

RIALTO CONFIGURATION

3 Import Profiles

Rialto-specific import profiles have been set up by your Proquest implementation team, and you are able to customize them as needed from the import profiles page. Depending on your user role, you will be able to see import profiles either from the Acquisitions menu > Manage Import Profiles, or from the Resources menu > Manage Import Profiles.

Let's focus in on only the Rialto-specific profiles by entering Rialto into the search box. There is an import profile that corresponds to each platform from which you purchase electronic resources using Rialto. The import profile type depends on whether the resources purchased from that platform are put in a local or a Community Zone electronic collection. If the resources from that platform are put in a local electronic collection, then the import profile type is Update Inventory. The match point for the Update Inventory Import Profiles is the PO Line. If the resources from that platform are put in a Community Zone electronic collection, then the import profile type is Repository. The match point for the Repository Import Profiles is the ISBN. In a case where no matching Community Zone record is available, a local record will be created instead.

Multimatches may happen if a title has multiple match opportunities within the Alma Repository. In the event that this happens, you will want to monitor the matching issue from the page Resolve Import Issues, which is in the Resources menu. With either the Update Inventory method or the Repository method, the import profile will import and overlay the full MARC records as well as activate the resources.

Let's look at the configuration options for these import profiles.

This is the profile for Ebook Central that is associated with a local electronic collection. Click the row-action menu and select Edit. This is the Profile Details tab. Here you have the Profile name and description, as well as the originating system. The File name patterns are used to map the platforms to incoming files. This value cannot be changed as it will break the match point for incoming files. Under the Normalization and Validation tab, custom normalization rules created by the institution can be applied under each import profile. Under the Match Profile Tab, you can see that the Match method is by PO Line. For Community Zone collections, which are Repository import profiles, the match point will be an exact match on the ISBN. The merge method used for each import profile is the Rialto Overlay merge rule, which is a copy of the default "overlay all but local" merge rule. You can customize this as needed.

Under the Inventory Information Tab, this is set to Electronic only. These resources are mapped to the platform's collection, and extract information from the 856 field, subfields u, x, and z. This check next to Activate resource means that the resources will be activated automatically. Under the PO Line Tab, the incoming records are mapped to the Rialto Vendor and the Purchase Order Line mapping as well as the invoice number mapping are set. The PO Line will use the 960\$a, and full MARC will use the 960\$b for the invoice number once delivered.

There is also an import profile for all print purchases made through Rialto. These are handled by the Rialto Physical Full import profile. This import profile adds the inventory information to the record. It is similar to the electronic import profiles. Some differences can be found on the Inventory Information tab. Of course, these are Physical resources only. The mapping includes the library and location of the book: the Library Field to the 961 \$a, the Location to the 961 \$b, and Number of Items to the 960 \$c. The Default Number is set to 1, the barcode field to 961 \$d, and the default Item Policy to 961 \$e. Update Holdings Call Number is checked. This means the import will add inventory information and associate the call number when the import occurs.

There is an additional import profile called RialtoMatch. This runs in the background when you add an Ebook to your Rialto cart. RialtoMatch checks your inventory to see if your institution already has a print version of the same book, in order to prevent overlaying an Ebook record over the print record. This can be augmented with any custom rules you might have for Merge Method.

Those are the Rialto import profiles. I hope this was a helpful overview of Customizing Rialto Import Profiles. Thanks for watching.