

Bibliographic Import/Replace Profiles

Scope: This document explains the various profiles used by operators to import bibliographic records into the Voyager database from the utilities.

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Profile Name	Profile Code	Dupl. Handling	Cancel-lation	Dupl. Repl.	Dupl. Warn	Field Definitions (Match Points)	Merge Fields/Overrides	Field Weight
Acq Conditional	ACQCON	Add-Conditional	None	49	49	010A, 019A, 020N, 020R, 022A, 022Z, ISB3	N/A	50 (all)
BBID Merge Only	BBIDMERG	Merge	None	49	49	BBID	035, 856, 899, 902, 906, 948, 950, 995	50
BIBReplace	BIBREPL	Replace	None	49	49	BBID	N/A	50
Import Conditional	IMPCON	Add-Conditional	None	49	49	010A, 019A, 020N, 020R, 022A, 022Z, 0350, 2450, ISB3	N/A	50 (all)
Import Unconditional	IMPUNCON	Add-Unconditional	None	60	60	035A	N/A	50
CJKScriptMerge	CJKMERGE	Merge	None	49	49	0350	035, 902, 903, 948, 957	50
ISBNtesting	ISBNTST	Add-Conditional	None	49	49	020N, 020R, ISB3	N/A	50 (all)
LCReplace (in RD SysAdmin)	LCREPL	Replace	None	49	49	010A	N/A	50
MARCadia Merge	MARCME RG	Merge	None	49	49	BBID	541, 6XX, 856, 899, 902, 903, 906, 948, 950, 957, 976	50
MarciveMerge	MCVMERGE	Merge	None	49	49	0350	035, 520, 653, 899, 902, 903, 948, 950, 975	50
MarciveMerge2	MCVMERGE2	Merge	None	49	49	010A	035, 520, 653, 856, 902, 903, 948, 950, 975	100
Merge	MERGE	Merge	None	49	49	0350	035, 505, 520, 653, 853, 854, 855, 856, 863, 864, 865, 899, 902, 903, 905, 906, 948, 949, 950, 957, 975, 980, 981	50
Merge Only	MERGEONL	Merge	None	49	49	0350	035, 856, 899, 902, 903, 906, 948, 950, 995	50
MIT Conditional	MITCON	Add-Conditional	None	49	49	0350	N/A	50
NetLibConditional	NETCON	Add-Conditional	None	49	49	0350	N/A	50
NetLibMerge	NETMERGE	Merge	None	49	49	0350	035, 902, 903, 948, 950, 995	50
Overlay	OVERLAY	Replace	None	49	49	0350	N/A	50
PQDMerge	PQDMERGE	Merge	None	49	49	0350	856, 899, 902, 903, 948, 950	50
Recon Conditional	RECONCON	Add-Conditional	None	49	49	010A, 020N, 022A, 0350, ISB3	N/A	80/60/60 /100
SerSolMerge	SERMERGE	Merge	None	49	49	035A	Field Override=001 Subfield Override= 035a Merge Fields=035, 050, 070, 082, 090, 600, 610, 611, 630, 648, 650, 651, 653, 655, 899, 902, 906, 948, 950	100

PROFILE DEFINITIONS AND USES:

Acq Conditional:

Module: Acquisitions

Function: This profile compares the bib record the operator is trying to import with a bib in the existing database against the following fields:

010A (LCCN)

019A (OCLC Number : Cancelled)

020A (ISBN)

020Z (ISBN : Cancelled/Invalid)

022A (ISSN)

022Z (ISSN : Cancelled)

035 (SYSTEM NUMBER)

ISB3 (ISBN-13s will match ISBN-10s)

While importing records to add to a purchase order in Acquisitions, the following will happen:

If any of these fields in an imported record exactly matches any of the same fields on an existing record, the operator will receive a message that the record was not added because a duplicate exists, and will be offered the option of linking the line item being created to the existing bib.

Notes: Records detected as duplicates ***should not*** be linked to purchase orders. The operator should instead leave these records in the Import file and import them again in the Cataloging module, where they can be compared to the record(s) detected as (a) duplicate(s). After the operator has determined whether the imported record actually matches items in the database and imported the records as appropriate in Cataloging, s/he can return to Acquisitions and add the items to the purchase order being created using the "Bib Search" function.

Acq Import Conditional is the default profile in the Acquisitions module, and should only be used by operators in that module. The profile is selected as a default in System Administration rather than on individual workstations.

BBID Merge Only

Module: Bulk Import

Function: This profile is used when one wishes to load only those records already existing in Voyager. The profile matches on the entire 001 field in the bibliographic record, discarding any new records and overlaying matches. To be used when confident that only unique 001 fields are present.

Merge fields:

035A (System number)

856 (Electronic location and access)

899 (Aggregator or special collection)

902 (Donor information)

906 (Local access restrictions)

948 (Local statistics and markers)

950 (Local call number)

995 (Export decision)

Notes: To be used only in consultation with Batch Processing supervisor.

BIB Replace

Module: Bulk Import

Function: This profile is used to reload records extracted from Voyager for batch maintenance purposes. Matches on: BBID (Voyager BIB ID)

Notes: Used only with Bulk Import. Target records are extracted from Voyager, pre-processed, then reloaded.

Import Conditional

Module: Cataloging

Function: This profile compares the bib record the operator is trying to import with a bib in the existing database against the following fields:

010A (LCCN)

019A (OCLC Number : Cancelled)

020A (ISBN)

020Z (ISBN : Cancelled/Invalid)

022A (ISSN)

022Z ISSN : Cancelled

0350 (System Number)

2450 (Title Statement)

ISB3 (ISBN-13s will match ISBN-10s)

With Import Conditional as the default profile in the Cataloging module, the following will happen:

If any of these fields exactly matches the corresponding fields in an existing record, the system will block the import. The Bibliographic Dedupe Detection window will open, and the existing bib will be highlighted in that window. The operator will have the following options: backing out of the import attempt, overlaying the record, or merging the record (see [Overlay](#) and [Merge](#) below). [Note that dup detection can be overridden at any time by clicking the "Add as duplicate" button in the upper-right corner of the window.]

Notes: Import Conditional should be the default profile for all operators in Cataloging, and will be used for the vast majority of operator-initiated imports. This profile is designed to serve two purposes: to act as a limited safeguard against duplicate record creation, and to permit operators to match records for targeted overlay. To minimize both interference with the workflow and the impact on system performance, the profile relies primarily on standard numbers for its comparisons. Not every duplicate or potential duplicate will be detected. In addition, some records that are not duplicates may be detected as such when they match the 245 exactly. This profile is *not* a substitute for careful searching of the database. Operators cannot rely on the profile to exclude all duplicate records. Operators will also need to examine records detected as duplicates carefully to determine whether they do in fact match exactly.

In the Cataloging module, this profile is selected under Options--General, and needs to be done on a client-by-client basis.

Import Unconditional

Module: Cataloging

Function: This profile allows an operator in the Cataloging module to add a record without any duplicate checking. Import Unconditional could be useful when the operator is aware that a match may be encountered, but wishes to add the record anyway. An example might be adding a record for an electronic version of a serial when a print version is already in the database.

Notes: Import Unconditional is not designed to be used as a default profile setting. The field definition given in the table above is intended primarily as a placeholder in the Voyager System Administration module, where some value has to be added for the profile to exist. If an operator does use Import Unconditional as the default profile setting, all records being imported will be saved to the database without duplicate detection of any kind.

CJK Script Merge

Module: Bulk Import

Function: This profile is used for batch import of our CJK records from RLIN.

Matches on: 0350 (RLIN System Number)

Merge fields:

0350 (System Number)

902 (Donor information)

903 (Large scale digitization information)

948 (Local statistics and markers)

957 (Migrated ACQ information)

Notes: Used only with Bulk Import.

LC Replace

Module: Bulk Import

Function: This profile is used in loading updates to the LC Resource File. It compares LCCNs of incoming BIB records with those of existing records, overlaying updates to existing records and loading non-matches as new. Matches on: 010A (LCCN)

Notes: Used to load records in the Resource Database (RD) only.

MARCadiaMerge

Module: Bulk Import

Function: This profile is used to reload MARCadia upgrades of our In Process and CIP-level records into the production database.

Matches on: BBID (Voyager BIB ID)

Merge fields:

541 (Immediate source of acquisition note)

653 (Uncontrolled index term)

856 (Electronic location and access)

899 (Local aggregator or special collection)

902 (Donor information)

903 (Large scale digitization information)

906 (Local access restrictions)

948 (Local statistics and markers)

950 (Local call number)

957 (Migrated ACQ information)

976 (Item information - basic bibliographic unit)

Notes: Vendor retains 035, 950, 955 from exported records. USED FOR BULK IMPORT ONLY.

Marcive Merge Profiles

Module: Bulk Import

Function: These profiles are used load new and updated Marcive records for government documents.

Matches on:

0350 (System number for de-duping -- MCVMERGE)

010A (LCCN -- MCVMERG2)

Merge fields for MCVMERGE:

035 (System number)

520 (Scope and general contents note)

653 (Uncontrolled index term)

899 (Local aggregator or collection)

902 (Donor information)

903 (Large scale digitization information)

948 (Local statistics or markers)

950 (Local call number)

975 (Genre Term)

Merge fields for MCVMERG2:

035 (System number)

520 (Scope and general contents note)

653 (Uncontrolled index term)
856 (Electronic location and access)
902 (Donor information)
903 (Large scale digitization information)
948 (Local statistics or markers)
950 (Local call number)
975 (Genre Term)

Notes: Non-matches are loaded as new. USED FOR BULK IMPORT ONLY.

Merge

Module: Cataloging

Function: With Import Conditional as the default import/replace profile, Merge is one of the options available to the operator upon detection of a duplicate record. Merge can be used to retain certain information on an existing record (e.g., fuller contents notes for a multipart monograph, important locally-defined fields), while overlaying all other fields.

Merge fields:

035 (System number)
505 (Formatted contents note)
520 (Scope and general contents note)
653 (Uncontrolled index term)
853 (Captions and pattern - Basic bibliographic unit)
854 (Captions and pattern - Supplementary material)
855 (Captions and pattern - Indexes)
856 (Electronic location and access)
863 (Enumeration and Chronology - Basic Bibliographic Unit)
864 (Enumeration and Chronology - Supplementary material)
865 (Enumeration and Chronology - Indexes)
899 (Local aggregator or collection)
902 (Donor information)
903 (Large scale digitization information)
905 (NOTIS migration date)
906 (Local access restrictions)
948 (Local statistics or markers)
949 (Local processing information)
950 (Local call number)
957 (Migrated ACQ information)
975 (Genre term)
980 (Vendor data)
981 (Vendor/fund data)

Notes: If the record being imported contains any of the defined merge fields, those fields will be retained in the merged record, not overlaid; the information retained from the target record will be added to the information in the incoming record. For example, if both the incoming record and the target record have a 505 field, and the operator chooses to merge the records, both 505s will appear on the final record. The record will need to be edited appropriately after the merge is complete.

Merge is not designed to be used as a default profile setting. The field definition given in the table above is intended primarily as a placeholder in the Voyager System Administration module, where some value has to be added for the profile to exist. If an operator does use Merge as the default profile setting, only records that match exactly on the 035 field will overlay existing items, and will do so *without* Dup Detection. If none of the fields listed above is on the existing record, Merge will function exactly like Overlay.

Merge Only

Module: Bulk Import

Function: This profile is used when one wishes to load only those records already existing in Voyager. The profile matches on the entire 035 field in the bibliographic record, discarding any new records and overlaying matches. To be used when confident that only unique 035 fields are present.

Merge fields:

035 (System number)

856 (Electronic location and access)

899 (Local aggregator or collection)

902 (Donor information)

903 (Large scale digitization information)

906 (Local access restrictions)

948 (Local processing information)

950 (Local call number)

995 (Export decision)

Notes: To be used only in consultation with Batch Processing supervisor.

MIT Conditional

Module: Bulk Import

Function: This profile is used when batch loading MIT CogNet records. It compares the 035 field of incoming records with those of existing records, discarding matches and loading non-matches as new.

Matches on: 0350 (MIT system number)

Notes: USED FOR BULK IMPORT ONLY

NetLibConditional and NetLibMerge

Module: Bulk Import

Function: These profiles are used in loading new and updated netLibrary records into the production database.

NetLibConditional compares 035 fields in incoming records with those of existing records, discarding matches, and loading non-matches as new.

Matches on: 0350 (System number for de-deduping)

NetLibMerge compares 035 fields in incoming BIB records with those of existing records, merging updates to matching existing records, and loading non-matches as new.

Matches on: 0350 (System number for de-deduping).

Merge fields:

035 (System number)

902 (Donor information)

903 (Large scale digitization information)

948 (Local statistics or markers)

950 (Local call number)

995 (Export decision)

Notes: USED FOR BULK IMPORT ONLY

Overlay

Module: Cataloging

Function: With Import Conditional as the default import/replace profile, Overlay will be one of the operator options upon detection of a duplicate record. Overlay can be used to overlay (or replace) an incomplete or lower quality bib record with a complete or superior one.

Notes: Overlay is not designed to be used as a default profile setting. The field definition given in the table above is intended primarily as a placeholder in the Voyager System Administration module, where some value has to be added for the profile to exist. If an operator does use Overlay as the default profile setting, only records that match exactly on the 035 field will overlay existing items, and will do so *without* Dup Detection.

Overlay is available only in the Cataloging module. Acquisitions staff who need to overlay a bib record would need to do so in Cataloging.

ProQuest Merge

Module: Bulk Import

Function: This profile is used for batch import of our ProQuest update records.

Matches on: 035 (MiAaPQ)

Merge fields:

856 (Electronic location and access)

899 (Local aggregator or collection)

902 (Donor information)

903 (Large scale digitization information)

948 (Local statistics or markers)

950 (Local call number)

Notes: Used only with Bulk Import.

Recon Conditional

Module: Bulk Import

Function: This profile is used when importing recon records from OCLC. It compares the 010, 020, 022, and/or 035 of incoming records with those of existing records, discarding matches and loading non-matches as new.

Matches on:

010A (LCCN)

020A (ISBN)

022A (ISSN)

0350 (OCLC system number)

ISB3 (ISBN-13s will match ISBN-10s)

Notes: USED FOR BULK IMPORT ONLY

Serial Solutions Merge

Module: Bulk Import

Function: This profile is used for batch import of our Serial Solutions update records.

Matches on: BBID (Voyager BIB ID)

Merge fields:

035 (System number)

050 (LC call number)

070 (National Agricultural Library Call Number)

082 (Dewey Decimal Classification Number)

090 (Local call number)

600 (Subject added entry - Personal name)

610 (Subject added entry - Corporate name)

611 (Subject added entry - Meeting name)

630 (Subject added entry - Uniform title)

648 (Subject added entry - Chronological term)

650 (Subject added entry - Topical term)

651 (Subject added entry - Geographic name)

653 (Uncontrolled index term)

655 (Index term - Genre/form)

899 (Local aggregator or collection)

902 (Donor information)

906 (Local access restrictions)

948 (Local statistics or markers)

950 (Local call number)

Notes: Used only with Bulk Import.