Alma Administration – Resources

**Publishing Profiles**

Publishing Profiles enable your institution to send information about your bibliographic or authority records from Alma to other systems. There are many kinds of publishing, such as: to an external catalog, Primo, Google Scholar, an RSS feed, and more.

In this session, we will explain how to set up a publishing profile, using the example of publishing to an external catalog such as OCLC.

The process of setting up a publishing profile is different depending on the type of publishing, but there are some steps common to most publishing profiles:

1. Configuring the profile, which includes defining how and where the information will be published
2. Scheduling when the job will run
3. Identifying the records to be published, either by creating a set or marking the records

In Alma, open the Resources menu, under Publishing, select Publishing Profiles. The Institution tab shows all the publishing profiles available at your institution. The community tab shows publishing profiles created by other institutions that you can copy.

To create a profile from scratch, select Add Profile, and choose General Profile, Research General Profile, or RSS, which each require somewhat different parameters. However, it is likely that the type of profile you need is already listed here. Alma comes with several of the most common types of publishing profiles, which can be modified for the specific needs of your institution.

By the way, please do not modify the profile Publish electronic records to Central Discovery Index. This one has been configured by your implementation team to populate your Primo correctly.

We will use this one for our example today: Publish bibliographic record (DataSync) to OCLC

Click the row action button and select Edit. After the name and description, you will need to enter your OCLC institution symbol, and other information.

Publishing mode - If your institution had been publishing to OCLC with your old ILS, and you want to continue to do so with Alma, then you will need to start with Baseline publishing. Just after Go Live, before you do any cataloging in Alma, you need to run this profile in Baseline publishing mode, just once. After that, switch this profile to Incremental Publishing Mode, which will publish any changes on a regular basis. If, on the other hand, this is your institution’s first time publishing to OCLC, or if you have decided to coordinate with OCLC to republish all your records, for whatever reason, use the Full Publishing Mode instead of Baseline, then switch to Incremental.

Status must be Active for the profile to work. Click Edit Scheduling to choose the frequency and timing for the scheduled publishing job.

Choose the FTP configuration and enter the Sub-directory. Contact OCLC if you are not sure what to put here.

For RSS publishing profiles, you must create a set of records to be published, and then input the set name into the profile.

For OCLC, and many other publishing profile types, the records themselves are marked for publishing. We will demonstrate that in a moment.

When you have finished making changes to the profile, remember to Save.

Records can be marked for OCLC publishing either individually or in bulk. To mark an individual record, open it in the Metadata Editor. Open Record Actions > Set Management Tags > Export to WordCat. Here you have the options of Don’t Publish, Publish Holdings Only, or Publish Bib. Select the option that is right for the publishing profile you are using. In our case, we will choose Publish Bib. Checking either of the Publish options will include this record the next time the publishing to OCLC job is run. Force export to WorldCat will publish this record immediately, without waiting for the job to run.

To mark records in bulk, create a set and then use the Set Management Tags job.

Check the box for Synchronize with OCLC. In the dropdown, you have the same options as before: Publish Bibliographic, Publish Holdings only, and Don’t Publish. For instructions on how to create a set or run a job, see the Knowledge Center.

That’s how to set up publishing to OCLC. As mentioned before, each type of publishing profile is set up differently. Learn about the specifics of other publishing profiles in Alma Online Help.

Thanks for joining us.