

Setting Up Alma Profiles for Importing Records

1. “Repository” Configuration: Loading OCLC Bib Records Without Order Information

Resource Configuration>Record Import>Import Profiles

Edit the out of the box “Repository” type profile.

| | | | |
|------------------------|--------------------------------------------|--------------------|---------------------------------------------------------------|
| Use Network Zone | No | | |
| Profile name * | Load Bib Records w/o order info - Books | | |
| Profile description | Load Bib Records without order information | | |
| Originating system * | WorldCat | File name patterns | |
| Import Protocol | Upload File/s | Cross walk | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Physical source format | Binary | | |
| Encoding format | UTF-8 | | |
| Source format | MARC21 Bibliographic | Target format | MARC21 Bibliographic |
| Status | Active | | |

To import a file of MARC records (as was available in Voyager’s Web Admin), the most important configuration is in the Profile Details. Other elements of the profile(sections b-e) may be customized according to local practice.

a) Profile Details

Originating system: Worldcat

Import Protocol: Upload Files

Physical source format: Binary

Encoding format: UTF-8

Source Format: MARC21 Bibliographic Target Format: MARC21 Bibliographic

Status: Active

b) Normalization & Validation

| | | |
|------------------------------|---------------------------|------------------------------|
| Filter | Filter out the data using | |
| Normalization | Correct the data using | Marc21 Bib normalize on save |
| Validation Exception Profile | Handle invalid data using | MarcXML Bib Import |

c) Match Profile

| | |
|-------------------------|-------------------------------------|
| Match Profile | |
| Serial match method | Unique OCLC Identifier Match Method |
| Non Serial match method | Unique OCLC Identifier Match Method |

| | |
|---------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| Match Actions | |
| Handling method | <input checked="" type="radio"/> Automatic <input type="radio"/> Manual |
| Upon match | <input type="radio"/> Merge <input type="radio"/> Overlay <input checked="" type="radio"/> Do Not Import <input type="radio"/> Import New Record |
| Merge/Overlay | |
| Merge method | Conditional subject headings |
| Allow bibliographic record deletion | <input type="checkbox"/> |
| Do not Override/merge a record with lower brief version | <input type="checkbox"/> |
| Unlink bibliographic records from community zone | <input type="checkbox"/> |
| Do not override/ merge record with an older version | <input checked="" type="radio"/> Disabled <input type="radio"/> Consider Originating System <input type="radio"/> Ignore Originating System |

| | |
|------------------------------------------------------------------|-------------------------------------|
| Automatic Multi-Match Handling | |
| Disregard matches for bibliographic CZ linked records | <input type="checkbox"/> |
| Disregard invalid/canceled system control number identifiers | <input type="checkbox"/> |
| Prefer record with the same inventory type (electronic/physical) | <input type="checkbox"/> |
| Unresolved Records | |
| Skip and do not import | <input checked="" type="checkbox"/> |

d) Set Management Tags

| | |
|-----------------------------------------|--------------------------|
| Suppress record/s from publish/delivery | <input type="checkbox"/> |
| Synchronize with OCLC | Don't publish |
| Synchronize with Libraries Australia | Don't publish |

e) Inventory Information

None is an option (see “Inventory Operations” at the top). As a minimum, I would recommend setting up the default holdings fields: Default Library and default location.

The screenshot shows the 'Inventory Operations' configuration page. At the top, there are radio buttons for 'Electronic', 'Mixed', 'Physical' (selected), and 'None'. Below this is the 'Physical Item Mapping' section. It includes a 'Material type' dropdown set to 'Book', a 'Mapping Policy' section with 'Basic' selected and 'Advanced' as an option, and several input fields for 'Library field' (049), 'Location field' (981), 'Default library' (Odum Library), 'Number of items field' (980), 'Barcode field', 'Item policy field', and 'Alternative Call Number'. Each of these fields has a corresponding 'subfield' dropdown. To the right, there is a 'Default location' dropdown set to 'Acquisitions Order' and a 'Default number' input field set to '1'. At the bottom, there is a 'Call Number Mapping' section with a checkbox for 'Update holdings call number' which is checked.

2. “New Order” Configuratio: Loading OCLC Bib Records With Order Information (EOD Imports)

If you wish to load records and create order data (i.e., POs) at the same time, choose the Profile Type “New Order.” Most of the configuration will be identical to 1, above. The critical extra information will be recorded in the tab “PO Line Information.”

PO Line Information

The screenshot shows two configuration pages for EOD imports. The top page is 'EOD General Parameters' and the bottom page is 'EOD mapping'. The 'EOD General Parameters' page includes a 'Physical POLine type' dropdown set to 'Print Book - One Time', a 'Multiple vendors' checkbox, a 'Vendor' dropdown set to 'YANKEE BOOK PEDDLER', a 'Vendor account' field, a 'PO Line currency' dropdown set to 'USD', a 'Decimal point location' dropdown set to '0', and an 'Acquisition Method' dropdown set to 'Purchase'. The 'EOD mapping' page includes several input fields for 'Additional PO Line Reference', 'Vendor Reference Number field', 'Vendor Reference Number type field', and 'List price field' (set to 980). Each of these fields has a corresponding 'subfield' dropdown, with the 'List price field' subfield set to 'b'.

The EOD General Parameters will be familiar to anyone who has created POs in Alma. The one unfamiliar field is “Decimal point location.” This field determines how many spaces to the left the decimal

in the price field should be placed. (e.g., If set to 2, “2499” would set the line item price to 24.99.) The EOD mapping tab is defined by the Vendor and/or local institution.

3. Running an Import

Click on Acquisitions/Import/Import. Click on the “Actions” button to the right of the import profile you would like to use. Select “Run Import.”



Click in File box and browse to file location. Add a descriptive label. Click the “Add” button.

 A screenshot of a file upload form. It has three main input areas: "File" with the text "EODTestImport.mrc", "Label" with the text "A test file to try one model of EOD importing", and "Notes" which is an empty text area. To the right of the "Notes" field is a blue button labeled "Add".

The file is added to the Files list. Note that it may be broken into multiple smaller files if there is a large record count. Click the blue “Submit” button.


 A screenshot of a table displaying file information. The table has a header row with "Date" and "Actions". Below the header, there is one row with the date "12/14/2016". Above the table, there is a status bar showing "1 - 1 of 1 Records", a "Columns" dropdown, and a "Tools" button. Below the table, there are "Cancel" and "Submit" buttons.

Click the “Run Import” link to run the submitted import.

 A screenshot of a progress bar. It has two main sections: "Time Ended" and "Files Processed". The "Files Processed" section shows "0%" and a small icon. To the right of the progress bar is a blue button labeled "Actions".

[Back](#) [Run Import](#)

Click on “Monitor and View Imports.”

| Time Ended | Files Processed | |
|---------------------|----------------------------------------------------------------------------------------|---------|
| 2016-12-14 14:20:48 | 100%  | Actions |

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