

Kanopy BASE Import Profile Reference

Profile Details Tab

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

Profile Details

Use Network Zone Yes

Profile name * Kanopy BASE ECollection (CARLI Template) (copied from NZ)_2023-09-19 22:32:21.096

Profile description Add, update, delete Kanopy bib records and portfolios

Originating system * Kanopy

File name patterns

Import Protocol Upload File/s

Cross walk No Yes

Physical source format Binary

Encoding format UTF-8

Source format MARC21 Bibliographic

Target format MARC21 Bibliographic

Status Active

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
Move 856 to 956

Change the data for PO line and inventory using
Copy 856 to 956 for Inventory Creation

Validation Exception Profile

Handle invalid data using MarcXML Bib Import

Skip records with validation issues

Network Zone Records Handling

Import local extensions No Yes i

Match Profile tab

Import Profile Details

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

Match Profile

Match by Serial / Non Serial Yes No

Serial match method	035 (Other System Identifier) Match Method	System Identifier Prefix (CaSfKAN)
Non Serial match method	035 (Other System Identifier) Match Method	System Identifier Prefix (CaSfKAN)

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 local

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 record

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

Set management tags for all the records imported using this profile

Suppress record/s from publish/delivery Condition Only for new records

Suppress record/s from external search Condition Only for new records

Synchronize with OCLC Publish Bibliographic record Condition Unconditionally

Synchronize with Libraries Australia Don't publish Condition Only for new records

Set record/s cataloging level Cataloging level [00] Default Level for

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Inventory Information tab

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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 *

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="956"/>	<input type="text" value="u"/> <input type="text" value="4#,41,42,43"/>
Extract internal description note from field	<input type="text"/>	<input type="text"/>
Extract authentication note from field	<input type="text"/>	<input type="text"/>
Extract public note from field	<input type="text" value="956"/>	<input type="text" value="z"/>
Extract library from field	<input type="text"/>	<input type="text"/>
License	<input type="text" value="Select from a list"/> <input type="button" value="≡"/>	

Activate resource