Keeping Local Collections Up to Date

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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

Films On Demand

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

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

Cancel   **Submit**

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

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	...

Films On Demand Import Profile MARC - NEW RECORDS ⌄

Profile Description -	**Profile Type** Repository
Status Active	

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% ⋯	⋯

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

Monitor Jobs

Scheduled	Running	History

1 - 20 of 59   Job details ▾ [   ] 🔍   Refresh ⎆ ⚙

▼ Job Category : All ▾   Status : All ▾   Submit Date Range [12/09/2019 - 12/10/2019 ✕ 📅]

	⇕ 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

Films On Demand

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 Imports   Back

| Institution | Network | Community |

1 - 6 of 6   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	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

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.

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

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

Back

Films On Demand Import Profile MARC - DISCONTINUED RECORDS ⌄

| Profile Description | - | | Profile Type | Repository |
| Status | Active |

1 - 1 of 1   All ⌄   🔍   Refresh   ⟶   ⚙

🔽 Filter : All ⌄

	▼ Job ID	⬍ Status	⬍ User	⬍ Time Started	⬍ Time Ended	Files Processed		
1	806433320004833	Pending	NUTH	-	-	0% ...		...

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 ▾

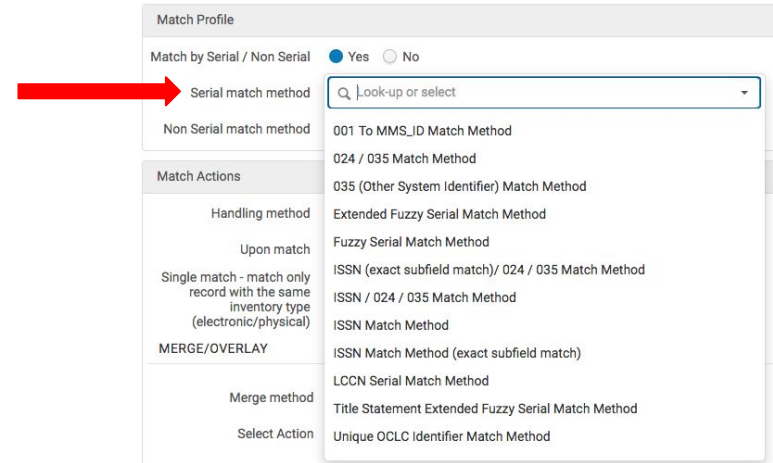1 🏠 **Films on Demand** | Portfolio List (74625) | Edit Collection | •••
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   Collection ID:
   6153789870004833

   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

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

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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⌄AllRecords_16099_12-04-2019.mrc	All Records file	12/4/2019	37,355	Downloaded: 12/04/19	⬇