

## Alma Essentials – Acquisitions

# Import Records in Batch for New Orders

Hi! In this session, we'll learn how to import bibliographic records into Alma from a vendor-provided input file, when processing new orders. Then we'll view the import results and troubleshoot any errors.

You can import records into Alma's repository from your vendor's interface. The vendor 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.

If the input file includes embedded order data (or EOD), Alma will generate the necessary Purchase Order Lines, thus automating the acquisitions and cataloging workflow. For this to work, the Import Profile must be configured accordingly. You can learn about Import Profile configuration in the documentation. In this session, we will use an existing Import Profile .

To manually run an Import, go to Acquisitions: 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, depending on the record format, vendor, fund used, and so on.

You can filter by Profile Type:

New Order is used for loading bibliographic records with embedded order data, resulting in new bibliographic records, inventory, and Purchase Order Lines.

Update Inventory is used for enriching imported records and optionally adding inventory, based on the Purchase Order Line information.

Let's filter by New Order. Find your desired Import Profile and click Options > Run. Click Select File. Browse for the EOD import 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. Note that each record already has an order line. Let's return to the Monitor Imports page. You can do so under Acquisitions > Import: Monitor and View Imports, or simply by clicking Back.

Also under the Options for our job, we can view the Purchase Order lines created. Note that the PO Line status is In Review and the Purchase order still has not been created. You can review and order these Purchase Order Lines under Acquisitions > Purchase Order Lines: Review.

Back in Monitor Jobs, 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 on 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 Acquisitions > Import: Resolve Import Issues. Here you can handle issues with Matching, Validation, and 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 one or more 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!