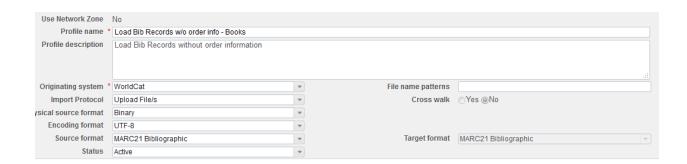
Setting Up Alma Profiles for Importing Records

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.



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

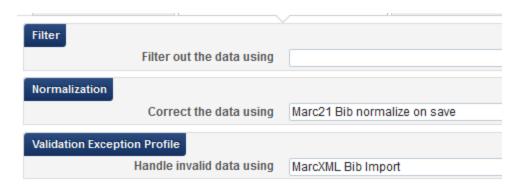
Originating system: Worldcat Import Protocol: Upload Files Physical source format: Binary

Encoding format: UTF-8

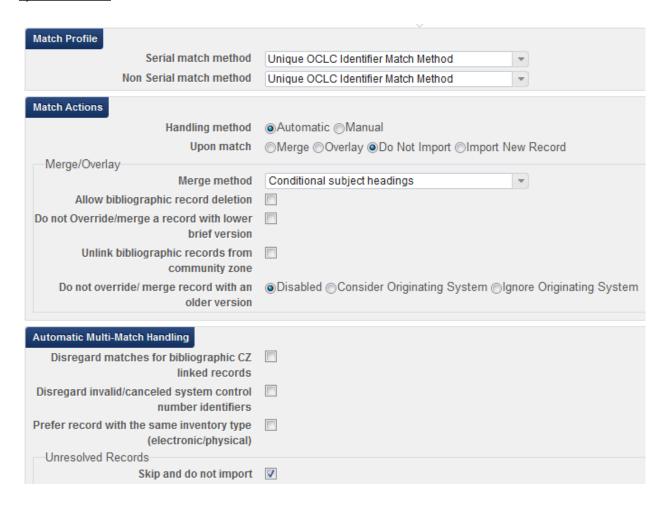
Source Format: MARC21 Bibliographic Target Format: MARC21 Bibliographic

Status: Active

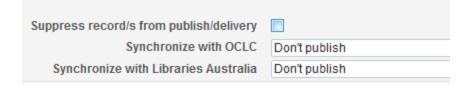
b) Normalization & Validation



c) Match Profile

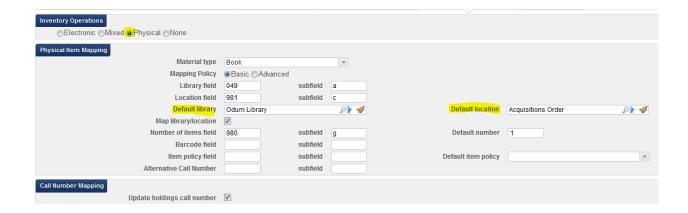


d) Set Management Tags



e) Inventory Information

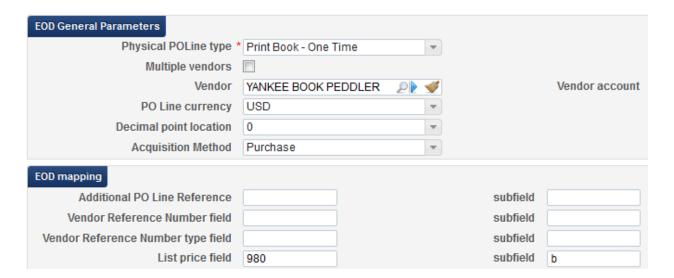
None is an option (see "Inventory Operations" at the top). As a minimum, I would recommend setting up the default holdings fields: Default Library and default location.



2. "New Order" Configuratino: 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 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

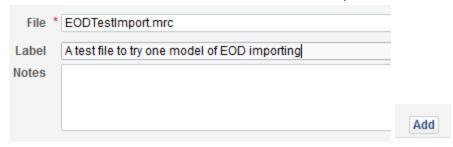
in the price field should be placed. (e.g., If set to 2, "2499" would set the line item price to 24.99.) The EOD mapping tab is defined by the Vendor and/or local institution.

3. Running an Import

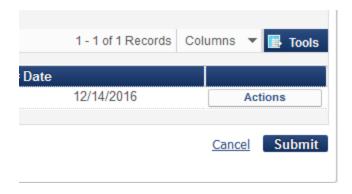
Click on Acquisitions/Import/Import. Click on the "Actions" button to the right of the import profile you would like to use. Select "Run Import."



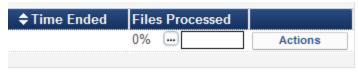
Click in File box and browse to file location. Add a descriptive label. Click the "Add" button.



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.



Click the "Run Import" link to run the submitted import.



Back Run Import

Click on "Monitor and View Imports."

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

Back Run Import