# 2022-09-14 Data Import Subgroup meeting

**Recordings** are posted [Here](#) (2022+) and [Here](#) (pre-2022)  
**Slack channel** for Q&A, discussion between meetings  
**Requirements** details [Here](#)  
Additional discussion topics in **Subgroup parking lot**

**Attendees:** Ann-Marie Breaux  
Leeda Adkins  
Jennifer Eustis  
Shannon Burke  
Lisa McColl  
Lloyd Chittenden  
Dung-Lan Chen  
Heather MacFarlane  
Jeanette Kalchik  
Jenn Colt  
Mark Arnold  
Raegan Wiechert  
Taylor Smith  
Lynne Fors  
Christie Thomas

## Current development (Nolana)
- Nolana Folijet planning dashboard  
- Folijet Current Development Board

## Agenda topics:
- **Morning Glory Bug fixes for Data Import completed last week:**
  - Strike that - one potential MG bug that needs fixing:
    - [MODSOURMAN-874](#) - Data import: fails the creation of a Holding through a match on the 999 ff field  
- **Order field mapping profile questions**
  - [UIDATIMP-294](#) - Field Mapping Profile details: Order PO & POL from MARC Bib (Create/Edit)  
  - Draft slides [here](#)  
  - A-M to add notes from Slide deck and Zoom recording  
  - Start on screen 10 - finish screens (10-11, slides 11-12)  
  - Review checkbox mapping option (slides 13-14)  
    - Decided to just use the mapping, and not have the dropdown list of options  
    - A-M will review with devs and redo the mockups  
  - Review UI for always/sometimes required fields (slide 15)  
    - Looks good  
    - A-M will add stories to add the "required" info icon for the 1 required Holdings field and 3 required Item fields (UI-only)

## Upcoming meetings:
- **21 September 2022**
  - Update individual fields  
  - Begin discussing create/update multiple holdings/items from imported MARC Bibs  
- **28 September 2022**
  - TBD

## Zoom chat:

From Lynne Fors to Everyone 01:05 PM  
We use the 999 match

From Jennifer Eustis (she/her) to Everyone 01:10 PM  
I don’t think so. We do more edifact and we’re starting with edifact

From Christie Thomas (she/her) to Everyone 01:15 PM  
same here. not in one order, but multiples in one file.

From Jenn Colt to Everyone 01:19 PM  
We always expect multi to be a pain so it’s not a downgrade for us right now

From Leeda Adkins to Everyone 01:20 PM  
Same here

From Christie Thomas (she/her) to Everyone 01:23 PM  
we probably would not have call number and enumeration at the point of order, so we could not use that to match for an update in a later step. Yeah, we are not batch loading any orders that are not single title / single copy right now. We are doing those manually.

From Lloyd to Everyone 01:26 PM  
@christie, I see that won’t work for orders. I guess orders could get a vendor number in the holdings record and items could match on that.

From Dung-Lan Chen to Everyone 01:28 PM  
We are not currently filling in “receipt due” and “expected receipt date” fields.

From Jennifer Eustis (she/her) to Everyone 01:28 PM  
We don’t use them at UMass
From Christie Thomas (she/her) to Everyone 01:28 PM
we do not use them.

From Lynne Fors to Everyone 01:28 PM
As far as I know, we are not

From Dung-Lan Chen to Everyone 01:33 PM
For one time orders, we default to create "instance, holdings, item" assuming most of them are brand new titles to add to collection. For added copy or added volume, we have a separate process.

From Christie Thomas (she/her) to Everyone 01:38 PM
that would be an excellent function
that would save us so much time! thank you for bringing that up.
my mind is going crazy with the possibilities!

From Dung-Lan Chen to Everyone 01:38 PM
Sort of like de-duping check. Our previous ILS has can de-dup ISBN during EDI order import process.

From Jennifer Eustis (she/her) to Everyone 01:42 PM
We would map this as well
We don't use this either.

From Jenn Colt to Everyone 01:42 PM
all our e stuff is coming via gobi not marc

From Raegan Wiechert to Everyone 02:00 PM
Yes, to items!

From Lynne Fors to Everyone 02:00 PM
+1

From Dung-Lan Chen to Everyone 02:01 PM
Thank you, Ann-Marie, I have to jump off for a Ref shift.

From Christie Thomas (she/her) to Everyone 02:03 PM
For re-encumber it is checked by default. As long as that holds true for batch imports we do not need to modify this check box in the import profile.

From Taylor Smith to Everyone 02:03 PM
sounds good