Single Record Import

Overview

Single Record Import is available in FOLIO as of the Iris release.

The idea is to do:

1) Starting from Inventory, pull the MARC record from a designated source e.g. OCLC WorldCat, or Library of Congress by using the Action menu in Inventory. The process will automatically populate the MARC record in Inventory and SRS as in one action whether it’s creating a new record, or overlay of an existing record. This approach is less cumbersome than the full Data import app. using predefined targets, then the records are to be retrieved via their control number in the target system (e.g. OCLC number for Connexion, LCCN for Library of Congress)

2) Push the MARC record from OCLC Connexion into FOLIO

Use cases

1. Acquisitions downloading a record, which will then be ordered
2. Cataloging overlaying a brief or earlier version of a record with a newer version

Settings

Multiple targets can be enabled in Settings > Inventory > Z39.50 targets

The little check mark indicates if the Z39.50 target profile has been enabled. Please notice that the OCLC WorldCat profile needs the institution’s local Authentication.

<table>
<thead>
<tr>
<th>Library of Congress</th>
<th>OCLC WorldCat</th>
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Inventory

In Inventory two action menus are present:

1. Import. Creates the Instance and the underlying SRS MARC, based on the library’s default MARC-to-Instance map.
2. Overlay. Updates the Instance and creates an underlying SRS MARC (if Instance source is FOLIO), or updates the Instance and the SRS MARC (if Instance source is MARC).

**Import - Triggered from main Inventory Action menu**

**Overlay - Triggered from Instance detail view Action menu**

When multiple targets are enabled, then the user in Inventory will be shown a dropdown list in the pop up modal, and here the user will then select which option to use for the single record import.

Note that the query sent to the Z39.50 server is specified in the target profile: for OCLC and the OCLC Number, the query template is @attr 1=1211 $identifier. That means that the searched-for identifier is substituted into the template yielding a query such as @attr 1=1211 12345.T. This means the external identifier — in this case, the OCLC number — is the only thing that gets sent. The app will not parse out any prefix characters; whatever is entered will be sent to the Z39.50 server.

**Importing to create a new record**

Importing to overlay an existing record whether it has instance status FOLIO or MARC
Limitations with the current implementation (Iris)

- Tenant can only use one system-defined profile for Creates and one for Overlays
The entire MARC record is imported. If there are fields that are not desired (e.g. 938s) or local fields that are desired, they must be edited out or into the MARC record after import.

Configuring the Connexion Client to Push Records into FOLIO

These instructions will work for any of the current Reference Environments

The screen we are going to configure in Connexion is Tools -> Options -> Export -> Create a “Destination”... choose an OCLC Gateway:

Configure the Host Name to be {folio environment}-edge.dev.folio.org where {folio environment} is one of:

- folio-snapshot
- folio-testing
- folio-snapshot-load

The Port should be 9000

The Logon Id is and API key that is used to specify a system user to the edge-connexion module. Enter this value: eyJzIjoiblo1NkYzTGVBYSilnQiOiJkaWt1IiwidSI6ImRpa3UiLCJwYWdlIjoiZ2ltZyJ9

You are ready to push records into FOLIO from within Connexion.

NOTE that you can push whatever draft of a record you are looking at within the Connexion Client.
Note that the web interface of Connexion works a little different as far as getting to the settings screen, but here’s the analogous screen to configure in the web interface: