

NERS #6666 Solution with images:

The need

- Add the following mapping options to “New order” import profile:
 - Electronic collection
 - Material Type
 - Acquisition method
- Today it is not possible and the above are determined on the level of the entire import profile, impacting the content of the entire file.

Suggested solution

- Note: The text description and visual presentation of the fields are for demonstration purposes, the final design may change for optimal user experience.

Visual presentation :

Electronic collection mapping + Material Type mapping

The screenshot shows the 'Import Profile Details' form. At the top, there is a progress indicator with steps 1 through 7, where step 6 is currently active. Navigation buttons for 'Cancel', 'Save Draft', 'Back', and 'Next' are visible. The form is divided into sections: 'Inventory Operations' with radio buttons for 'Electronic', 'Mixed', and 'Physical'; 'Electronic Resource Mapping' with checkboxes for 'Delete/deactivate portfolios', 'Use Community Zone portfolios', and 'Create inventory only for new bibliographic records'; radio buttons for 'Portfolio type' (Standalone, Part of an electronic collection) and 'Multiple portfolios' (Single portfolio, Multiple portfolios); a dropdown for 'Material type' set to 'Book'; a dropdown for 'Enable proxy' set to 'False'; and a table for field mapping with columns 'Field', 'Subfield', and 'Default Value'. A red arrow points to a new checkbox labeled 'Multiple material types' with the text 'New Check Box' next to it. The table contains rows for 'Extract access URL from field', 'Extract interface name from field', 'Extract internal description note from field', 'Extract authentication note from field', and 'Extract public note from field', each with input fields for 'Field', 'Subfield', and 'Default Value'. A text box on the right says 'Indicators to skip (use # for empty indicator)'.

Here is how the visual presentation will appear in case where “Part of Electronic Collection” will be selected AND the new "Multiple material types" checkbox will be selected:

Inventory Operations

Electronic Resource Mapping

Electronic Mixed Physical

Delete/deactivate portfolios

Use Community Zone portfolios

Portfolio type Standalone Part of an electronic collection

Extract collection ID from field Subfield Default Value Map Collection

Multiple material types

Extract material type from field Subfield Default Value Map Material type

Enable proxy False

Single portfolio Multiple portfolios

Same "Electronic Collection" field which exists today - will be used in 2 use cases:
1. When there is no mapping defined within the new mapping fields
2. When the mapping field is populated but the input file does not have a value/has a value which is not supported

In case the vendor will not have the exact collection ID or Material type, you can set a mapping between the collection/material type name which will appear on the vendor file and the actual collection/Material type in Alma

Same "Material Type" field which exists today. will be used in 2 cases:
1. When there is no mapping defined within the new mapping fields
2. When the mapping field is populated but the input file does not have a value/has a value which is not supported

Acquisition Method mapping

EOD General Parameters

Electronic PO Line type *

Multiple vendors

Vendor Vendor account

PO Line currency US Dollar

Decimal point location 0

Multiple Acquisition Methods ← New Check Box

Acquisition Method Purchase

EOD mapping

Additional PO line reference field	<input type="text"/>	subfield	<input type="text"/>
Vendor Reference Number field	<input type="text"/>	subfield	<input type="text"/>
Vendor Reference Number type field	<input type="text"/>	subfield	<input type="text"/>
List price field	<input type="text"/>	subfield	<input type="text"/>
Vendor title number field	<input type="text"/>	subfield	<input type="text"/>
Volume Part Number field	<input type="text"/>	subfield	<input type="text"/>
PO number field	<input type="text"/>	subfield	<input type="text"/>
PO Line Owner field	<input type="text"/>	subfield	<input type="text"/>
Default PO Line owner	<input type="text"/>	Man Owner	<input type="checkbox"/>

Here is how the visual presentation will appear in case the new option was selected:

EOD General Parameters

Electronic PO Line type *

Multiple vendors

Vendor

PO Line currency

Multiple Acquisition Methods

	Field	Subfield	Default Value
Extract Acquisition Method from field	<input type="text"/>	<input type="text"/>	Purchase

Same "Acquisition Method" field which exists today - will be used in 2 use cases:
 1. When there is no mapping defined within the new mapping fields
 2. When the mapping field is populated but the input file does not have a value/has a value which is not supported

EOD mapping

Additional PO line reference field		subfield	
Vendor Reference Number field		subfield	
Vendor Reference Number type field		subfield	
List price field		subfield	
Vendor title number field		subfield	
Volume Part Number field		subfield	
PO number field		subfield	
PO Line Owner field		subfield	

Additional comments

1. The suggested changes refer to "New Order" import profile (EOD), but will also apply to "Repository" import profile and "Update inventory" import profile (only relevant for Material type and Collection)
2. The NERS request for "Material Type" mapping is aimed to address Physical inventory workflows but the solution will be applied also for Electronic resources where relevant
3. The NERS request for Electronic Collection mapping is mostly relevant for "Repository" import profile but the solution will be applied also for "New Order" import profile (EOD).