**SCP-AG Meeting**

**May 15, 2017**

**Present**

Trina Pundurs (UCB), Sarah Wallbank (UCI), Kevin Balster (UCLA), Sarah Sheets (UCM), Marcia Barrett (UCSC), Becky Culbertson (UCSD/SCP (Bie-Hwa and Kate), Jared Campbell (UCD), Manual Urrizola (UCR)

**Agenda**

Demo – Loading SCP monograph records into Alma/Primo

**Notes**

Serials and monographs are treated differently. Jared will make a video of importing serials and share that. We can discuss the serial loading next month.

* UCD has been in Alma since August. They had stopped importing SCP files late-July, and it was November before they started importing.
* ER are handled differently in Alma than what UCD had experienced in Aleph.
* Alma doesn’t have a MARC holdings record for the ER. ER has an electronic portfolio.
* Electronic portfolio contains a lot of information about your electronic resources.
* Alma has a hierarchy for how you can deal with ER
  + Electronic collections are defined locally. You describe a group of materials (like materials received through a single license). You have information about how you activate your resources. These are linked to the 793 field
  + UCSB is treating SCP as a collection, regardless of what’s in the 793 field because SB isn’t handling the licensing
* If you have overlap in coverage (ebook coming from two separate licenses), you can define how import is handled in the import profile.
* UCD is creating electronic portfolios only for materials they’re providing full-text for
* Activation means publish to user interface
* Linking section pulls from 856 field
* Coverage information will be empty for monographs
* Acquisition information – Jared doesn’t deal with PO Lines
* Public Notes
* History
* Every Monday, Jared grabs new SCP file from ftp server and brings in to workstation
* Jared processes files before import with MarcEdit – creates 3 separate files
  + file of records that are deletes
  + file of records that are updates
  + file of records that are new
  + Removes 599 field, some uncontrolled genre headings

Importing Records

* Alma allows import in MARC21 and MARCXML
* Set up import profile
  + Originating system (where you’re getting records)
  + Import protocol - upload, ftp, or OAI
  + Physical source format – binary (for MARC21)
  + Encoding format – UTF-8 (important for diacritics)
  + Source format – MARC21 Bibliographic
  + Status – Active
* Can write normalization/filter rules to alter fields before importing

Match Profile

* How records are handled in import process
* Set Match profile (match method)
* Set Match Actions (merge, overlay, do not import, import new record)
  + Reporting lists records not imported
* Set Merge method

Set Management Tags

* Automatically synch holdings with OCLC

Inventory

* Basic configuration on how Electronic Portfolios will be created
* Portfolio type – Standalone or Part of an electronic collection
* Only public note is subfield u
* Have to do additional manual work for subfield 3 information (multi-volume monographs)
* Details page – there’s a way to display all the notes and all the links

Update Profile

* Match Profile differs from New Profile
* Match actions – merge upon match

Automatic Multi-Match Handling

* When Alma finds two or more records with same OCLC number (Alma dislikes this!)
* Alma skips these matches during import process, then reports out multi-matches
* These are resolved manually
* *Some UCD records were migrated into Community Zone (records with old OCLC number; merged with another record upon migration)*

Alma creates separate Electronic Portfolios for each 856 field

UCD adds 910s to indicate when record was added for local statistics keeping

Viewing records in Primo

* Reindexing happens every 6 hours

Next Meeting: June 19, 2017