

## Cataloging—Import/Export

**Enhancement#:** 3604 (02/05/2004)

**Category:** Cataloging

**Subcategory:** Import/Export

**Software Version/Release:** Horizon72.1.178.g CJK

**Subject:** Horizon72 CJK-Includes the Records Information such as Bib# in the Error Message for Bib Importing-Ref#

**Proposal:** While being imported, the records can't be loaded because tag 001 duplicated. Librarian can't find this record from title and tag 001 is not a searchable tag. So they hope that the error message includes the records information such as bib# so that librarian can find relevant records to deal with.

**Enhancement#:** 3639 (02/16/2004)

**Category:** Cataloging

**Subcategory:** Import/Export

**Software Version/Release:**

**Subject:** Import Profiles and Workforms

**Proposal:** It would be useful to be able to apply workforms as part of an import profile. Currently I can use bib tag action which allows me to change text in a particular marc field or move text from one field to another. i can't add information to a field that is blank. if i was able to apply a workform on import I could add any fields I wanted to my records on import. OCLC's Connexion already allows me to do this and it is very useful for upgrading records to a higher level or to add codes to records at import.

**Enhancement#:** 3640 (02/16/2004)

**Category:** Cataloging

**Subcategory:** Import/Export

**Software Version/Release:** 7.2

**Subject:** Selecting Records for Export

**Proposal:** It would be useful to be able to flag records that you are about to export. Currently you can run a search, select one or more records from the results retrieved and send them to export. If wanted to export records relating to two different authors I would run a search for the author, export the records, run the second search and then export the remaining records. Other systems enable you to flag records so that you can run a series of searches select the titles you are interested and then bring up alist of records that you have flagged that you can then export. Alternatively when you send them to export they could stay there until you were ready to export

**Enhancement#:** 3762 (05/05/2004)

**Category:** Cataloging

**Subcategory:** Import/Export

**Software Version/Release:** Horizon 7.2

**Subject:** Bib Tag Action Conditional on Text of Field

**Proposal:** It would be usefull to be able to make bib tag action conditional on the text of field as well as on indicator numbers. It would allow far more sophisticated manipulation of incoming records.

**Enhancement#:** 3837 (07/12/2004)

**Category:** Cataloging

**Subcategory:** Import/Export

**Software Version/Release:** 7.31a

**Subject:** Make 001-to-035 and BIB/AUTH\_IMPORT\_CONTROL be IMPORT\_SOURCE Parameters

**Proposal:** We have multiple projects involving different import rules. Some projects require 001-to-035 turned on, while others need it turned off. Also, our regular cataloger-import sessions

require a set of bib\_import\_control and auth\_import\_control values to determine which tags and subfields should be retained upon overlay -- this is very project-specific.

Now, with the 001-to-035 parameter being database-wide in the matham table, and the bib/auth\_import\_controls also being database-wide, we need to spend a lot of time coordinating the catalogers daily imports with other import projects. Then we need to change the parameters, do a project load, and then set them back before catalogers can do any of their regular work.

These parameters would make more sense on the individual import profiles.

**Enhancement#: 3857 (07/24/2004)**

**Category:** Cataloging

**Subcategory:** Import/Export

**Software Version/Release:** 72.CJK

**Subject:** Overlay Given Tag When Importing

**Proposal:** In general, the horizon will overlay all tags when import if the staff choice the option ``overlay``, but the library hope they can ovelay only given tags and matched by ISBN or ISSN, when importing. So they can batch change some tag by the system , not manually.

For example, the library want to batch add tag 856 for some bibs, they hope the system ovelay only tag 856 and remain other tags when import.

**Enhancement#: 3886 (08/11/2004)**

**Category:** Cataloging

**Subcategory:** Import/Export

**Software Version/Release:** Horizon 7.3.2

**Subject:** Vendor Loads with No Decimal in Price Tag

**Proposal:** Would like the decimal place to be automatic when vendors do not add it to their item record price tags. This was a problem in Dynix but a program was written to fix the problem.

Would like this done for Horizon. Some vendors will not change the price to include the decimal in which case we have to manually change the prices after the imports.

**Enhancement#: 3977 (09/30/2004)**

**Category:** Cataloging

**Subcategory:** Import/Export

**Software Version/Release:** 7.3.2

**Subject:** Add Import Options to Z39.50 Record Save Feature

**Proposal:** The current Z39.50 search function from the Horizon client allows you to locate a bib record and save it directly to your Horizon database. But it does not permit any target or overlay capability, auto-create of an item record, transposing of the 001 to 035 field, etc. such as exist for Bib Import/MARCIN. We would like to see these kinds of options added to the Z39.50/save feature.

**Enhancement#: 4021 (10/20/2004)**

**Category:** Cataloging

**Subcategory:** Import/Export

**Software Version/Release:** 7.3.2

**Subject:** Retain the Name of the Last Imported File

**Proposal:** In the Horizon Cataloging module every time a cataloger imports a bibliographic record they must enter the name of the file to be imported, ``IMPORT.DAT``, for example. We would like Horizon to retain the name of the last file imported as the default, which could then be overridden as needed.

**Enhancement#: 4209 (03/14/2005)**

**Category:** Horizon > Cataloging

**Subcategory:** Import/Export

**Software Version/Release:** 7.3.2

**Subject:** Review Imported Bibs from Import Window

**Proposal:** Once I have imported bibs you get the ``Marc import complete`` message. It would be handy to have a button appear that allows me to view the imported bibs. Ideally this

would go to a summary list of the titles imported. At present if I want to check what has been imported I have to search for them.

**Enhancement#:** 4209 (03/14/2005)

**Category:** Horizon > Cataloging

**Subcategory:** Import/Export

**Software Version/Release:** 7.3.2

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**Enhancement#:** 4278 (05/05/2005)

**Category:** Horizon > Cataloging >

**Subcategory:** Import/Export

**Software Version/Release:** 7.3.2

**Subject:** Ability to Add Tags/Subfields at Import

**Proposal:** Currently the import source setup permits MARC tag and subfield changes and deletions but does not permit the addition of tags or subfields. We would like to have that option because it would save the library staff considerable time in editing MARC records.

For example:

We currently import MARC records from OCLC (98% and full records) and Ingram (2% and brief records). We would like to have the ability to setup an import source for incoming records that automatically inserted a MARC 092 subfield a of ``ON ORDER``. This would save staff the time of manually adding this to each incoming MARC record.

We recently downloaded 210 records from the vendor who supplies our online testing product. These records contained multiple coding errors and cleaning them up is taking considerable time. If we had the ability to add MARC tags/subfields I could have setup an import source for this project and automatically added the correct tags/subfields and automatically deleted the incorrect tags/subfields.

I shudder at the idea of importing thousands of MARC records to improve customer access to the thousands of magazine available on our website. MARC records are available from the vendor for these titles. If we had the ability to add MARC tags/subfields I could download some test records and then using the information gained from this sample, I could setup an import source for this project that would address any MARC tag/subfield problems and save the staff editing time.

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**Enhancement#:** 4310 (05/23/2005)

**Category:** Horizon > Cataloging >

**Subcategory:** Import/Export

**Software Version/Release:** 7.3.3

**Subject:** Add 'Rename Sunfield' To Bib Tag Action

**Proposal:** It is currently possible to rename tags and subfields at import. This is defined in Bib Tag Action. We would like to be able to rename indicator values as well. It should be possible to change either or both of the indicators.

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**Enhancement#:** 4517 (02/07/2006)

**Category:** Horizon > Cataloging

**Subcategory:** Import/Export

**Software Version/Release:** 7.33

**Subject:** Allow ACQ Ownership to be Set for Bib Imports Used to Create PR/PO

**Proposal:** Add a parameter to import\_source profile options that would allow records to be assigned to ACQ ownership for records being loaded to create POs and PRs.

Currently, records loaded from B&T/Ingram come in without ACQ ownership, so if an order is canceled, bib. cannot be automatically deleted in Acquisitions. Instead, Acquisitions staff must cancel the order in ACQ, then search and delete the title in Cataloging.

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**Enhancement#:** 4612 (06/28/2006)

**Category:** Horizon > Cataloging

**Subcategory:** Import/Export

**Software Version/Release:** 7.3.2

**Subject:** Change to the Tag Translation Option in Bib Import

**Proposal:** Currently the tag translation option on bib import looks at the entire text of the subfield, including punctuation. This ``strict`` match requirement means that the library must input multiple translations to accommodate variations in how a vendor supplies a record.

For example, records from BBC for audiobooks, come with a 245 h of ``[sound recording]``. If we want to automatically translate that to ``[compact disc, unabridged]`` at import, we must anticipate the possible combinations of punctuation that the vendor might provide. Two recent examples:

``[sound recording] :``

and

``[sound recording] /``

The difference between these two is a semi-colon and a slash, depending upon the inclusion of a specific subfield after the h subfield.

What I would like to have the translation option do is look for a text string. If this ``in-value`` string is found, replace it with the specified ``out-value`` string, without regard to other punctuation.

**Enhancement#:** 4691 (10/31/2007)

**Category:** Horizon > Cataloging

**Subcategory:** Import/Export

**Software Version/Release:** 7.3.4

**Subject:** Overlay Exception

**Proposal:** Allow libraries to set up exceptions criteria for the bib import overlay. For example, when the existing 245 tag has subfield ``h`` we want a new bib record to be created rather than overlaid.