

Keeping Local Collections Up to Date



Goal of this Training:

Learn a workflow to manage local electronic collections when the content of those collections changes periodically based on content added or removed by the vendor.

Workflow:

Use import profiles to import new MARC records and remove MARC records for content that is no longer available

New Content Added to the Collection: Import New Records with an Import Profile

Download new MARC records from the administrative dashboard provided by the vendor

<http://admin.films.com/AdminLogin.aspx>

The screenshot shows the Infobase Admin dashboard. The top navigation bar includes the Infobase Admin logo, a menu icon, and links for Sign Out, Help, and Email. The main content area is titled 'My Resources' and features a 'Films On Demand' section. This section includes a description of the service, a subscription expiration date of 6/30/2020, and an 'Open Product' button. Below the description is a row of buttons: Reports, Legacy Reports, Usage Boosters, My Content, MARC Records (highlighted with a red box), and Suppression. A 'Product Settings' button is located below the 'MARC Records' button. The left sidebar contains links for My Resources, Users, Account Settings, and Usage Boosters.

Infobase Admin

GENESEO
THE STATE UNIVERSITY OF NEW YORK

SUNY Geneseo

My Resources

Films On Demand

Subscription Expires on 6/30/2020

Open Product

Films On Demand is a comprehensive, curriculum-focused video subscription providing unlimited access to thousands of videos in 30+ subjects, including the humanities, science, business, literature, health, and more. Professors can stimulate and reinforce their lectures, and students can find inspiration and materials for their research. New content is added regularly.

Reports Legacy Reports Usage Boosters My Content **MARC Records** Suppression

Product Settings

My Resources

Users

Account Settings

Usage Boosters

Films On Demand

- Summary
- Reports ▾
- Legacy Reports ▾
- Usage Boosters
- My Content ▾
- MARC Records
- Suppression
- Product Settings ▾

Download New Records

Download 38 Records

Last Download: **12/4/2019**

Download all new MARC records since your last download.

Download All Records

Download 37,395 Records

Download all MARC records for your account.

Download Discontinued Records

Download 3,280 Records

Last Download:

Download all discontinued MARC records since your last download.

Download Custom Records

Create Custom Records

Follow the instructions to create a custom MARC record file.

Previously Downloaded Files

MARC File	Description	Date Added	Title Count	Status	Download
▼NewRecords_16099_1_12-10-2019.mrc	New Records file	12/10/2019	38	Downloaded: 12/10/19	
▼AllRecords_16099_12-04-2019.mrc	All Records file	12/4/2019	37,355	Downloaded: 12/04/19	

Run the existing Films on Demand Import Profile Job to load the new records

Resources → Import → Manage Import Profiles

Import Profiles

Monitor ImportsBack

InstitutionNetworkCommunity

1 - 6 of 6Profile nameQ

+ Add New Profile

Profile type : All

ID	Status	Profile name	Profile description	Profile Type	Contributed by	
1 714377150004833	Active	Films On Demand Import Profile MARC	-	Repository	-	...
2 13087800000231	Active	Load Bib Records without order informati...	Load Bib Records without order informati...	Repository	-	...
3 13087810000231	Active	Load Local Authority Records	Load Local Authority Records	Initial Authority	-	...
4 13088290000231	Active	New Electronic Book Order	New Electronic Book Order	New Order	-	...
5 13101680000231	Active	New Order Electronic	-	New Order	-	...
6 13087820000231	Active	New Order of Physical Material - Yankee ...	New Order of Physical Material - Yankee ...	New Order	-	...

Edit

View

History

Run

Copy

Contribute


Delete

Upload the MARC file from the vendor

Click Submit to start the job

Select File ▾

File *



NewRecords_16099_1_12_10_...
(111.05 KB)

NewRecords_16099_1_12_1

Label

Notes

Add

< Start New Import

Films On Demand Import Profile MARC

Profile Type Repository

Files List

1 - 1 of 1

Select File ▾



File Name	Label	Notes	Source	Size	Date	
1 NewRecords_16099_1_...	-	-	-	237 KB	12/10/2019	...

Cancel

Submit



The file may have been split into multiple smaller ones according to the number of records.

Films On Demand Import Profile MARC - NEW RECORDS

Profile Description -
Status Active

Profile Type
Repository

1 - 1 of 1

All ▾



Refresh



Filter : All ▾

▼ Job ID	↕ Status	↕ User	↕ Time Started	↕ Time Ended	Files Processed
1 742009120004833	Initialization Process	NUTH	2019-12-10 05:58:38	-	0% <div><div></div></div> <div>...</div>

Check the Monitor Jobs list to check the status of the job

Monitor Jobs

Scheduled

Running

History

1 - 20 of 59

Job details

Q

Refresh

Job Category : All

Status : All

Submit Date Range

12/09/2019 - 12/10/2019

X

	Name	Job ID	Job Category	Operator	Submit Date	Start Date	End Date	Status	
1	Schedule of Analytics reports and dashboards - Daily	74201384...	Analytics	System	12/10/2019 06:00:08 EST	12/10/2019 06:01:49 EST	12/10/2019 06:01:59 EST	Completed Successfully	
2	Publishing to OCLC - Bibliographic Records	74201378...	Publishing	System	12/10/2019 06:00:07 EST	12/10/2019 06:00:07 EST	12/10/2019 06:06:40 EST	Completed Successfully	
3	Notifications - Send Due Date Reminders	74201369...	Fulfillment	System	12/10/2019 06:00:06 EST	12/10/2019 06:00:06 EST	12/10/2019 06:02:08 EST	Completed Successfully	
4	Metadata Import: Films On Demand Import Profile MARC - NEW RECORDS	74200912...	Import	NUTH	12/10/2019 05:58:38 EST	12/10/2019 05:58:38 EST	12/10/2019 05:58:55 EST	Completed Successfully	

Check the portfolios to verify the records loaded correctly

Electronic collection ▾

Keywords ▾

films on demand

✕ 🏠 ▾

🔍

Advanced ▾

Electronic Collections (1 - 1 of 1) [films on demand](#)

Save Query

🏠 Institution

👤 Network

👤 Community

Sort by : Rank ▾

🔗 ⚙️

1 🏠 **Films on Demand**

Portfolio List (74625)

Edit Collection

...

Type: Selective package
Services: Full Text (Available)
Creation Date: 12/04/2019 12:31:51 EST
Modification Date: 12/05/2019 09:55:06 EST
Collection ID:
6153789870004833

[Other details](#)

**Remove Discontinued or Otherwise
Unavailable Content from the Collection:
Delete Records with an Import Profile**

Materials Needed:

- MARC records of removed content from the vendor
 - Records must have (and will likely have) a d in LDR position 5
- Import profile to delete records from the electronic collection

Download discontinued MARC records from the administrative dashboard provided by the vendor

<http://admin.films.com/AdminLogin.aspx>

The screenshot shows the Infobase Admin interface. The top navigation bar includes the Infobase Admin logo, a menu icon, and links for Sign Out. The left sidebar contains navigation links for My Resources, Users, Account Settings, and Usage Boosters. The main content area is titled 'My Resources' and features a 'Films On Demand' section. This section includes a product card with the Films On Demand logo, a description of the video subscription service, and a row of action buttons: Reports, Legacy Reports, Usage Boosters, My Content, MARC Records (highlighted with a red box), and Suppression. A 'Subscription Expires on 6/30/2020' notice and an 'Open Product' link are also present.

Infobase Admin

GENESEO
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My Resources

Films On Demand

Subscription Expires on 6/30/2020

Open Product

Films On Demand is a comprehensive, curriculum-focused video subscription providing unlimited access to thousands of videos in 30+ subjects, including the humanities, science, business, literature, health, and more. Professors can stimulate and reinforce their lectures, and students can find inspiration and materials for their research. New content is added regularly.

Reports Legacy Reports Usage Boosters My Content **MARC Records** Suppression

Product Settings

Films On Demand

- Summary
- Reports
- Legacy Reports
- Usage Boosters
- My Content
- MARC Records
- Suppression
- Product Settings

Download New Records

Download 46 Records

Last Download: **12/10/2019**

Download all new MARC records since your last download.

Download All Records

Download 37,441 Records

Download all MARC records for your account.

Download Discontinued Records

Download 3,280 Records

Last Download:



Download all discontinued MARC records since your last download.

Download Custom Records

Create Custom Records

Follow the instructions to create a custom MARC record file.

Previously Downloaded Files

MARC File	Description	Date Added	Title Count	Status	Download
▼Delete_16099_12-12-2019.mrc	Delete file	12/12/2019	3,280	Downloaded: 12/12/19	
▼Delete_16099_12-12-2019.txt	Delete file	12/12/2019	3,280	Downloaded: 12/12/19	

Create an import profile for deleted MARC records by copying the existing import profile for all records

Resources → Import → Manage Import Profiles

Import Profiles

Monitor ImportsBack

InstitutionNetworkCommunity

1 - 6 of 6Profile nameAdd New Profile

Profile type : All

ID	Status	Profile name	Profile description	Profile Type	Contributed by	
1 714377150004833	Active	Films On Demand Import Profile MARC	-	Repository	-	...
2 13087800000231	Active	Load Bib Records without order informati...	Load Bib Records without order informati...	Repository	-	...
3 13087810000231	Active	Load Local Authority Records	Load Local Authority Records	Initial Authority	-	...
4 13088290000231	Active	New Electronic Book Order	New Electronic Book Order	New Order	-	...
5 13101680000231	Active	New Order Electronic	-	New Order	-	...
6 13087820000231	Active	New Order of Physical Material - Yankee ...	New Order of Physical Material - Yankee ...	New Order	-	...

Edit

View

History

Run

Copy

Contribute

Delete

Create a new profile name and set the status to Active

[<](#) Import Profile Details

Save DraftCancelSave

Profile DetailsNormalization & ValidationMatch ProfileSet Management TagsInventory Information

Profile Details

Use Network ZoneNo

Profile name *Films On Demand Import Profile MARC - DISCONTINUED RECORDS

Profile description

Originating system *Films Media Group

Import ProtocolUpload File/s

Physical source formatBinary

Encoding formatUTF-8

Source formatMARC21 Bibliographic

StatusActive

File name patterns

Cross walkYesNo

Target formatMARC21 Bibliographic

Match Actions

Handling method ☒ Automatic ☐ Manual

Upon match ☐ Merge ☐ Overlay ☒ Do Not Import ☐ Import New Record

Single match - match only record with the same inventory type (electronic/physical) ☐

MERGE/OVERLAY

Merge method **Overlay all fields but local**

Select Action ☒ Allow bibliographic record deletion

☐ Do not override/merge a record with lower brief version

☐ Unlink bibliographic records from community zone

☐ Do not override Originating System

Do not override/merge record with an older version ☒ Disabled ☐ Consider Originating System ☐ Ignore Originating System

In the Match Actions section of the Match Profile tab, make the following changes:

Upon Match: Do Not Import

Select Action:
Allow Bibliographic Deletion

In the No Match section of the Match Profile tab, select Do Not Import for Upon No Match.

Automatic Multi-Match Handling

Select Action

☒ Disregard matches for bibliographic CZ linked records

☒ Disregard invalid/canceled system control number identifiers

☐ Prefer record with the same inventory type (electronic/physical)

☐ Skip and do not import unresolved records

Handle Record Redirection

Canceled record field

Canceled record subfield

Canceled record

☒ Delete ☐ Suppress ☐ Keep it

Merge method

Overlay all fields but local

Update holdings call number

☐

No Match

Upon no match

☒ Do Not Import ☐ Import

In the Inventory Information tab, check the box to Delete/deactivate portfolios and click Save

< Import Profile Details Save Draft Cancel Save

Films On Demand Import Profile MARC - DISCONTINUED RECORDS i ✓

Profile Type Repository

Profile Details Normalization & Validation Match Profile Set Management Tags Inventory Information

Inventory Operations ✓

☒ Electronic ☐ Mixed ☐ Physical ☐ None

E-Book Mapping ✓

Delete/deactivate portfolios ☒

Portfolio type ☐ Standalone ☒ Part of an electronic collection

Electronic Collection * Films on Demand ✕ ⋮ 🔄

Service * Full Text ▼

Material type Streaming Video ▼

☐ Single portfolio ☒ Multiple portfolios

Use the ellipses to select Run and upload the file of deleted records from the vendor

< Import Profiles

Monitor Imports

Back

Institution

Network

Community

1 - 8 of 8

Profile name



+ Add New Profile



Profile type : All

ID	Status	Profile name	Profile description	Profile Type	Contributed by	
1 714377150004833	Active	Films On Demand Import Profile MARC	-	Repository	-	...
2 806432530004833	Active	Films On Demand Import Profile MARC - DI...	-	Repository	-	...
3 742009050004833	Active	Films On Demand Import Profile MARC - NE...	-	Repository	-	...
4 13087800000231	Active	Load Bib Records without order informati...	Load Bib Records without order informati...	Repository	-	...
5 13087810000231	Active	Load Local Authority Records	Load Local Authority Records	Initial Authority	-	...
6 13088290000231	Active	New Electronic Book Order	New Electronic Book Order	New Order	-	...
7 13101680000231	Active	New Order Electronic	-	New Order	-	...

Edit

View

History

Run

Copy

Contribute

Delete

Click Submit to start the job

Electronic portfolios ▾

Title ▾

⌂ ▾

🔍

Advanced ▾

[< Start New Import](#)

Cancel

Submit

Films On Demand Import Profile MARC - DISCONTINUED RECORDS ▾

Profile Type

Repository

Files List ▾

1 - 20 of 66

Select File ▾

📄

⚙️

	▲ File Name	↕ Label	Notes	↕ Source	↕ Size	↕ Date	
1	Delete_16099_12-12-2...	-	-	-	270 KB	12/12/2019	...
2	Delete_16099_12-12-2	-	-	-	250 KB	12/12/2019	...

Films On Demand Import Profile MARC - DISCONTINUED RECORDS

Profile Description	-	Profile Type	Repository
Status	Active		

1 - 1 of 1

All

Q

Refresh

Filter : All

Job ID	Status	User	Time Started	Time Ended	Files Processed
1 806433320004833	Pending	NUTH	-	-	0% <div></div>

Check the portfolios to verify the records were deleted correctly

Electronic collection ▾

Keywords ▾

films on demand

✕ 🏠 ▾ 🔍

Advanced ▾

Electronic Collections (1 - 1 of 1) [films on demand](#)

Save Query

🏠 Institution

👤 Network

👤 Community

Sort by : Rank ▾

🔗 ⚙️

1 🏠 **Films on Demand**

Portfolio List (74625)

Edit Collection

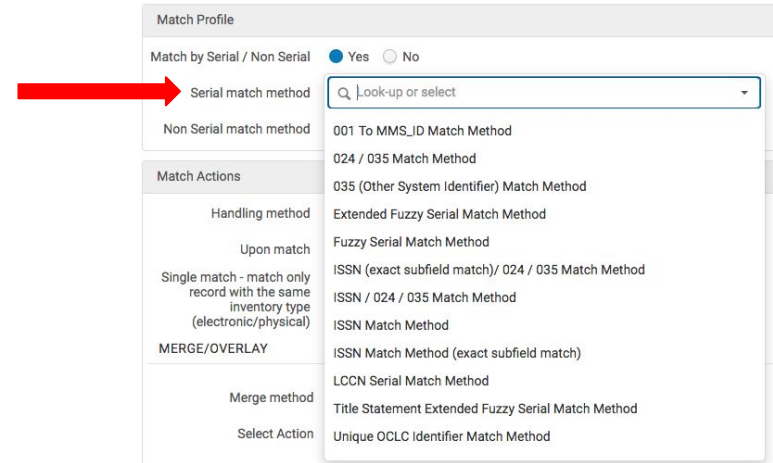
...

Type: Selective package
Services: Full Text (Available)
Creation Date: 12/04/2019 12:31:51 EST
Modification Date: 12/05/2019 09:55:06 EST
Collection ID:
6153789870004833

[Other details](#)

Troubleshooting Tips:

- The file type from the vendor must be .mrc
- Records from the vendor should already have the appropriate n or d in LDR position 5. If the job does not successfully add or delete records, it may be worth checking the records.
- The match must be exact in order for the job to run successfully. Depending on the vendor and records, the Serial Match Method (Match Profile) may vary. Films on Demand works best with Unique OCLC Identifier Match Method but records from another vendor may work better with 035 (Other System Identifier) Match Method



The screenshot shows the 'Match Profile' configuration window. A red arrow points to the 'Serial match method' dropdown menu, which is currently open, displaying a list of match methods. The 'Match by Serial / Non Serial' section has 'Yes' selected. The 'Match Actions' section shows 'Handling method' set to 'Single match - match only record with the same inventory type (electronic/physical)' and 'Merge method' set to 'MERGE/OVERLAY'. The 'Select Action' dropdown is also visible.

Match Profile	
Match by Serial / Non Serial	<input checked="" type="radio"/> Yes <input type="radio"/> No
Serial match method	<input type="text" value="Look-up or select"/>
Non Serial match method	
Match Actions	
Handling method	
Upon match	
Single match - match only record with the same inventory type (electronic/physical)	
MERGE/OVERLAY	
Merge method	
Select Action	

- 001 To MMS_ID Match Method
- 024 / 035 Match Method
- 035 (Other System Identifier) Match Method
- Extended Fuzzy Serial Match Method
- Fuzzy Serial Match Method
- ISSN (exact subfield match)/ 024 / 035 Match Method
- ISSN / 024 / 035 Match Method
- ISSN Match Method
- ISSN Match Method (exact subfield match)
- LCCN Serial Match Method
- Title Statement Extended Fuzzy Serial Match Method
- Unique OCLC Identifier Match Method

**Remove all MARC records in the collection and
import an entirely new batch of records**

Delete Portfolios job

First, create a set of all Films on Demand records. Save the set and use it to run the Delete Portfolios job.

The set of records can be created using a repository search, or by exporting a list of portfolios as an Excel file.

Notes:

The number of portfolios is large enough that the export will run as a job.

The file size limit for a set is 10 MB

The screenshot shows the 'General Information' form for creating a new set. The 'Set name' field is 'Films on Demand Portfolios' and the 'Set content type' is 'Electronic portfolios'. The 'Private' checkbox is checked. The 'Creation date' is '12/17/2019 15:44:44 EST' and the 'Updated by' is 'Ex Libris'. The 'Set ID' is empty. On the right, there are options for 'Set type' (Itemized), 'Status' (Active), 'Created by' (Ex Libris), and 'Content Origin' (Institution only). Below the form is the 'Add Contents from File to Set' section, which has a 'From File' radio button selected. A file named 'Films_on_Demand_portfolios_1.xlsx' (3.78 MB) is shown in the file selection area. A note on the right states 'The maximum file size is 10 MB.'

General Information

Set name * Films on Demand Portfolios

Description

Note

Set content type * Electronic portfolios

Private ☒ Yes ☐ No

Creation date 12/17/2019 15:44:44 EST

Updated by Ex Libris

Set ID -

Set type Itemized

Status ☒ Active ☐ Inactive

Created by Ex Libris

Content Origin ☒ Institution only ☐ Discovery

Add Contents from File to Set

☒ From File ☐ From Analytics

File

Films_on_Demand_portfolios_1.xlsx (3.78 MB)

The maximum file size is 10 MB.

Once all portfolios are removed (the job will take several hours), download a MARC file of all records from the vendor and import the records using the documentation created by Kristy Lee:

<https://slcny.libanswers.com/faq/260496>

<https://docs.google.com/document/d/1nTB71I9-WNwE06UpOyqsCMEWUw9dEArZS9cVhIPGSvY/edit>

Films On Demand

Summary

Reports ▾

Legacy Reports ▾

Usage Boosters

My Content ▾

MARC Records

Suppression

Product Settings ▾

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