

## Alma Essentials – Resource Management

# Import Bibliographic Records in Batch

Hi! In this session, we'll learn how to import bibliographic records into Alma from an input file, view the import results, and troubleshoot any errors.

You can import records into Alma's repository from an originating system, such as a cooperative cataloging project, or Alma itself, for example to re-import records that have been exported for cleanup.

The originating system provides an input file in a format such as MARC XML.

You then run an Import in Alma (either manually or scheduled) to retrieve the file and import the records into the repository.

Imports in Alma are configured and run using Import Profiles. To learn how to configure a new Import Profile, please refer to the documentation.

To manually run an Import, go to Resources: Import > Import. Here you can see the various Import profiles configured for your institution. Each Import Profile is specifically configured to the needs of that import, accounting for the input file format, the matching routines used, etc. You can filter by Profile Type: Repository is used for loading bibliographic records, optionally adding physical or electronic inventory. Other entities in Alma have their own Import Profiles. Let's filter by Repository.

Find your desired Import Profile and click Options > Run. Click Select File, browse for the input file, and click Add. You may include several input files if needed. Click Submit. This takes you to the Monitor and View Imports page, where you can see the job that was just submitted. If your import is still running, you can click Refresh. Our job has completed successfully.

Under the Options for our job, you can view the Imported Records. In our example, the records have been imported with inventory. Let's return to the Monitor Imports page. You can do so under Resources > Import: Monitor and View Imports, or simply by clicking Back.

We can also view a Report of our job, detailing information such as the start and finish time and the results of the import. You can expand the various sections of the report, such as Bibliographic Records imported. Each row provides actions such as previewing the records or downloading them in XML format.

Back in Monitor Jobs, you can view details of the files imported, and the Job Events page details any errors that may have occurred during the import, to help with troubleshooting.

Import jobs can fail or complete with errors for various reasons. To see jobs that require error handling, filter the jobs by Status filter: Manual Handling Required. Click on the status of the job you wish to handle.

This takes you to the Resolve Import Issues Page. You can also navigate here via Resources > Import: Resolve Import Issues. Here you can handle issues with Matching, Validation, Errors. The Matching tab lists files with records matching one or more existing records in Alma which were not resolved automatically during import. You can act on the file level, by

selecting the files, and either rejecting the matched records, rejecting the entire file, or approving the Import to Merge the records. Alternatively, you can handle matched records individually. For the desired file, click Actions > Edit. To handle a record, click View Matches. Here you can view the record from the file and the matched records. In the case of multiple matches, you can select the matching record. And you can resolve the match using one of several options.

Back in the Resolve Import Issues page, let's look at the Validation tab. Here are found files with records that were not imported due to errors found when validating the records. Here too, you can select several files and either reject the unvalidated records or reject the entire file. You can then edit the rejected file and reimport it. Alternatively, you can import all or some of the unvalidated records for a file, under Options > Edit.

Finally, the Errors tab lists files that failed due to various errors. You can Download a failed file, correct it outside of Alma, and reimport it.

Thanks for joining!