Alma Administration – Resources  
Configuring Import Profiles

Hello, import profiles are one of the ways you can import records into Alma. They are used to define the settings for how records from external sources will be imported.

In this session we will review the metadata import workflow while creating a repository import profile.

From the beginning where the data is imported into Alma, which can be from several sources, through the indication, Normalization and Validation processes, the match and merge step, managing the profile's tags, and if needed, determine the physical or electronic inventory. Each of these steps needs to be configured. This session gives a high-level overview of each step in the process. To get detailed explanations about each parameter go to the Managing Import Profiles page in the Online Help.

To create a new import profile, go to Resources > Import > Manage Import Profiles**.**

This page displays the status, name, description, and type of each of the existing import profiles. Click Add New Profile. This is a list of the profile types along with a brief description of each of them.

We will create a Repository type profile, but let's look at what happens when we select a different type, like New Order. Displayed is a description of this type – it is used for loading bib records that include embedded order data and will create PO lines and inventory.

So let's choose Repository**.** This profile type is used for loading bib records. This process may create physical and/or electronic inventory – according to the parameters we will configure in the profile.

Click Next, and now we're in step 2 out of 6 in the wizard. Enter a Name and Description – be as specific as possible so you can later easily identify when this profile will be used. Choose the source of the records – I have a source file that came from the Library of Congress.

If you set the Import Protocol as FTP, you can then schedule the import to run at different intervals. Configure the rest of the FTP information as needed. I’m going to set this back to a manual upload.

Fill in the rest of the information. Let's define a Physical Source Format, I’ve selected XML.

And choose the Source Format –I've selected MARC21 Bibliographic

My Target format will also be MARC21 Bibliographic. Setting the Status to Active means that this profile will display as an option when running an import job. I’ll click next to move to the next step of the wizard.

This is where you can set up filters on your records, based on indication rules.

Incoming data can be corrected using a Normalization rule. For example, I know that my records contain 029 fields that don't apply to me, so under Normalization, correct the data using, I choose to delete them when importing the records.

The Validation Exception Profile determines how to handle records that didn't import correctly. You can add indication rules, normalization processes and validation rules of your own – read more about it in the Online Help.

Click Next, Now here we are at step number 4. In this step you can configure how Alma identifies and manages matched records.

First, in the Match Profilesection select a match method. There are several options for serial and non-serial records. For example, if you're importing brand new records, you may choose the ISSN 024 035 Match Method and the ISBN 024 035 Match Method. Read about the specifics of each match method in the Managing Import Profiles page in the Online Help.

If Alma detects that an incoming record is a match to an existing record, the choices made in configuring Match Actionswill determinehow Alma will act.

The manual option will require you to resolve each match manually. Selecting automaticwill direct Alma to resolve the matching according to the Upon match behavior you've selected and your Automatic Multi-Match Handling choices. You can either Merge or Overlay the existing record, Not Import the incoming record, or Import the incoming record.

You can ask to consider the inventory type when determining a match – when checked, if the inventory type is not the same, there will not be a match.

We’ll set the Merge method to Overlay all fields but local. Merge methods are created in the Metadata Editor. Select Action options allow an import to delete records, can prevent a low-quality record from overlaying a good quality record, and can prevent the import process from overriding the originating system. Now let's update the Community Zone record with the new link.

when you selectAutomatic for Handling Method. The Automatic Multi-Match Handling section appears. The options in this section work hierarchically. Only the selected options are considered.

When you select Merge, The Merge Records and Combine Inventory for Multi-Match section is used to merge and combine two or more previously existing duplicate records into one record that can subsequently be merged or overlaid with the new record that you are trying to import. Updating the holdings record call numbers can be set to be part of the process as well. Setting Merge and Combine as Disabledmeans that entire section is ignored.

If no matches are found Select Do Not Import or Import. I will select Import.

Click Next to continue to step number 5, the set management tags for all records imported using this profile.

Here, you can set tags that relate to whether these records should be suppressed from discovery, whether they should be suppressed from External search, whether you want them to be automatically synchronized with OCLC or Libraries Australia. For each tag, select a condition – Only for new records or Unconditionally. Once you’re done, click Next to the last step – Inventory Operations.

Choose the inventory type you want to create, if any.

If your incoming records are for electronic resources, you need to map the portfolio information.

First enter the general information - like whether to delete the existing portfolios, the material type and so on.

Then, you need to map the fields and subfields in which the portfolio's information is found – where to find the portfolio URL, description, library and then select whether to automatically activate the resource once it's imported.

If you're importing physical records, select whether you want to create items and holdings, or holdings only.

Select a material type – lets choose Book, and the field from which you want to map the item information – I’ll enter 905 here– and the field column for all parameters is automatically populated.

Now you can indicate, where each detail exists in the file.

Default values that are entered will be used if the field is blank or an incorrect value is indicated in the input file. Last, use the Add Holdings Mapping to identify the fields from the imported bibliographic record with the fields of the new holdings record in Alma. There is no need to enter information for the 852 $b and $c as those fields are already mapped.

The Update holdings call number updates the holdings record with the call number that is part of the imported bibliographic record.

At any step, you can Save Draft, the new profile will be saved as Inactive.

Let's find it. I'll look by description. And edit it, the steps will display as tabs.

Once you're done, you can change the Status to Active on the **Profile Details** tab and **Save** the import profile.

Now you can run the import profile you've created to import records.

Thanks for watching!