



V-Smart Air

Bulk Addition of Items

eJournals and eBooks

Topic Note

Release 5.0 SP4



Document Type: Topic Note

Title: Bulk Addition of Items – eJournals and eBooks
Release: 5.0 SP4

Version number: 1.0
Date: 3rd February 2022
Prepared by: Connie Young

Change History:

Date	Version	Name	Change Description
3 rd Feb. 2022	1.0	Connie Young	Initial document for HEE/SWIMS (Incident 15886606)

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1 Introduction

This document outlines the requirements and workflow for the addition of items to existing records, in response to Incident 15886606:

We bulk upload a number of collections. Each time a new subscriber joins, we do not want to have to mass delete and bulk upload the entire collection again for a couple of key reasons: 1) this interferes with reading lists; 2) some of our subscribers only subscribe to part of the collection, so their records have to be manually added; and 3) we only have so many ER barcodes at our disposal.

We need a way that we can add item records (and specify all the details e.g., location, classmarks, item category etc in advance) to an existing savelist. This will give us an easy way to add new subscriber item records.

After consultation the following workflow was designed:

- ◆ Create a savelist of those titles to which a new subscriber will require access.
- ◆ Using **AFO132 – Output to file** and the export profile *MinExport*, export these records to create a MARC Exchange file that will be reloaded back into the system.
- ◆ In **AFO131 – Input from file** you then reload the exported records:
 - For non-KBART eJournal records you will use the *AddSubscriber* input profile which will match the incoming 035/\$a against the *Previous System Number* index, an index of the 035 \$a from the MARC record.
 - For KBART eJournal records you will use the *AddSubscriberK* input profile which will match the incoming 022/\$a against the *MISSN* index which is an index of just the 022/\$a from the MARC record. (Note: Testing of an additional matching index was not successful.)
 - For eBook records you will use the *AddSubscribereBook* input profile which will match the incoming 035/\$a against the *Previous System Number* index, an index of the 035 \$a from the MARC record.

To accomplish this, you will need:

- ♦ **AFO134 – Conversions**
 - *MinExport* profile, that will export only the 022/\$a, 035/\$a, 245/\$a, and 362/\$a.
 - *AddSubscribers* profile, that will create an item for the new subscriber location using the 362/\$a as the cutter for the new item.
 - *AddSubscriberseBooks* profile, that will create an item for the new subscriber location using all default information.

- ♦ **AFO114 – Record matching**
 - *ADDSUB* – that will use the *Previous System Number* index to match incoming records based on the value in the 035/\$a of the incoming record and has the following actions:
 - 0 Matches – New
 - 1 Match – Update
 - >1 Match – New
 - *SUBISSN* – that will use the *MISSN* index to match incoming records to existing records based on the value in the 022/\$a of the incoming record and has the following actions:
 - 0 Matches – New
 - 1 Match – Update
 - >1 Match – New

- ♦ **AFO115 – Record merging**
 - *ADDSUB* – that will discard all incoming bibliographic data.

- ♦ **AFO133 – Input/output profiles**
 - *MinExport* export profile, that uses the *MinExport* conversion profile and does not export any item records.
 - *AddSubscriber* import profile, that uses the *ADDSUB* matching profile to match incoming records, the *ADDSUB* merging profile to discard all incoming bibliographic information and the *AddSubscribers* conversion profile to create an item record for matched records for the new subscriber location.
 - *AddSubscriberK* import profile, that uses the *SUBISSN* matching profile to match incoming records, the *ADDSUB* merging profile to discard all incoming bibliographic information and the *AddSubscribers* conversion profile to create an item record for matched records for the new subscriber location.
 - *AddSubscribereBook* import profile, that uses the *ADDSUB* matching profile to match incoming records, the *ADDSUB* merging profile to discard all incoming bibliographic information and the *AddSubscriberseBooks* conversion profile to create an item record for matched records for the new subscriber location.

2 Requirements


2.1 AFO134 – Conversions



The screenshot displays the MinExport application interface. At the top, there is a title bar with the text "MinExport" in green. Below the title bar is a toolbar containing several icons: a back arrow, a save icon, a copy icon, a pencil (edit), a trash can, a double-headed arrow, a single-headed arrow, a question mark, a play button, and a clipboard. Below the toolbar are two tabs: "Commands" and "Tools". The main content area lists various configuration options for conversion rules. The list starts with a comment: "Comment=Minimal export for ejournals to add items". It then includes a "Copy all=" option, a "Conditions" section, and a "Conversion" section. Under "Conversion", there are four main entries, each representing a different field:

- 022 \$a**:
 - Condition=
 - Action condition=
 - Target field=022
 - Source field=022
 - Source occurrence=
 - Keep source order=0
 - Use rules from=
 - Indicator 1
 - Indicator 2
 - \$a
- 035 \$a**:
 - Condition=
 - Action condition=
 - Target field=035
 - Source field=035
 - Source occurrence=
 - Keep source order=0
 - Use rules from=
 - Ind 1
 - Ind 2
 - \$a
- 245 \$a**:
 - Condition=
 - Action condition=
 - Target field=245
 - Source field=245
 - Source occurrence=
 - Keep source order=0
 - Use rules from=
 - Ind 1
 - Ind 2
 - \$a
- 362 \$a**:
 - Condition=
 - Action condition=
 - Target field=362
 - Source field=362
 - Source occurrence=
 - Keep source order=0
 - Use rules from=
 - Ind 1
 - Ind 2
 - \$a

AddSubscribers

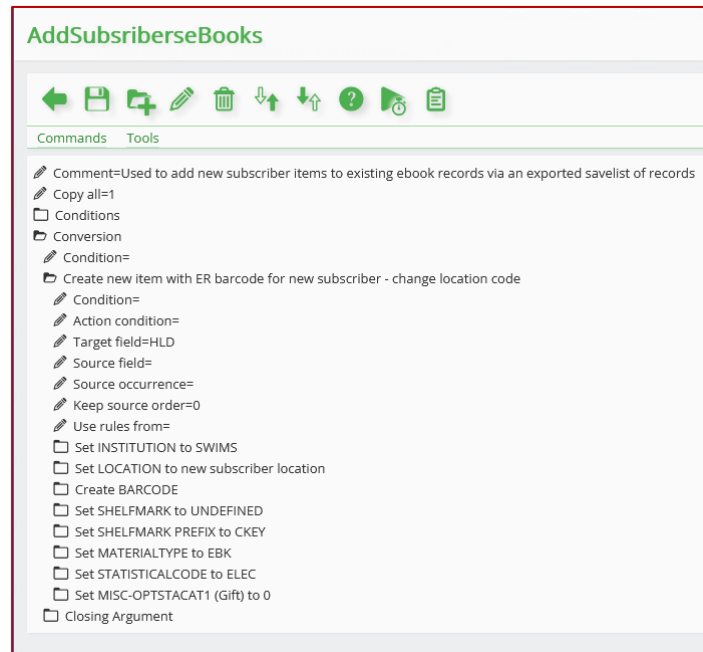


Commands Tools

- Comment=Used to add new subscriber items to existing ejournal records via an exported savelist of records
- Copy all=1
- Conditions
- Conversion
 - Condition=
 - Store 362 \$a in CUTTER
 - Condition=
 - Action condition=
 - Target field=
 - Source field=362
 - Source occurrence=1
 - Keep source order=0
 - Use rules from=
 - Store \$a i CUTTER
 - Create TOR with ER barcode
 - Condition=
 - Action condition=
 - Target field=HLD
 - Source field=
 - Source occurrence=
 - Keep source order=0
 - Use rules from=
 - Set INSTITUTION to SWIMS
 - Set LOCATION to FRM
 - Create BARCODE
 - Set SHELFMARK PREFIX to WILEY
 - Set SHELFMARK to UNDEFINED
 - Set MATERIALTYPE to EJNL
 - Set MISC-OPTSTACAT1 (Gift) to 0
 - Set STATISTICALCODE to EJNL
 - Set CUTTER to 362 \$a
 - Rule
- Closing Argument

Note:

This conversion profile may need to be either copied to create multiple versions or edited prior to each use so that items are created for the correct location of the subscriber. If there is more than one location that is subscribing to the same list of titles, then you can add additional instruction to this profile so that items are created for multiple locations at the same time.



The screenshot shows a software interface for configuring a conversion profile named "AddSubscribereBooks". At the top, there is a title bar with the name of the profile. Below the title bar is a toolbar with various icons for navigation and editing. The main area is divided into two tabs: "Commands" and "Tools". The "Commands" tab is active, showing a list of configuration options for the conversion profile. The options include:

- Comment=Used to add new subscriber items to existing ebook records via an exported savelist of records
- Copy all=1
- Conditions
- Conversion
 - Condition=
 - Create new item with ER barcode for new subscriber - change location code
 - Condition=
 - Action condition=
 - Target field=HLD
 - Source field=
 - Source occurrence=
 - Keep source order=0
 - Use rules from=
 - Set INSTITUTION to SWIMS
 - Set LOCATION to new subscriber location
 - Create BARCODE
 - Set SHELFMARK to UNDEFINED
 - Set SHELFMARK PREFIX to CKEY
 - Set MATERIALTYPE to EBK
 - Set STATISTICALCODE to ELEC
 - Set MISC-OPTSTACAT1 (Gift) to 0
 - Closing Argument

Note: This conversion profile may need to be either copied to create multiple versions or edited prior to each use so that items are created for the correct location of the subscriber. If there is more than one location that is subscribing to the same list of titles, then you can add additional instruction to this profile so that items are created for multiple locations at the same time.

2.2 AFO114 – Record matching

114 : Matching profile

Name: ADDSUB

Application: Bib

Comment: Used by the AddSubscriber and AddSubscriberBook Input Profiles to match content of 035 \$a against the Previous System Number Index. New - Update - New.

ADDSUB [Bib]

No.	Index or matching file	Action 0 matches	Action 1 match	Action more matches
<input type="checkbox"/> 1	Index - Previous System Number [Olibrecordno]	New	Update	New

114 : Matching profile

Name: SUBISSN

Application: Bib

Comment: Used by the AddSubscriberK Input profile to match content of 022 \$a against the Matching ISSN Index. New - Update - New

SUBISSN [Bib]

No.	Index or matching file	Action 0 matches	Action 1 match	Action more matches
<input type="checkbox"/> 1	Index - Matching ISSN Index [Missn]	New	Update	New

2.3 AFO115 – Record Merging

115 : Merging profile 🏠 🌐 📄 ⚙️ 🌟 🗨️ 📅 🔄

☰ ⬅️ ✓️ ? 🧑

Name	ADDSUB
Format	MARC21/B
Comment	Used by the AddSubscriber, AddSubscriberK and AddSubsribereBook Input profiles to discard all incoming bibliographic data.

ADDSUB			
No.	Field	Action	Subfields for comparison
<input type="checkbox"/>	1	*	Discard

2.4 AFO133 – Input/output profiles

133 : Export profile : MinExport

General

Character set of external data: Ansi

Language for language-dependent fields: « All languages »

Code of field with record-id: 001

Code of subfield with record-id:

Record format conversion: MinExport

Character for start of non-filing part: 0

Character for end of non-filing part: 0

Maximum program errors for conversion: 10

Code of field with version date/id:

Additional character conversions:

133 : Export profile : MinExport

Format

File format: ISO2709

Record delimiter: 29

Field delimiter: 30

Subfield delimiter: 31

Include authority links in the form:

Include bibliographic links in the form:

133 : Export profile : MinExport

Items

Select institutions for item export (*=all):

Export data for stack requests:

Apply item category holdback criteria on export:

The *AddSubscriber* input profile is for the matching of non-KBART based records and eBook records, it uses the *ADDSUB* Matching profile to match the incoming 035/\$a against the *Previous System Number* index.

133 : Import profile : AddSubscriber

General Format Input Save lists Items FTP or Web Service

Character set of external data Ansi

Language for language-dependent fields « All languages »

Code of field with record-id

Code of subfield with record-id

Record format conversion AddSubscribers

Character for start of non-filing part 0

Character for end of non-filing part 0

Maximum program errors for conversion 999

Code of field with version date/id

Additional character conversions

133 : Import profile : AddSubscriber

General Format Input Save lists

File format ISO2709

Record delimiter 29

Field delimiter 30

Subfield delimiter 31

133 : Import profile : AddSubscriber

General Format Input Save lists

Matching profile ADDSUB

Merging profile ADDSUB

Rebuild relations when merging

Database HEE Main catalogue

Default template Sage

Maximum errors in record 999

Maximum program errors for import 999

Maximum program errors for load 999

Set record modification status to Modifications allowed

Set record delete status to Deletion allowed

Set record status to

If data match rejected form Link to main heading

Note: If required, you could change the *Default template* prior to using this input profile.

133 : Import profile : AddSubscriber

General	Format	Input	Save lists	Items
User for save lists (* = current user)	*			
Savelist for not loaded records	ADDSUBNL			
- Suffix for save list	Date			
- If save list exists	Add to savelist			
Savelist for loaded records	ADDSUB			
- Suffix for save list	Date			
- If save list exists	Add to savelist			
Savelist for matched records	ADDSUBM			
- If save list exists	Add to savelist			
- Suffix for save list	Date			
Savelist for records without match	ADDSUBNM			
- If save list exists	Add to savelist			
- Suffix for save list	Date			

Note: If required, you could change the savelist names prior to using this input profile.

A second Input profile – *AddSubscriberK* – is for the matching of KBART based records which uses the *SUBISSN* Matching profile to match the incoming 022/\$a against the *MISSN* index.

133 : Import profile : AddSubscriberK

General	Format	Input	Save lists
Matching profile	SUBISSN		
Merging profile	ADDSUB		
Rebuild relations when merging	<input checked="" type="checkbox"/>		
Database	HEE Main catalogue		
Default template	Sage		
Maximum errors in record	999		
Maximum program errors for import	999		
Maximum program errors for load	999		
Set record modification status to	Modifications allowed		
Set record delete status to	Deletion allowed		
Set record status to			
If data match rejected form	Link to main heading		

133 : Import profile : AddSubscriberK

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General	Format	Input	Save lists	Items	FTP or Web Service
User for save lists (* = current user)	*				
Savelist for not loaded records	ADDSUBKNL				
- Suffix for save list	Date				
- If save list exists	Add to savelist				
Savelist for loaded records	ADDSUBK				
- Suffix for save list	Date				
- If save list exists	Add to savelist				
Savelist for matched records	ADDSUBKMATCH				
- If save list exists	Add to savelist				
- Suffix for save list	Date				
Savelist for records without match	ADDSUBKNOMATCH				
- If save list exists	Add to savelist				
- Suffix for save list	Date				

A third Input profile – *AddSubscribereBook* – is for the matching of ebook records, it also uses the *ADDSUB* Matching profile to match the incoming 035/\$a against the *Previous System Number* index.

133 : Import profile : AddSubscribereBook

General	Format	Input	Save lists	Items	FTP or Web Service
Matching profile	ADDSUB				
Merging profile	ADDSUB				
Rebuild relations when merging	<input checked="" type="checkbox"/>				
Database	HEE Main catalogue				
Default template	Sage				
Maximum errors in record	999				
Maximum program errors for import	999				
Maximum program errors for load	999				
Set record modification status to	Modifications allowed				
Set record delete status to	Deletion allowed				
Set record status to					
If data match rejected form	Link to main heading				

133 : Import profile : AddSubscribereBook

General	Format	Input	Save lists	Items	FTP or Web Service
User for save lists (* = current user)	*				
Savelist for not loaded records	ADDSUBBKNNL				
- Suffix for save list	Date				
- If save list exists	Add to savelist				
Savelist for loaded records	ADDSUBEBK				
- Suffix for save list	Date				
- If save list exists	Add to savelist				
Savelist for matched records	ADDSUBBKMATCH				
- If save list exists	Add to savelist				
- Suffix for save list	Date				
Savelist for records without match	ADDSUBBKNO MATCH				
- If save list exists	Add to savelist				
- Suffix for save list	Date				

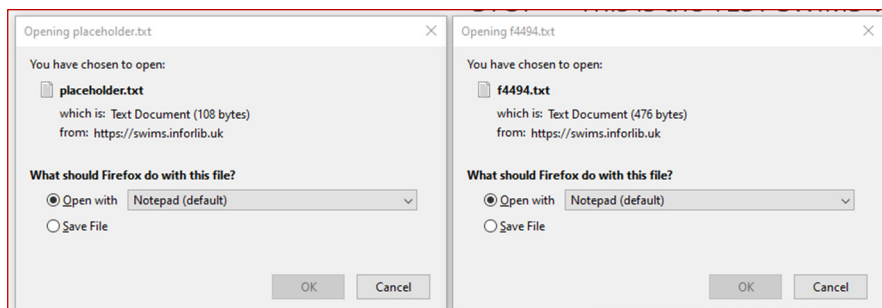
3 Workflow

The general workflow will be as follows:

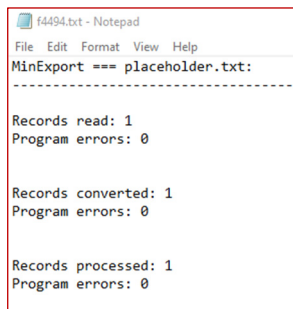
1. Create a savelist of the bibliographic titles to which the new location wishes to subscribe.
2. In **AFO132 – Output to file**, use this savelist and the *MinExport* output profile to export the records.

In the **Output to file** field select an existing .txt or .mrc file to be used as the initial output file name. This file can exist locally or on your network. You should always run this step in **Online** mode.

This will produce two output files. Note that they may initially display one on top of the other. Also, the below screen shots are from V-smart being run under Firefox. The location of the result files may differ when running V-smart under Chrome or Edge.



The .txt file will contain a summary of the process and the record count for each step.

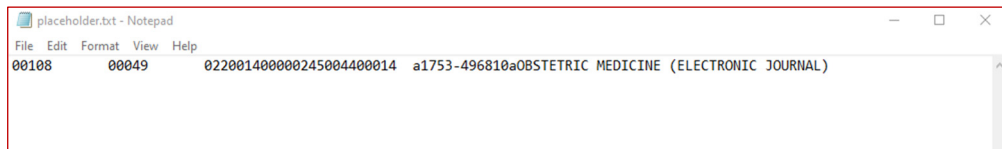


```
f4494.txt - Notepad
File Edit Format View Help
MinExport === placeholder.txt:
-----
Records read: 1
Program errors: 0

Records converted: 1
Program errors: 0

Records processed: 1
Program errors: 0
```

The .txt or .mrc file will contain the MARC exchange file for the exported savelist records and will have been given the name chosen in the **Output to file** field earlier in the process.



```
placeholder.txt - Notepad
File Edit Format View Help
00108 00049 022001400000245004400014 a1753-496810aOBSTETRIC MEDICINE (ELECTRONIC JOURNAL)
```

You should now choose the **File > Save as** option and save this output file under a different name – this is the file that we will use in the next step, so make sure you know where you save it and what name you give it.



```
NewTORSubTitles.txt - Notepad
File Edit Format View Help
00108 00049 022001400000245004400014 a1753-496810aOBSTETRIC MEDICINE (ELECTRONIC JOURNAL)
```

3. In **AO131 – Input from file**, use the *AddSubscriber*, *AddSubscriberK* or *AddSubscribereBook* input profile to reload the records just exported. If a single match is found the system will discard the incoming bibliographic record and create a new item record for the subscriber location(s) as specified in the *AddSubscribers* or *AddSubscribereBook* conversion profile. If no match, or more than 1 match is found then a new brief record with item(s) will be created and you will need to manually move the item(s) from this record to the correct record after the load is complete.

131 : Database loader

Input from file: NewTORSubTitles.txt

Load profile: AddSubscriber

First record: 1

Last record: 99999999

Import:

Conversion (if defined):

Load:

Flip authority headings:

Skip indexing:

Test database load:

Clean up workfiles:

Stop automatic loading at (HH:MM):

In the **Input from file** field, select the file that you created in the previous step. Always run this step in **Online** mode.

131 : Process management : start job

Import records

Start process: Online
 Batch
 Memory

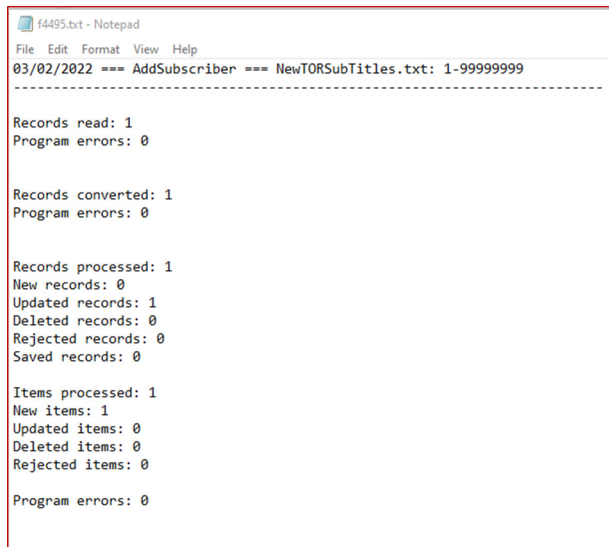
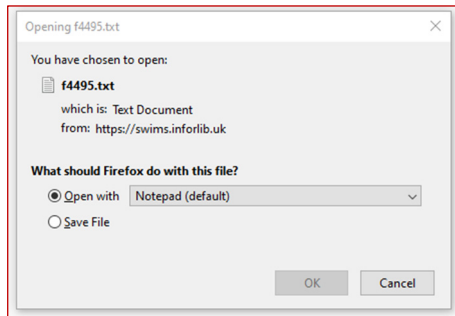
File transfer

The requested file could not be found on the server: NewTORSubTitles.txt

Browse... NewTORSubTitles.txt

Select the file on your workstation and press OK to send it.

This will then produce a summary report as follows:



And the system will create savelists as instructed which can then be accessed via **AFO141 – SSP Management > Savelists:**

<input type="checkbox"/>	No.	Application	Savelist name	Sorted list	Status	Date	Comments	Number of records
<input type="checkbox"/>	1	Bibliographic descriptions	ADDSUB.220203	Sorted	Open	03/02/2022	AddSubscriber	1
<input type="checkbox"/>	2	Bibliographic descriptions	ADDSUBM.220203	Sorted	Open	03/02/2022	AddSubscriber	1
<input type="checkbox"/>	3	Bibliographic descriptions	ADDSUBNM.220203	Sorted	Open	03/02/2022	AddSubscriber	0
<input type="checkbox"/>	4	Workfile bibliographic descriptions	ADDSUBNL.220203	Sorted	Open	03/02/2022	AddSubscriber	0