

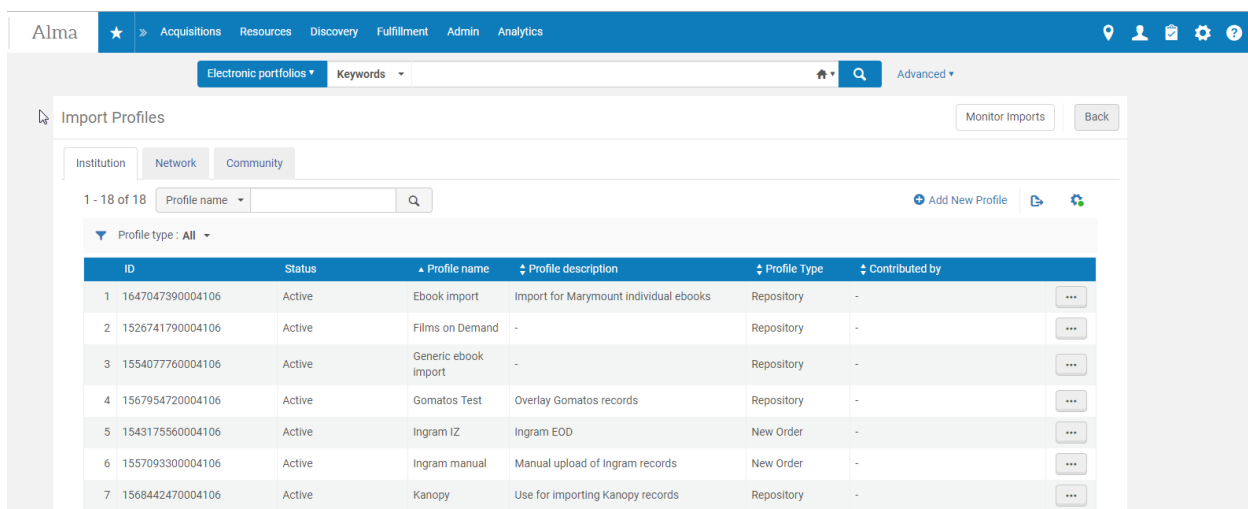
How to create an Alma import profile

There are several types of import profiles in Alma. Different import profiles may be appropriate for different types of materials.

Creating a Repository Import Profile

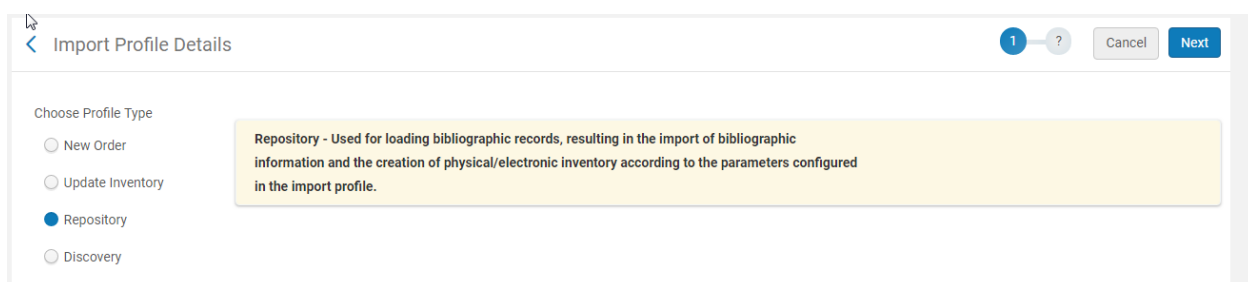
Repository import profiles are the most common import profile type you will create in Alma. They can be used to load and update local electronic collections, and to load batches of records

- Go to Resources > Import > Manage Import Profiles
- A list of all import profiles you have access to will appear. In addition to those created for your institution, there are also import profiles that come from the Network Zone and the Community Zone.



ID	Status	Profile name	Profile description	Profile Type	Contributed by
1 1647047390004106	Active	Ebook import	Import for Marymount individual ebooks	Repository	-
2 1526741790004106	Active	Films on Demand	-	Repository	-
3 1554077760004106	Active	Generic ebook import	-	Repository	-
4 1567954720004106	Active	Gomatos Test	Overlay Gomatos records	Repository	-
5 1543175560004106	Active	Ingram IZ	Ingram EOD	New Order	-
6 1557093300004106	Active	Ingram manual	Manual upload of Ingram records	New Order	-
7 1568442470004106	Active	Kanopy	Use for importing Kanopy records	Repository	-

- Click Add New Profile to add a new import profile
- The first page will ask you to choose a Profile Type. In this case, choose Repository.



Choose Profile Type

New Order

Update Inventory

Repository

Discovery

Repository - Used for loading bibliographic records, resulting in the import of bibliographic information and the creation of physical/electronic inventory according to the parameters configured in the import profile.

- The next screen asks you to name the profile and give a description.

- Fill in the originating system (if no match is found use “other”).
- Choose the import protocol you will be using. In this case, we will choose Upload File/s. The other options are FTP and OAI.
- Physical source format for MARC records is Binary
- Source format is MARC21 Bibliographic
- If you know the file name pattern you can enter it, but this is more important for import profiles that use FTP.
- **Be sure to uncheck Use Network Zone.**

Import Profile Details

1 2 3 4 5 6 Save Draft Cancel Next

Profile Details

Use Network Zone

Profile name *

Profile description

Originating system *

Import Protocol Upload File/s

Physical source format XML

Source format MARC21 Bibliographic

Status Active

File name patterns

Cross walk Yes No

Target format MARC21 Bibliographic

- Once you have completed all the necessary fields, click Next
- The next page asks if you’d like to correct or filter the data in any way. Generally these can be left blank or as is unless you wish to specify one of the rules below.
- If you have created an indication rule you would like to use to filter out certain records from your set, you can add it using the Filter drop-down.
- If you’d like to correct your data using a normalization rule you’ve created, you can choose that here as well.
- Finally, if you have a specific validation profile you’d like to see used, you can also choose that here. Generally MarcXML Bib Import is fine.
- Click next when completed.

Import Profile Details

1 2 3 4 5 6 Cancel Save Draft Back Next

Test

Profile Type Repository

Filter

Filter out the data using

Normalization

Correct the data using

Validation Exception Profile

Handle invalid data using MarcXML Bib Import

- The next page asks you to detail your match profile for records. This is important because it eliminates duplicates.
- Under Match Profile choose whether or not you will be importing mixed serial or non-serial items. Generally the answer to this is No.
- Choose the Match Method, generally 035 (Other System Identifier), then enter the system identifier prefix (such as OCoLC).
- Under Match Actions
 - Choose whether you would like to handle problems with matches manually or automatically.
 - Choose how you would like records handled upon a match being found. Generally Do Not Import or Merge are preferable.
 - Check the box to match the record only with the same inventory
 - Choose a merge method, if using Merge. Note: If this is a Network Zone import profile, always choose the Consortium NZ Overlay all fields but local...rule
 - Keep all other options blank.
 - Under Automatic Multi-Match Handling
 - Check Prefer record with the same inventory type (electronic/physical)
 - Check Skip and do not import unresolved records
 - Under Handle Record Redirection
 - Choose Delete under canceled record
 - Choose Merge Method overlay all fields but local
 - Under No Match, choose Import.
- Click Next
- On the Set Management Tags page, you can choose whether or not you would like to publish to OCLC or suppress records from discovery. Leave these as is. Click Next.
- In the Set Management Tags section, leave all conditions at default. Click Next.

Import Profile Details Save Draft Cancel Save

Films on Demand i v

Profile Type Repository

Profile Details Normalization & Validation Match Profile Set Management Tags Inventory Information

Set management tags for all the records imported using this profile

Suppress record/s from publish/delivery <input type="checkbox"/>	Condition	Only for new records
Synchronize with OCLC Don't publish	Condition	Unconditionally
Synchronize with Libraries Australia Don't publish	Condition	Unconditionally

- On the Inventory Information page you will choose the type of information you are dealing with and where the records should go
- Under Inventory Operations choose the type of records you will be importing. It is generally considered a best practice to choose either Electronic or Physical rather than Mixed. The type of inventory you choose will determine the mapping that appears below.
- For electronic inventory
 - Choose whether or not the portfolio is standalone or part of an electronic collection.
 - Choose the corresponding electronic collection. Service is generally Full Text.
 - Choose the appropriate Material Type.
 - Choose whether you are importing a single record or multiple. Multiple is more common.
- Under Extract portfolio information from field, choose the MARC field where the URL information is stored in the bib record. Generally this is the 856 field.
 - Add the subfield. The information is contained in the Extract access URL from subfield. This is usually \$u or \$x.
 - Add any authentication notes necessary
- Choose a default library and check Activate resource.
- Click Save. Your import profile should now be ready to run. It is recommended to test the profile using a small number of records before running it on a large batch.

EOD Import Profiles

Embedded Order Data (EOD) profiles allow you to import records with order data which is used to create attached PO lines. Sometimes, these are overlaid by full records at a later point.

- Creating an EOD Import Profile follows the Repository Import Profile creation until Inventory information is entered. There is an additional tab for PO line information, and a section for fund mapping on the Mapping tab on an EOD profile that need to be completed before it can be run.
 - On the PO line information tab
 - Choose the PO line type
 - Fill in the vendor (or vendors) and the vendor account (Note: the vendor account must be in your list of vendors in Alma)
 - Choose the currency, and the acquisition method (usually purchase or purchase at vendor system)
- Under EOD mapping fill in the fields in which the order information is stored in the MARC record. This information can usually be found or established in vendor

documentation.

- Choose the default PO line owner library, and choose to Map the owner.

The screenshot shows two sections of a software interface. The top section, 'EOD General Parameters', contains several dropdown menus and checkboxes: 'Physical PO Line type' (Physical - One Time), 'Electronic PO Line type' (Electronic Book - One Time), 'Multiple vendors' (checkbox), 'Vendor' (YBP Library Services), 'Vendor account' (MONO), 'PO Line currency' (USD), 'Decimal point location' (0), and 'Acquisition Method' (Purchase). The bottom section, 'EOD mapping', contains a grid of input fields for mapping source fields to subfields. The 'Vendor Reference Number field' is mapped to subfield 'a', and the 'List price field' is mapped to subfield 's'.

- If necessary, go to the mapping tab and map. You must use the existing fund code from Alma and ensure it matches the fund code from the vendor EOD profile.
 - Funds can also be added at the point of invoicing, if necessary.

The screenshot shows a 'Fund Mapping' table with a table header and 13 rows. The table has two main columns: 'Source value' and 'Fund'. Each row has a three-dot menu icon on the right. The table is as follows:

Source value	Fund
1 AA	Applied Arts (Fashion)
2 BBA	Bachelor's Business Admin
3 BIO	Biology
4 CMD	Communication
5 CE	Counseling
6 CJ	Criminal Justice
7 ECO	Economics
8 ED	Education
9 EN	English/Languages
10 FA	Fine Arts
11 FLP	Forensic Legal Psychology
12 HCM	Health Care Management
13 HPR	Health Human Performance

- Click save when completed.

Update Inventory Import Profiles

When EOD information is added, or if you are overlaying or merging records with new ones, you can use an Update Inventory Import Profile.

- Follow the instructions for Profile details for Repository and Normalization and Validation. You may choose to remove Vendor data at this time since the order record has already been created.
- In the Match Profile tab
 - If choosing to merge, use the Consortium NZ Overlay all fields but local...merge method.
 - Disable Merge and Combine

Pay special attention to the match profile to ensure the match method is correct. In most cases you will be matching by PO line, but 035 (other system number) is also a reliable match-point for overlays or merges that are not for EOD records.

- Under Match Actions choose whether you'd like to merge or overlay the records.
- Under Automatic Multi-Match Handling check Prefer record with the same inventory type (electronic/physical)
- Under Merge Records and Combine Inventory for Multi-Match
- In the Mapping Tab
 - Choose the fields from the incoming records to map. Location fields, number of items, and material type are the most important.
 - Under Holdings Record Mapping check update holdings call number
 - Leave Receive item unchecked.
 - Under the PO Line Information tab be sure to enter the vendor reference number field and subfield if you are matching by PO line.
 - The mapping tab may be left blank.
- Save the import profile.

Manually Running an Import Profile

- Prepare your records for import using MarcEdit or a similar program. Ensure the mapped fields and subfields in the import profile match the fields in the records.
- Navigate to Resources > Import > Manage Import profiles. Select Run under the row actions list (...), then select file to upload your record file.
- Once the records are uploaded click Run.
- The job will run and you will be able to view the results and resolve any errors.

Setting up an Import Profile via FTP

Marymount has two import profiles set up using FTP. One is for GOBI and the other is for Ingram. The instructions will detail general set-up of FTP import profiles, as well as specifics for the GOBI and Ingram profiles at Marymount.

Basic Set-up

- Choose the appropriate import profile type (EOD, repository, overlay, etc.)
 - On the Profile Details tab
 - Uncheck Use Network Zone
 - Create a profile name and add a description, if desired.
 - Choose the originating system (if no system is listed, choose Other)
 - Enter the file name patterns.
 - You can find the file name patterns by opening the file from the FTP server and looking at the file. Use the * as a wildcard, and add in the file extension. For example: *.mrc for MARC records for *.ord for order records.
- Import protocol will be FTP
 - Choose the appropriate physical source format (usually binary), the appropriate encoding format (usually UTF-8), the source format should be MARC21 Bibliographic. You do not need to set the status as active yet.
 - Under scheduling
 - Choose which files you would like to import (generally New)
 - Decide when you would like to schedule the job to run. Note: Keep the scheduler status inactive until you have tested the profile.
 - Under FTP information
 - Create a description for the FTP server
 - Enter the server name, the port used (21 or 22), and the username and password.
- Designate the input directory
 - You can leave the Max number of files and Max file size as the default of 1 and 1MB, respectively.
 - Choose FTP server secured if the server is secure (not necessary)
- Test the connection. If you see files available and the get a message that the connection is successful, you can continue creating the import profile.

Relevant Documentation

- [Managing Import Profiles](#)

Last updated 2/27/2020

Revision #9

Created 24 April 2023 20:56:41 by Aaron Krebeck

Updated 8 November 2023 22:00:12 by Jackie Saavedra