Loading Approval Records into NZ

Last Update 9/26/2016; Created by the YBP EOCR Record Loads in Alms Group

You will use the New Order import profile when loading these records. Settings in the last three tabs will vary by institution (i.e. Inventory Information, PO Line Information, Mapping). Waiting to load these records until after OCLC holdings are set, enables you to match on the proper OCLC record in the NZ.

This document covers

- Worldcat Cataloging Partners setup
- Import Profile Settings for loading Approval Plan records
  - Profile Details
  - Normalization and Validation
  - Match Profile
    - Other Considerations
    - Set Management Tags
    - Inventory Information
    - PO Line Information
    - Mapping

Worldcat Cataloging Partners setup

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 for approval loads.

The following example shows how to specify the vendor data to include in MARC records. Yours
may vary:
Import Profile Settings for loading Approval Plan records

Profile Details

Normalization and Validation
**Match Profile**

The difference from a brief record download is matching using the Unique OCLC Identifier Match Method. If holdings have been set in OCLC, then the presumption is that the records have been loaded into the NZ during the daily OCLC load and are the records to attach to the approval orders.

**Other considerations:**

- **Handling Method:** If you choose “Automatic,” 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.

**OPTIONAL SETTINGS (Automatic multi-matches handling):**

- **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.

- **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): 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:** This is optional. If you select this option, 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.

- **Prefer record with same inventory type:** 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. See this document for an explanation of how this option works.

- **“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 have the option to manually handle them during the load. 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 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 choose the Suppress records/s from publish/delivery. See policy: Suppression of Records for Physical Inventory.

Inventory Information

Settings will vary by institution
PO Line Information

Required

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

Settings will vary by institution
There are no Alliance recommendations for mapping setup. This mapping feature is useful when you need to map incoming values from vendors that might not exist in Alma. An example might be during switching of fund codes. You can map old fund codes in YBP records to the new Alma fund codes.