

Kanopy BASE Import Profile Reference

Profile Details Tab

Import Profile Details Save Draft Cancel Save

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

Profile Details

Use Network Zone Yes

Profile name *

Profile description

Originating system * File name patterns

Import Protocol Cross walk No Yes

Physical source format

Encoding format

Source format Target format

Status

Normalization & Validation tab

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

Filter

Filter out the data using

Normalization

Correct the data for matching and cataloging using i

Change the data for PO line and inventory using i

Validation Exception Profile

Handle invalid data using

Skip records with validation issues i

Network Zone Records Handling

Import local extensions No Yes i

Match Profile tab

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Match Profile

Match by Serial / Non Serial Yes No

Serial match method **035 (Other System Identifier) Match Meth** ▼ System Identifier Prefix

Non Serial match method **035 (Other System Identifier) Match Meth** ▼ System Identifier Prefix

Match Actions

Handling method Automatic Manual

Upon match Merge Overlay Do Not Import Use NZ Record

Select Action Disregard matches for bibliographic CZ linked records

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

Match on title type ⓘ

MERGE/OVERLAY

Merge method **CONSORTIUM NZ Overlay all fields but lo** ▼

Select Action Allow bibliographic record deletion

Do not override/merge a record with lower brief version

Do not override Originating System

Community Zone linked records handling **Unlink record from Community Zone and create a local rec** ▼

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

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)

Match on title type ⓘ

Choose a conclusive action in case the above selected criteria result in multiple records:

Skip and do not import unresolved records

Use record with the latest created date

No Match

Upon no match Add To NZ Do Not Import Import To IZ

Set Management Tags tab

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Set management tags for all the records imported using this profile ▼

Suppress record/s from publish/delivery <input type="checkbox"/>	Condition	Only for new records ▼
Suppress record/s from external search <input type="checkbox"/>	Condition	Only for new records ▼
Synchronize with OCLC Publish Bibliographic rē ▼	Condition	Unconditionally ▼
Synchronize with Libraries Australia Don't publish ▼	Condition	Only for new records ▼
Set record/s cataloging level <input type="checkbox"/>	Cataloging level	[00] Default Level fo ▼ i

Inventory Information tab

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

Inventory Operations ▼

Electronic Mixed Physical None

Electronic Resource Mapping ▼

Delete/deactivate portfolios

Use Community Zone portfolios

Portfolio type Standalone Part of an electronic collection

Electronic Collection * X ≡ ↺

Service * ▼

Material type ▼

Single portfolio Multiple portfolios

Create inventory only for new bibliographic records

	Field	Subfield	Default Value
Extract access URL from field	<input type="text" value="856"/>	<input type="text" value="u"/>	<input type="text" value="4#,41,42,43"/>
Extract interface name from field	<input type="text"/>	<input type="text"/>	<input type="text"/>
Extract internal description note from field	<input type="text"/>	<input type="text"/>	<input type="text"/>
Extract authentication note from field	<input type="text"/>	<input type="text"/>	<input type="text"/>
Extract public note from field	<input type="text" value="856"/>	<input type="text" value="z"/>	<input type="text"/>
Extract library from field	<input type="text"/>	<input type="text"/>	<input type="text"/>
License	<input type="text" value="Select from a list"/>		<input type="text"/>

Activate resource

↑