

# Destiny® Library Manager

## Importing Title Records

Teachers and students rely on your library for up-to-date resources and information, so you need to be able to add new materials to your catalog quickly and efficiently. Whenever your vendor gives you an importable file of MARC records for new titles or copies, use Destiny Library Manager's easy-to-use title import function.

1. Select **Catalog > Import Titles > Add/Update** sub-tab.
2. In the **Title Matching** section, select how you want Library Manager to compare the incoming records for a match in your catalog:
  - **Strict:** Follett recommends strict title matching, which requires a match on the LCCN, ISBN or ISSN, plus the title and material type. If the author and publication dates are present, they are also compared. However, you can choose **Remove the author requirement from the strict matching rules**. If an incoming record contains a 13-digit ISBN and your district collection record has the 10-digit form of that ISBN – or the reverse – Library Manager considers them the same ISBN.
  - **Relaxed:** You can choose to have Destiny Library Manager match title records based on title, material type, author and publication date if a standard number is not found. If you don't mind that a title has different publication dates and standard numbers, you can also choose **Remove the standard number and publication date requirements from the relaxed matching rules**.
3. Select how you want Library Manager to handle incoming records if its MARC record data matches existing records in your catalog.

**Note:** Follett recommends you replace your existing title records with the import records if they have more information. By default, Library Manager replaces the existing records, but preserves and merges local tags or fields of information that apply specifically to your library.

### Title Matching ?

- Strict** - Standard numbers, titles, material types, authors, and publication dates must match
  - Remove the author requirement from the strict matching rules
- Relaxed** - If no standard number is found, allow matches based on title, material type, author, and publication date
  - Remove the standard number and publication date requirements from the relaxed matching rules

#### If an incoming title matches an existing title:

- Replace the existing title if the incoming title is better ?
- Skip the incoming title
- Always add the incoming title (may cause duplicate titles; Strict Matching will be used) ?

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4. In the **Copy Matching** section, select how you want Library Manager to handle any copy records where an incoming barcode matches a barcode already in your catalog.

**Note:** Follett recommends you skip the duplicate incoming copy. If you choose to skip an incoming copy when the barcode matches an existing copy's, the report generated at the end of the import will identify any skipped copies. You need to add these copies manually.

**Copy Matching**

- Skip the incoming copy if its barcode matches an existing copy's barcode
- Replace the existing copy with the incoming copy if the barcodes and the titles match
- Always add the incoming copy record and assign it the next available barcode

**Starting Barcode**

[Generic Code 39, 10 characters total]

Assign next barcode

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5. In the **Assign Copy Information** section, click **Update**. Complete any of the following fields.

**Assign Copy Information**

If missing, assign the following information to each copy that is added or replaced:

**Circulation Type**  Regular  Based on Call Number

If an incoming call number is not assigned to a Circulation Type, the Circulation Type will be set to "Regular".

**Copy Categories**

**Sublocation** -- Undefined --

**Vendor** -- Undefined --

**Funding Source** -- Undefined --

**Status** Available (only when adding copies)

For every incoming copy where the price has...

**Change Currency Code** United States Dollar (USD)   
to United States Dollar (USD)

**Exchange Rate** :

(Leave the box empty to make no changes to incoming price information.)

Field	Definition
<b>Circulation Type</b>	<p>Assigns all the copies in the import file to a specific circulation type.</p> <div style="background-color: #e0ffff; padding: 5px; border: 1px solid #add8e6;"> <p><b>Note:</b> Selecting this option will assign every item in the import file to the selected circulation type. Follett does not recommend selecting this option if the import file contains materials with various circulation types.</p> </div>

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Field	Definition
<b>Based on Call Number</b>	Assigns the copies in the import file to different circulation types. <b>Note:</b> To review or update the library's circulation type/call number associations, click <b>Update</b> .
<b>Copy Categories</b>	Assigns all the copies in the import file to one or more copy category that was created prior to the import. <b>Note:</b> To select the appropriate category descriptions, click <b>Assign</b> , and then click <b>OK</b> .
<b>Sublocation</b>	Assigns the copies in the import file to a specific location/genre/subject. <b>Note:</b> To add a location/genre/subject, click <b>Other</b> .
<b>Vendor</b>	Assigns copies in the import file to a vendor. Select the appropriate vendor from the <b>Vendor</b> drop-down. <b>Note:</b> To add a new vendor, click <b>Other</b> .
<b>Funding Source</b>	Assigns the copies in the import file to a particular funding source. <b>Note:</b> To add a new funding source, click <b>Other</b> .
<b>Status</b>	Assigns a status to copies being added during an import.

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6. In the **Import File** section, do the following:

- a. To add the incoming titles to a previously-created Resource List, select **Add the titles in the import file to** and choose a Resource List from the drop-down.
- b. If your import file contains eBook records that belong only to your school, select **This file contains eBook records for only this site**. This prevents other sites in your district from being able to view and access the eBooks.
- c. To limit the details in your import report to errors and warnings, select **Limit the Job Summary details to errors and warnings**.

**Note:** Deselecting this checkbox will create a record of every title and detail in the import file on the import report.

- d. To list possible duplicate titles in the report summary after the import, select **List possible duplicate titles in the Job Summary after import**.

Import File Choose File No file chosen

Add the titles in the import file to -- Select a List -- View List

This file contains eBook records for only this site. ?

Limit the Job Summary details to errors and warnings (clear this option for a record of every title and copy in the import file).

List possible duplicate titles in the Job Summary after import. ?

Preview Import

7. To have Library Manager compare incoming records with existing records, and generate a Job Summary without actually importing the records, click **Preview**.

**Note:** Follett recommends that you check the results before importing the records so you can decide whether the import settings need adjustment before you import.

- 8. If you are happy with the preview, click **Import** to begin the import. The Job Manager opens, and your report displays as *In Progress* at the top of the list.
- 9. When the status is Completed, click **View**.

**Note:** If any copies show as “skipped” on the report, you must add them manually.