be transferred from one host and stored on an FTP server over a TCP-based network.

Once the patron file has been transferred to a shared FTP server (and with the proper administrative permissions), patron data can then be imported or exported to any Alexandria Data Station.

⚠ If several sites import from a shared directory, it is *absolutely essential* to have your FTP settings accurately configured! For instance, if *none* of your sites except *one* has **Delete Files(s) After Processing** checked, *that* school will cause the shared import file to be erased after import!

One bad apple can essentially spoil the whole bunch.

For this reason, we recommend that you consider having an IT professional(s) configure your scheduled FTP imports and/or prohibit specific **Import and Export** settings for certain **Security Groups**.

Further, if you're using the **FTP** selection to schedule imports for files other than patron records (e.g. MARC record imports) we recommend that you create independently named subdirectories for each file type being imported.

For example, your URL might be: `ftp://myserveraddress.com/directory/subdirectory/`.

If you don't specify a particular file to import, Alexandria will import every file it discovers in the shared FTP directory; even if multiple files exist in the directory—they will all be processed and imported separately. For example, if the URL you provide does not contain a specific file name (e.g. ftp://myserveraddress.com/directory/subdirectory/), then all files located within that directory are imported. However, if the URL you provide does include a file name (e.g. ftp://myserveraddress.com/directory/subdirectory/filename.txt), then only the file that matches that name will be imported.

Once a file has been successfully imported, it will be left on the server for processing by other Data Stations unless you have the Delete Files(s) After Processing option checked; then, the file will be removed (deleted) from the FTP directory.

So that you don't import patrons/items from sites other than your own, only patron/item records that match your current Site Code will be imported. Additionally, if you have the This is a Shared Patron Import option checked, the program will only import new patron records; this is determined by matching internal Site Codes and checking filenames and file creation/modified dates.