Policy: Non Overlay Full by Brief Flag

Policy Justification: Interim Policy on use of the “Do not override/merge a non-brief record with a brief version” flag in Alma import profiles.

In the December 2014 release, Ex Libris added a flag to the import profile (found in the Match Profile tab) which, when checked, will prevent a “brief” record from overlaying a “full” record. However, it has been determined that the existing algorithms for determining what is a brief record is not adequate for SLC purposes. Therefore, it is SLC policy for the time being that staff should not check this flag.

With the Alma August 2016 release, Ex Libris updated the algorithms used for determining the brief level record utilizing the brief level rules established. (see: Alma Brief Level Record Configuration) While testing did show that some of the functionality works as expected, it can still be confusing to determine when using the setting could be helpful, and when it could cause problems.

SMSP recommends that staff should not check this flag until Ex Libris can resolve these issues. Orbis Cascade Alliance has shared its testing results with Ex Libris, and the Alliance will work with Ex Libris through the COE Initiative. Testing results are shared below, including when using the setting may work as expected.

Testing results:

Scenarios where functionality works as expected post August 2016 release:

- Using the setting in Repository import profiles that have a Merge setting in the Match tab, if the import is not creating or changing inventory.

Problems:

- Testing has revealed that using this setting when importing records to create or change inventory (physical or electronic) causes errors in POL creation and with the portfolio creation/update process.
How this setting works (see Alliance documentation for more information):

- When importing records to the NZ, this setting prevents an incoming record with a lower brief level (as assigned by the NZ rules) from overlaying a matching existing NZ record that has a higher brief level.
- The NZ brief level can be different than the IZ brief level. Only the brief level in the NZ is considered when the import loads to the NZ.

History:

The 3-month implementation of the Brief level rule in Alma has been completed with the August release. More information about the history and settings of the Brief level rule in the NZ is available in the Alliance documentation. The brief level rule has been set in the NZ as detailed in the documentation. Brief levels were assigned to existing NZ records and all incoming records from Connexion or imports are assigned brief levels.

Further configuration and testing may result in changes to this policy.