

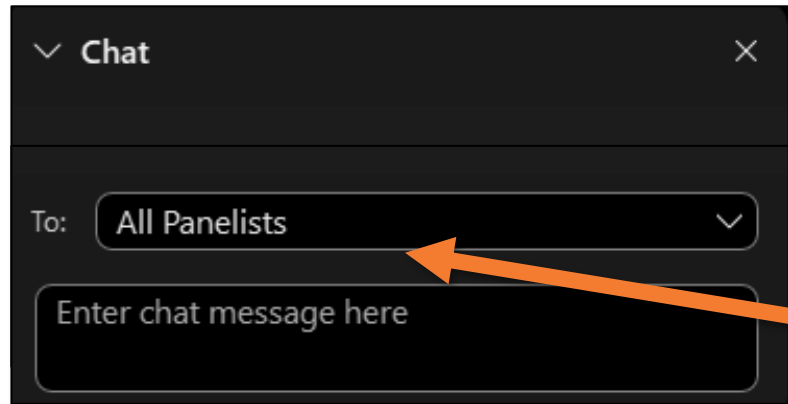
The logo consists of a white hexagon with a yellow border and a blue ribbon-like shape behind it. The text "Alma Insights" is written in a dark blue, sans-serif font inside the hexagon.

**Alma
Insights**

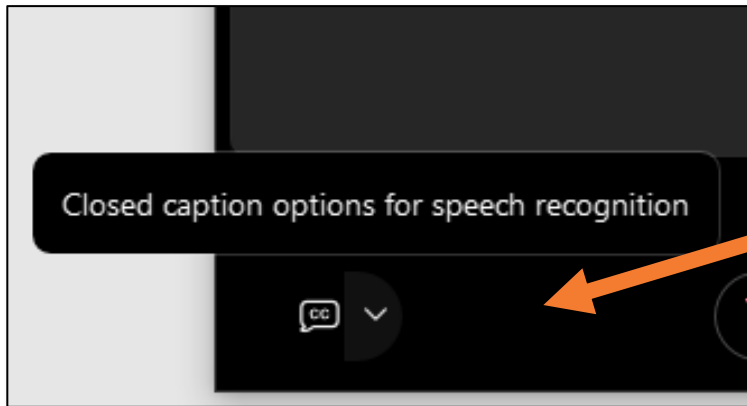


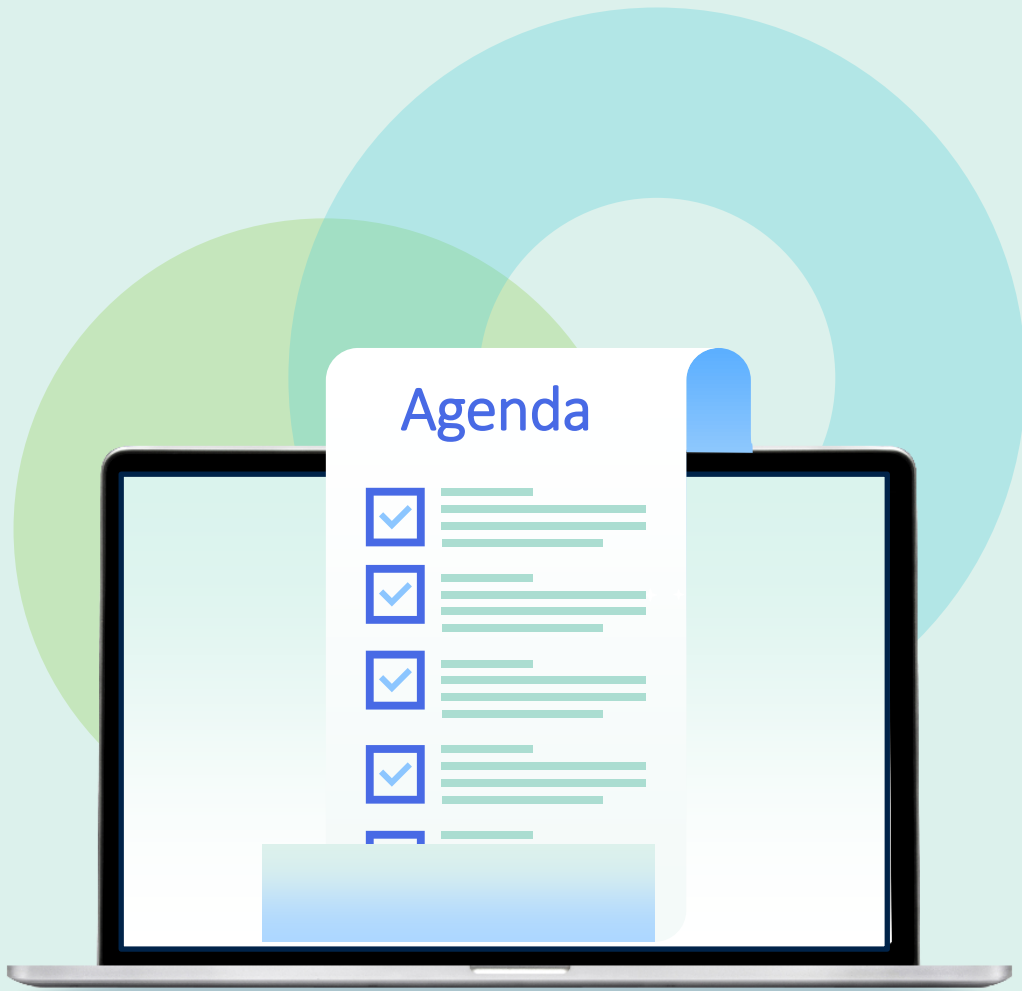
An Introduction to Alma Import Profiles

A few points about WebEx



- Technical issues? Exit and rejoin the WebEx session
- Submit questions via WebEx Chat: Select **All Panelists** in the **To:** dropdown menu
- Turn captions on and off in the lower-left corner of the WebEx screen

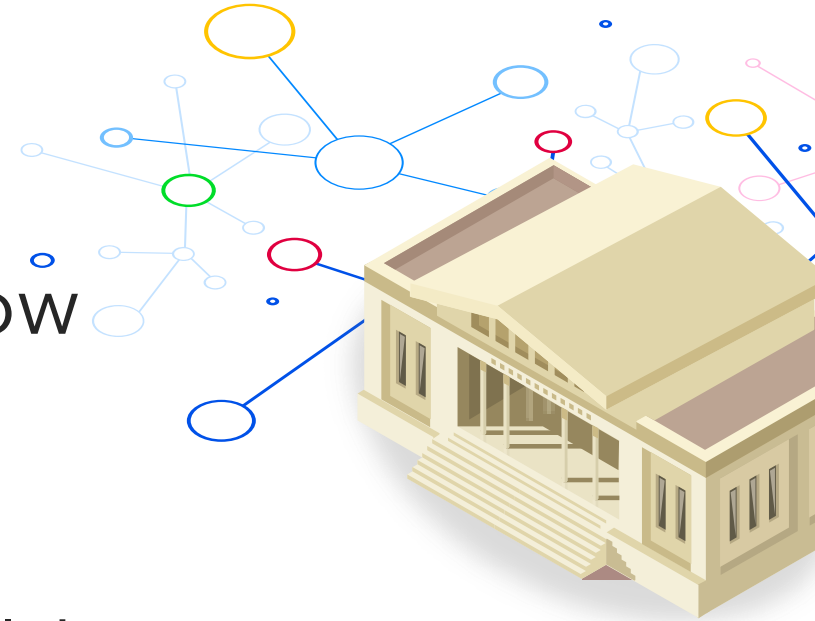




- Introduction
- Import Profile Types
- Creating an Import Profile
- Running an Import Profile
- Monitor and View Import Jobs
- Resolve Import Issues

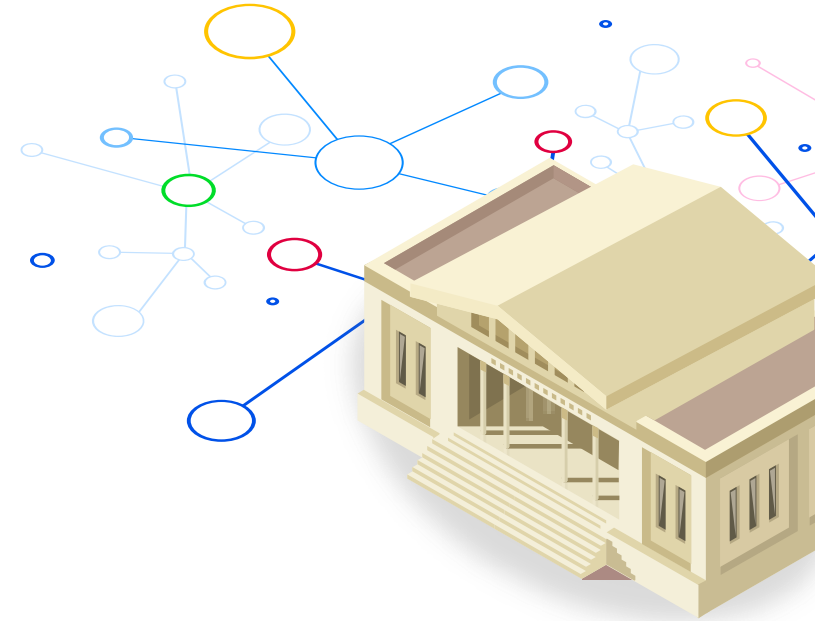
What is an import profile?

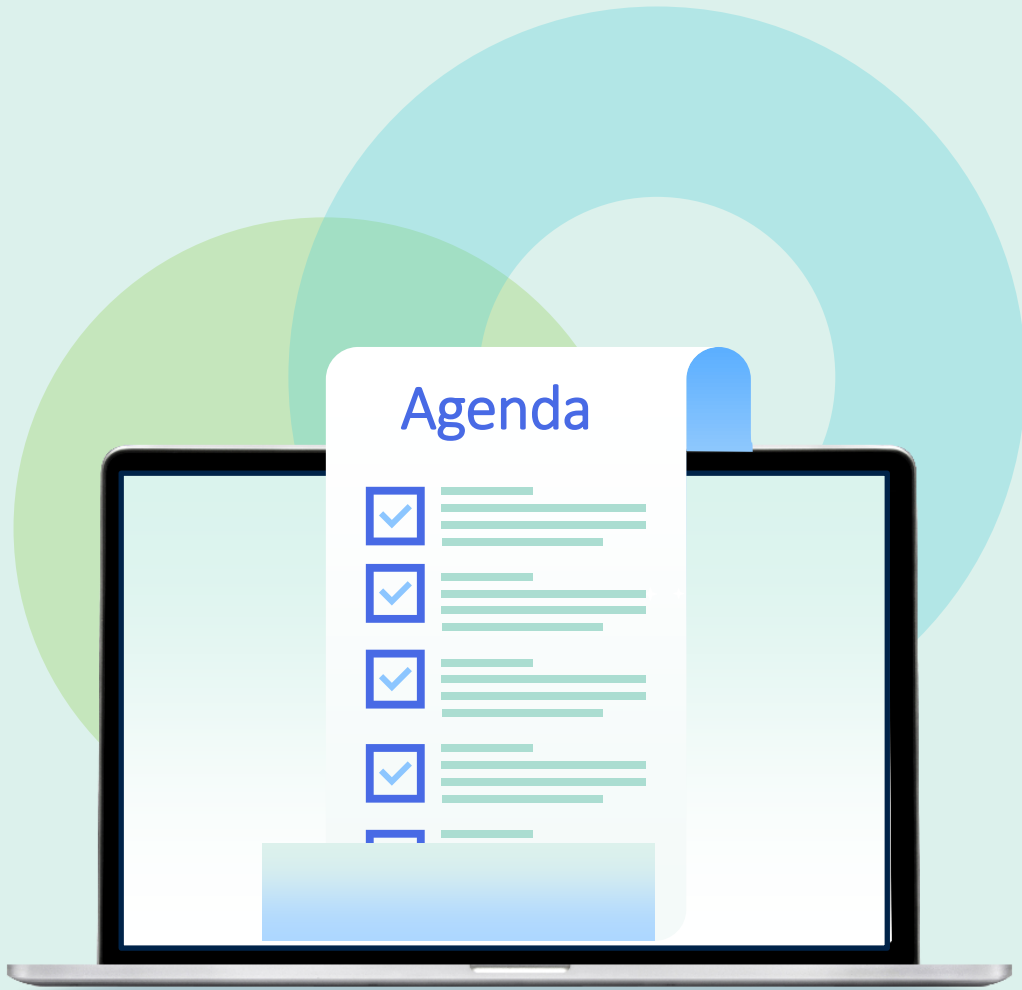
- Load a file containing multiple records in bulk
- Normalize and validate records
- Match to existing records and control how records are merged or overlayed
- Create new records and/or inventory
- Customize mapping of bibliographic fields into inventory information



Why use an import profile?

- Automate the process of loading records
- Connect directly with vendors to reduce staff handling
- Streamline normalization process
- Upgrade existing records
- Make high-quality records available to patrons more quickly





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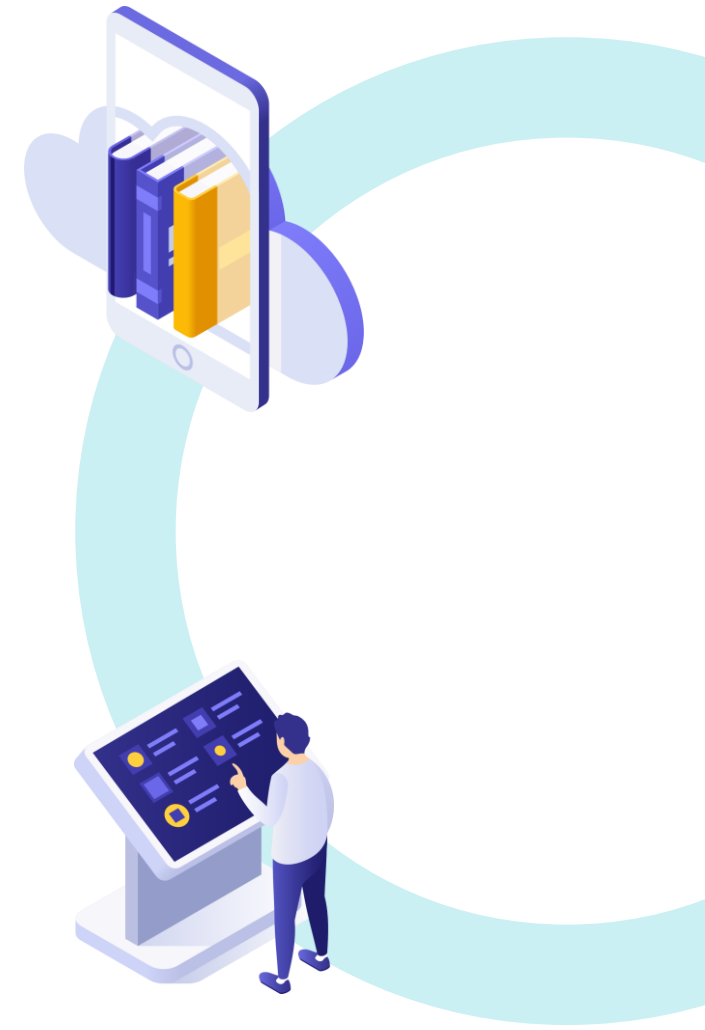
Import Profile Types

- New Order
- Update Inventory
- Repository
- Authority
- Initial Authority
- Digital
- Collection
- Discovery



New Order & Update Inventory Imports

- New Order
 - Bibliographic records with embedded order data (EOD)
 - Used to create PO Lines and physical/electronic inventory
- Update Inventory
 - Used to update holdings/items/portfolios associated with PO Lines
 - Shelf-ready material
 - Often used in conjunction with a New Order profile



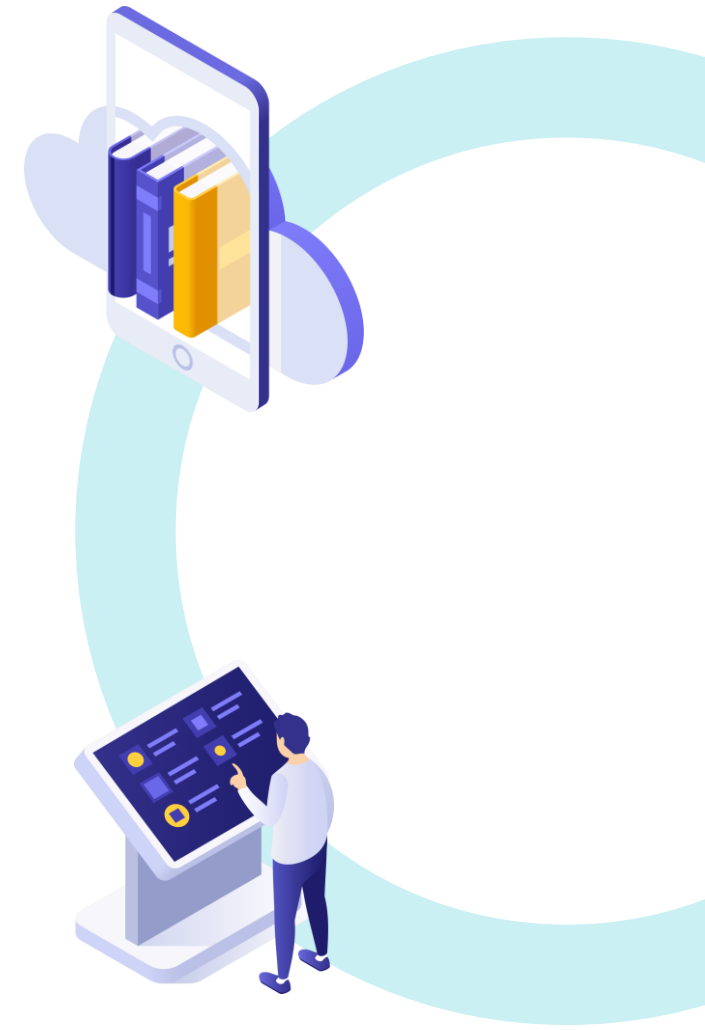
Repository Imports

- Repository
 - Load or update bibliographic records
 - Create physical/electronic inventory
 - Helpful for ongoing maintenance of Alma records



Authority & Initial Authority Imports

- Authority
 - Update and/or create authority records on an ongoing basis
- Initial Authority
 - Completely reload authority records
 - Any matched authorities will be deleted and replaced



Digital Imports

- Digital
 - Load bibliographic records for digital inventory
 - Two types:
 - Local – used to load digital resources stored locally
 - Remote – import records for resources stored in a remote digital repository



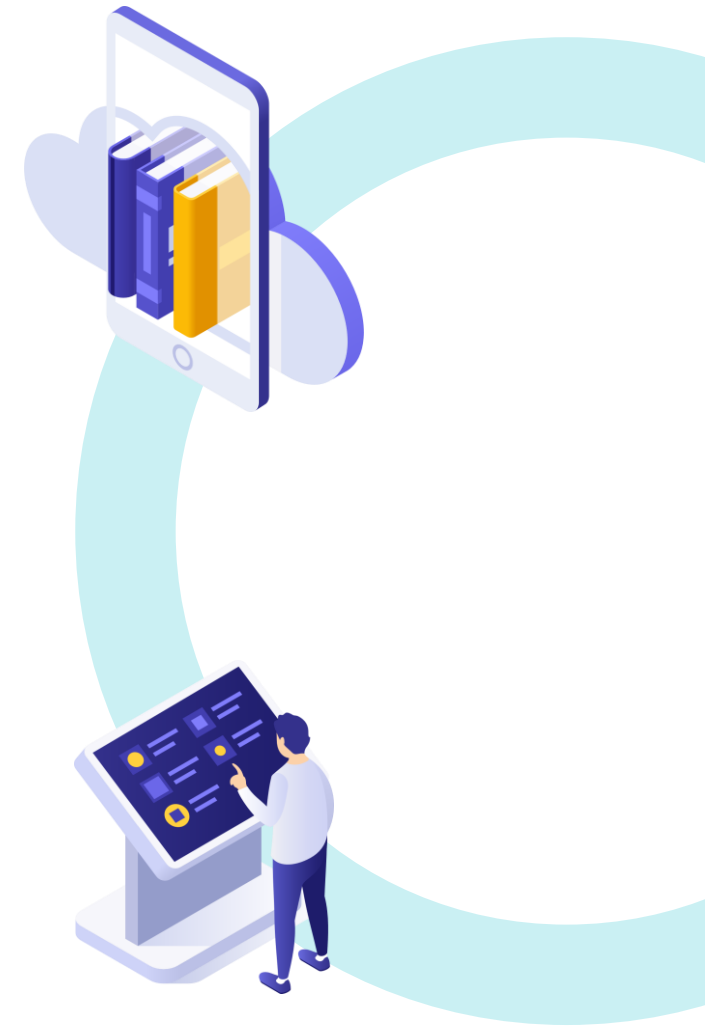
Collection Imports

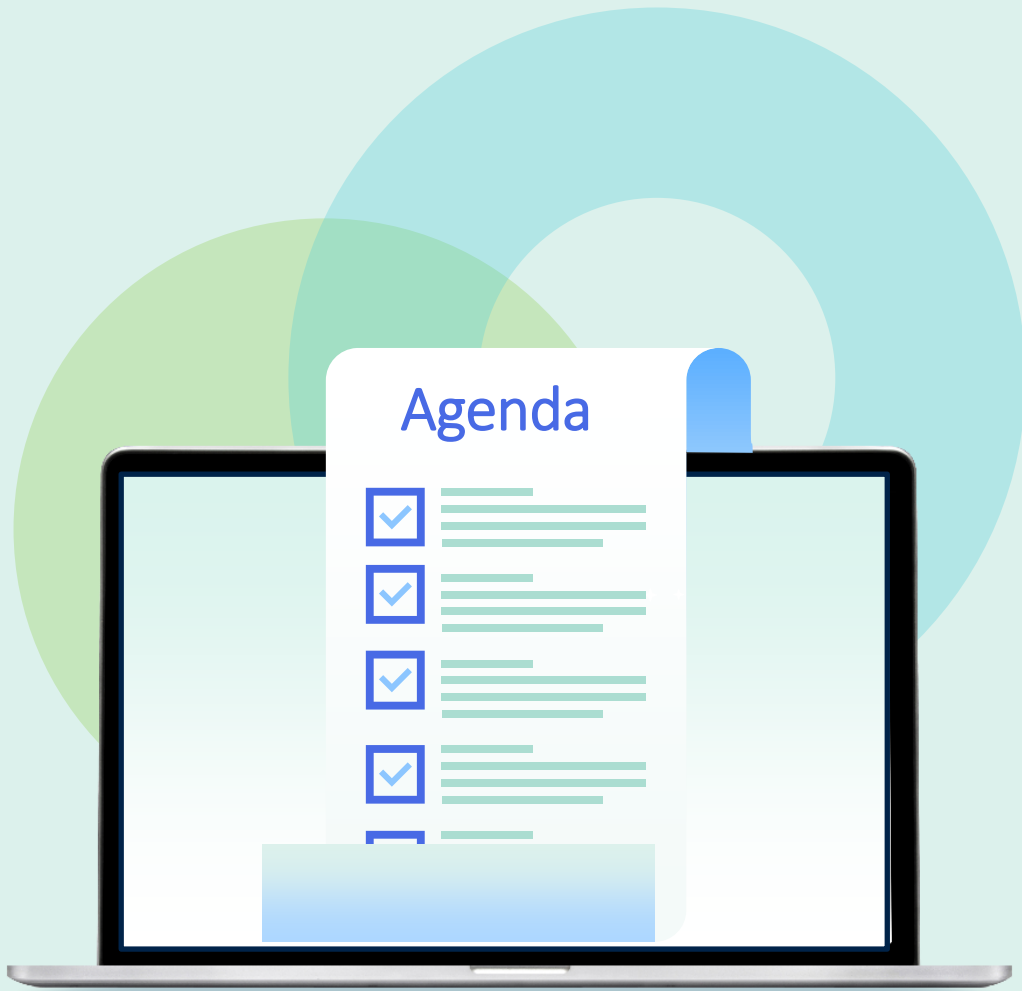
- Collection
 - Create top-level collections with sub-collections
 - Loads an encoded archival description (EAD) or OAI-PMH ListSets file



Discovery Imports

- Discovery
 - Load records from external systems for discovery in Primo VE
 - Records will not appear in Alma search





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Roles

- To create and configure import profiles, you must have one of these roles:
 - Catalog Administrator
 - Acquisitions Administrator
 - General System Administrator
- Additional roles for specific import types:
 - Discovery Administrator
 - Digital Inventory Operator



Access Import Profile Configuration

- Resources > Import > Manage Import Profiles
or
- Acquisitions > Import > Manage Import Profiles

Import

Import

Upload Single Record From File

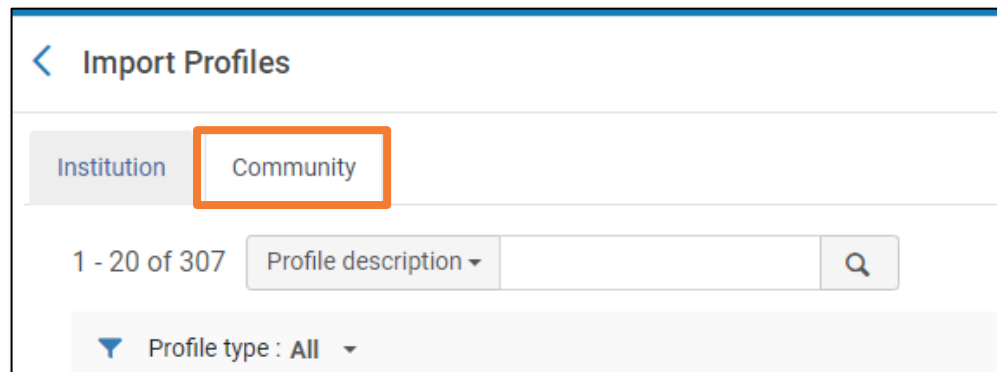
Monitor and View Imports

Resolve Import Issues

Manage Import Profiles

Copy an Import Profile from the Community

- Community tab
 - Includes import profiles shared by other Alma institutions
 - Can view details of the import profile and copy to your institution



Use a Network Zone Template

Network can define an import profile as a Template

Profile Details

Profile name *

Network Import Profile

Profile description

Originating system *

Other

Import Protocol

Upload File/s

Physical source format

Binary

Encoding format

UTF-8

Source format

MARC21 Bibliographic

File name patterns

Cross walk

☒ No ☐ Yes

Target format

MARC21 Bibliographic

Status

Template

Use a Network Zone Template (cont.)

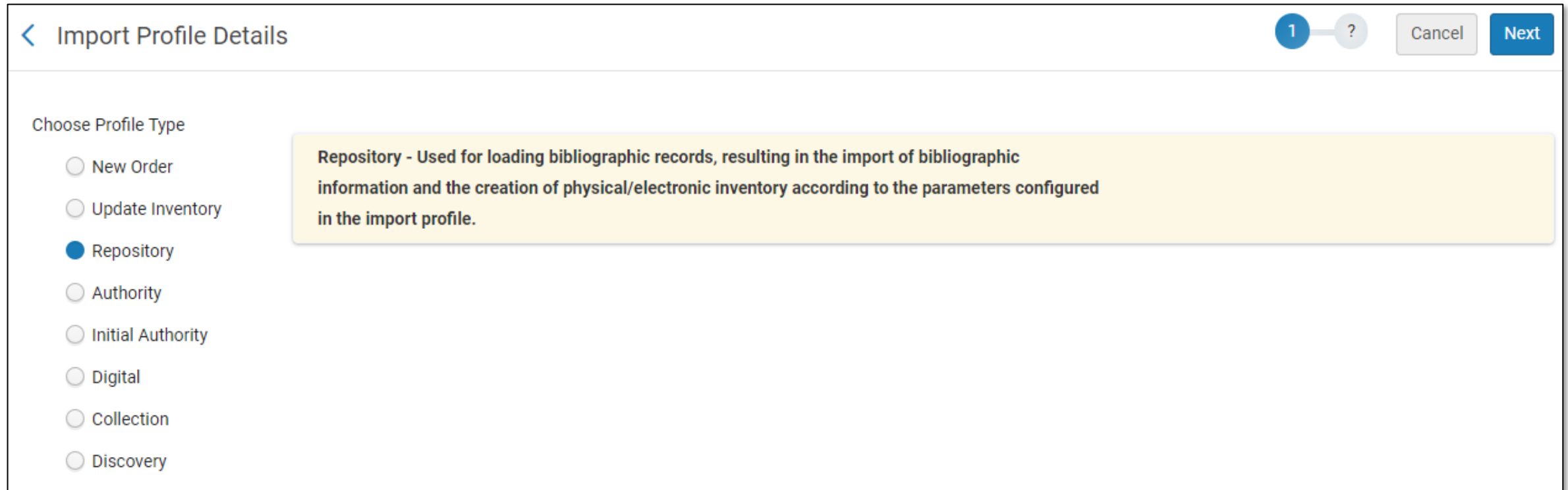
Members can view import profiles on the Network tab and copy them to run in their institution

The screenshot shows the 'Import Profiles' page with the 'Network' tab selected. The interface includes a search bar, a filter for 'Profile type : All', and a table of profiles. The table has columns for 'Profile name', 'Profile description', and 'Profile Type'. One profile is listed: 'Network Import Profile' with a description of '-' and a type of 'Repository'. A context menu is open over the profile, showing 'View' and 'Copy' options, with 'Copy' highlighted.

Profile name	Profile description	Profile Type
1 Network Import Profile	-	Repository

Add New Profile - Repository Type

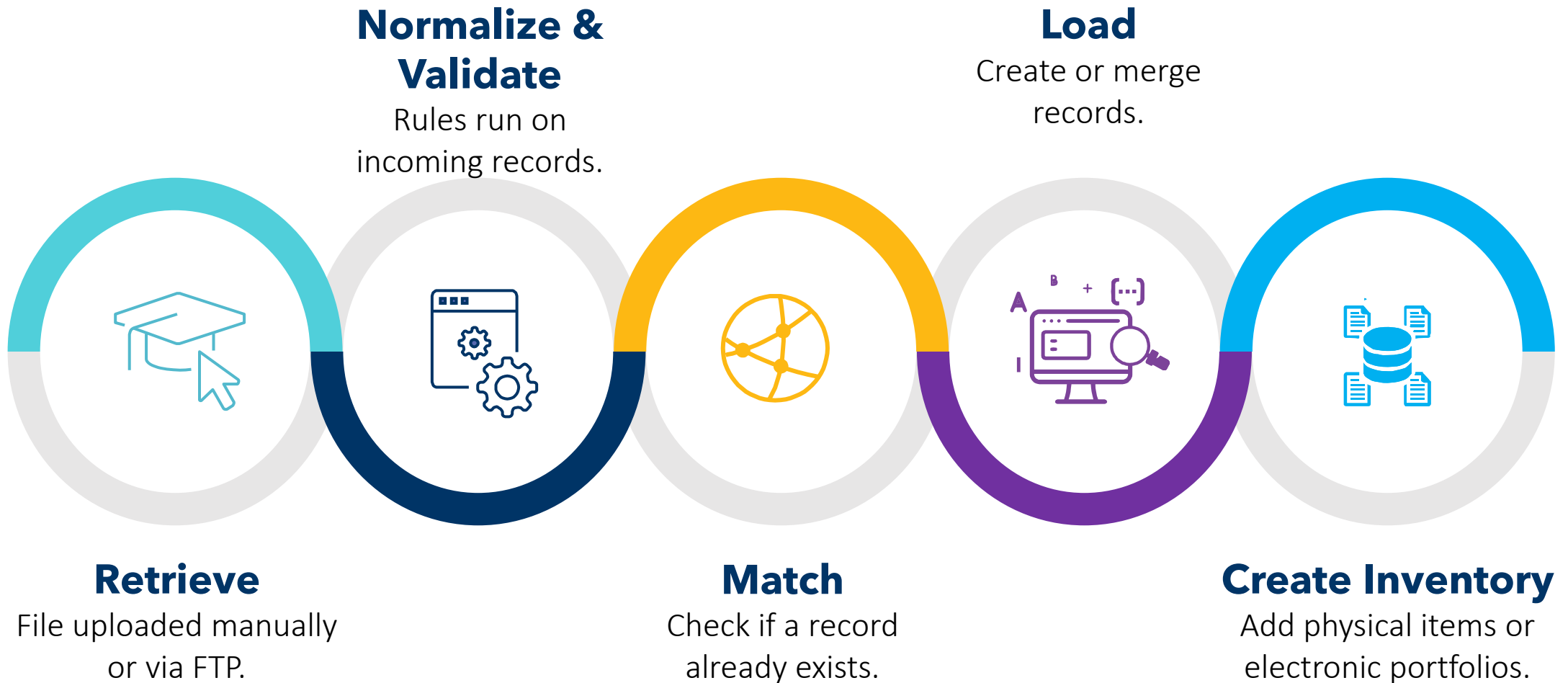
- Add New Profile > Choose Profile Type



The screenshot shows a dialog box titled 'Import Profile Details'. In the top right corner, there are two circular progress indicators, the first of which contains the number '1', followed by a 'Cancel' button and a 'Next' button. The main content area is titled 'Choose Profile Type' and lists several options with radio buttons: 'New Order', 'Update Inventory', 'Repository' (which is selected and has a blue dot), 'Authority', 'Initial Authority', 'Digital', 'Collection', and 'Discovery'. To the right of the 'Repository' option, there is a yellow callout box containing the text: 'Repository - Used for loading bibliographic records, resulting in the import of bibliographic information and the creation of physical/electronic inventory according to the parameters configured in the import profile.'



- We will focus on the **Repository** profile type

Workflow







Network Zone Records Handling

Filter


Filter out the data using  


Normalization

Correct the data for matching and cataloging using  


Change the data for PO line and inventory using  

Validation Exception Profile

Handle invalid data using 

☐ Skip records with validation issues 

Network Zone Records Handling

Import local extensions ☒ No ☐ Yes 

Location Mapping

Map a source value from the defined field/subfield in the imported record to a specific location in Alma

Location Mapping

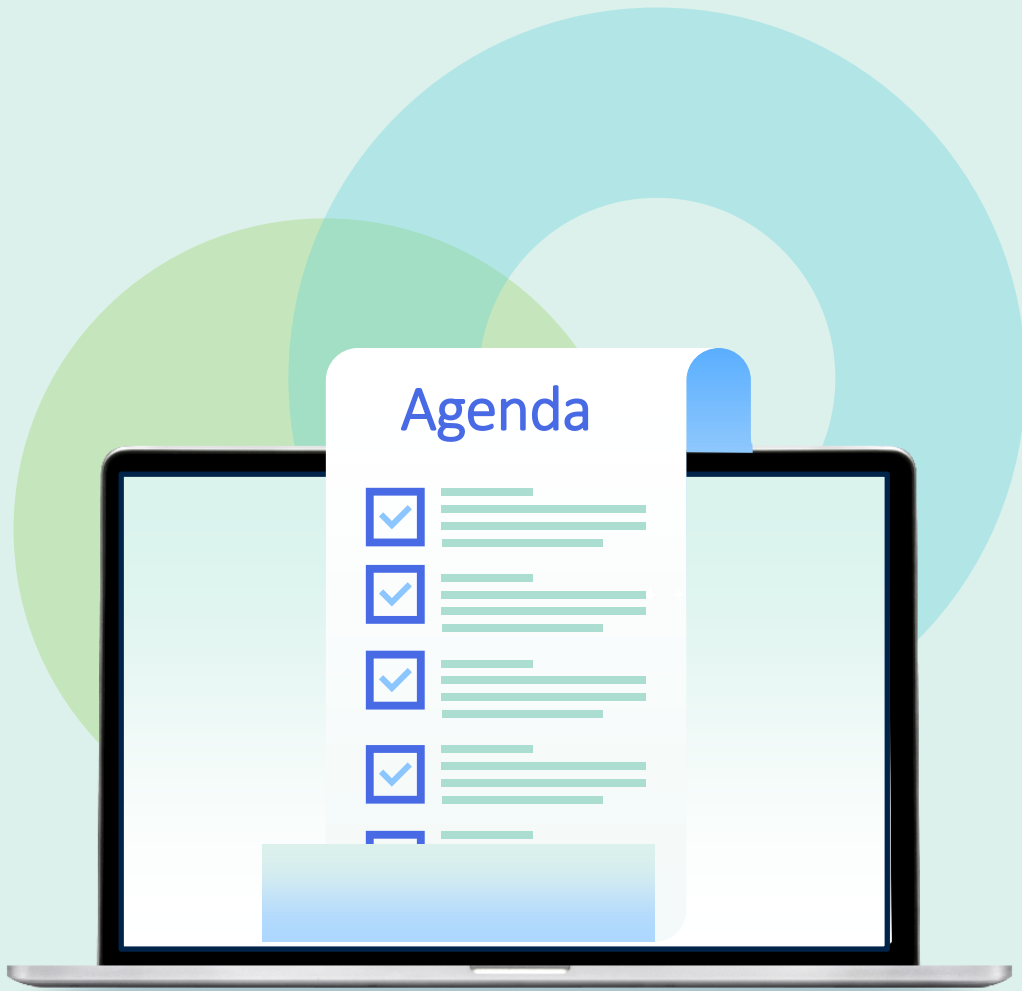
+ Add Location

	Source Value	Location
1	kids	Main Juvenile Education Collection (Main L

Source value

Location

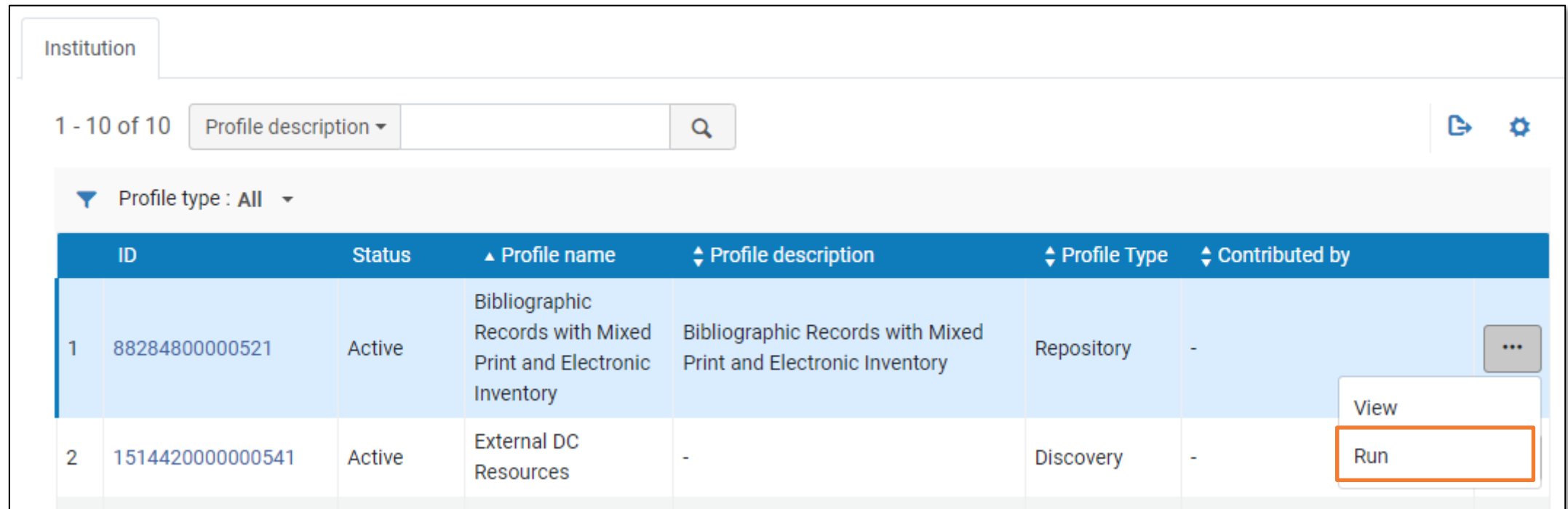
Add



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Running an Import Profile

- Resources > Import > Import
or
- Acquisitions > Import > Import



The screenshot shows the ExLibris interface with a table of import profiles. The table has columns for ID, Status, Profile name, Profile description, Profile Type, and Contributed by. The first profile is highlighted, and a context menu is open over it, showing 'View' and 'Run' options. The 'Run' option is highlighted with an orange border.

ID	Status	Profile name	Profile description	Profile Type	Contributed by
1	Active	Bibliographic Records with Mixed Print and Electronic Inventory	Bibliographic Records with Mixed Print and Electronic Inventory	Repository	-
2	Active	External DC Resources	-	Discovery	-

Running an Import Profile - Manual Upload

If Import Protocol is **Upload File/s**

<

Start New Import

Cancel

Submit

Files List

1 - 1 of 1

Select File

File Name	Label	Notes	Source	S
1. BIBLIOGRAPHIC_1547139...	-	-	-	4 KB

File *

Label

Notes

Add

Running an Import Profile - FTP

If Import Protocol is **FTP**

< Start New Import Cancel Submit

Import Profile Connection

FTP Connection Successful!

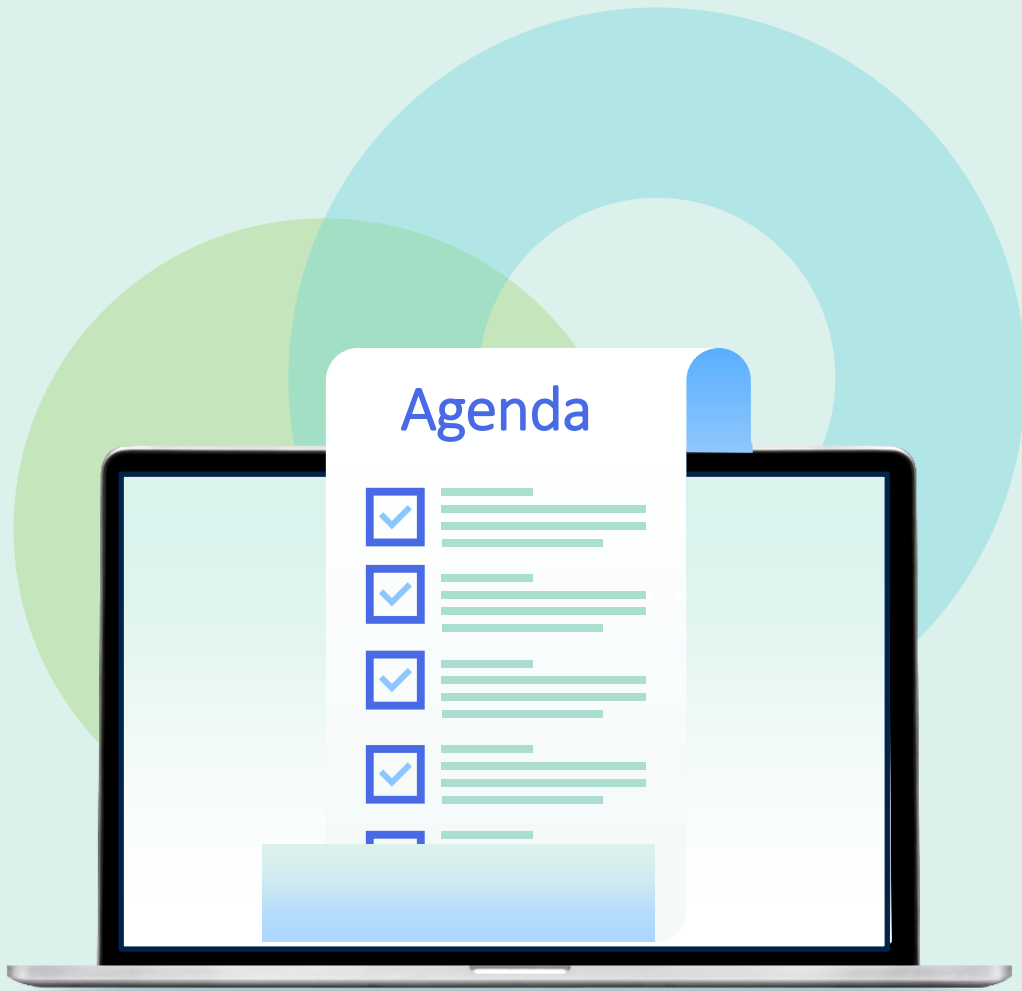
Server Port

Input directory

Files List

📄 ⚙️

File Name	Size	Date Created
1 BIBLIOGRAPHIC_15471396300005...	1 KB	Fri Apr 28 18:27:52 UTC 2023



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Monitor and View Import Jobs

- Resources > Import > Monitor and View Imports
or
- Acquisitions > Import > Monitor and View Imports

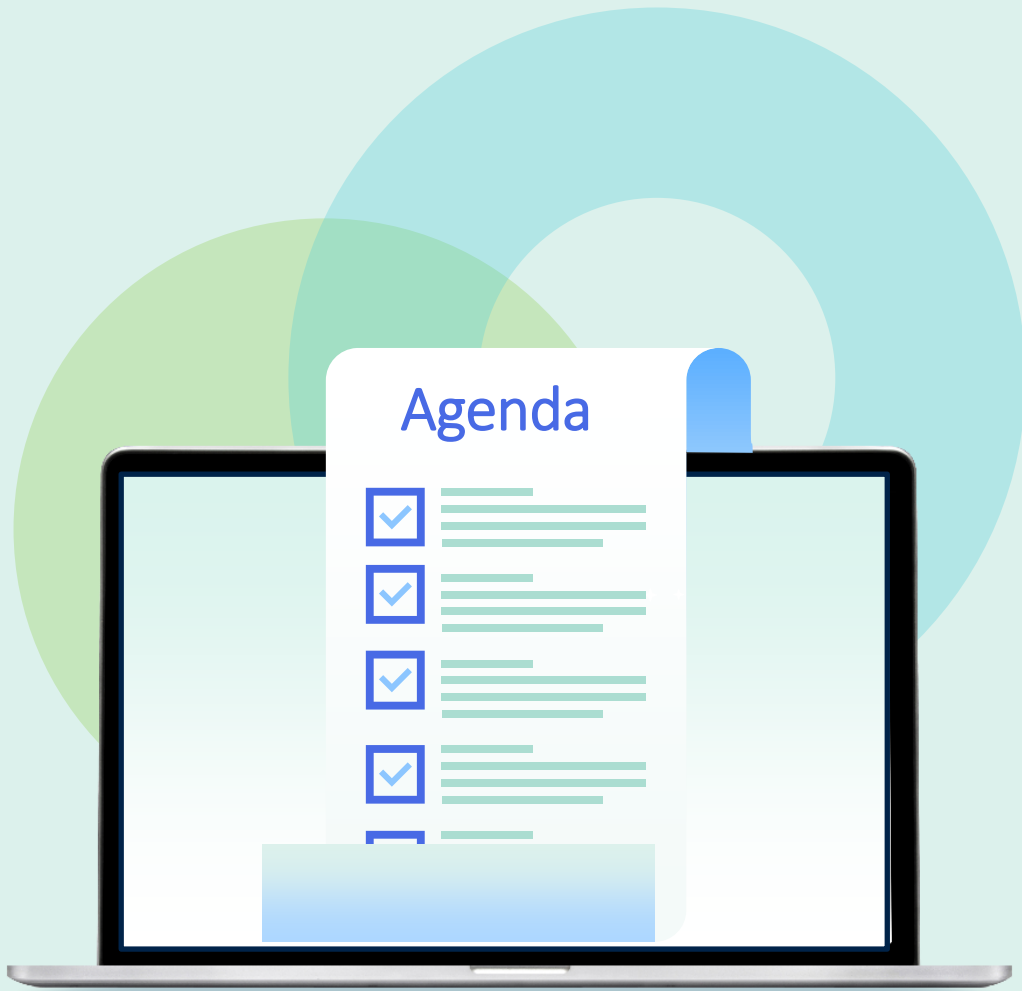
Monitor and View Imports

Run ImportBack

1 - 5 of 5All🔍Refresh📄⚙️

Filter : AllStatus filter : All

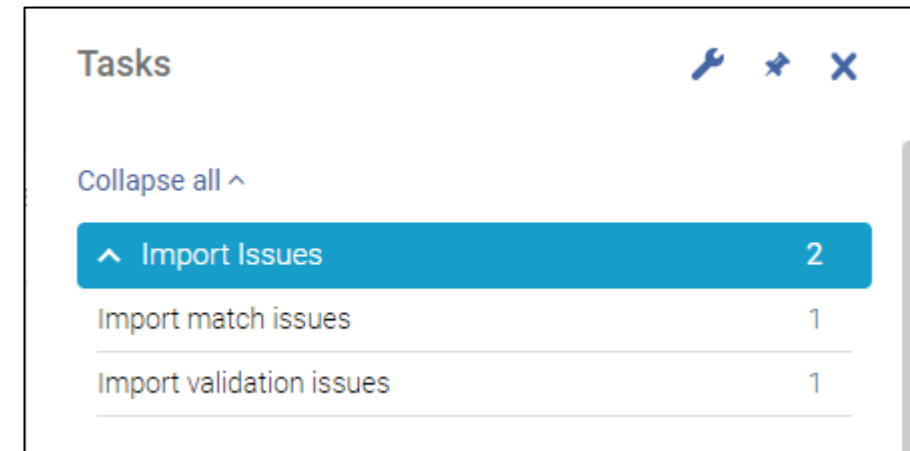
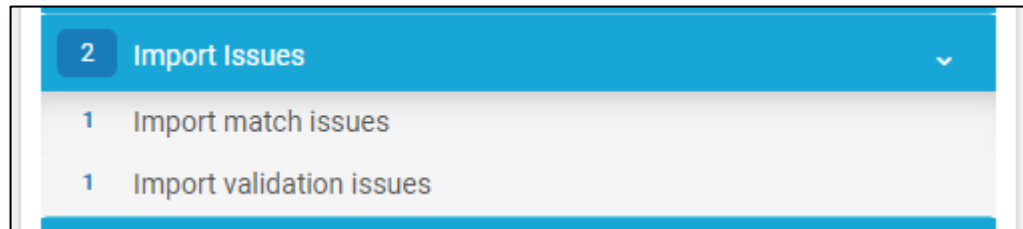
▼ Job ID	↕ Profile Name	↕ Profile Description	↕ Profile Type	↕ Status	↕ User	↕ Time Started	↕ Time Ended	Files Processed
1 154714949000...	Load Bib Records - Binary	Load Bib Records only	Repository	Manual Handling Required	rbella...	2023-04-28 12:07:10	-	0% <div>⋮<div></div></div> <div>⋮</div>
2 154714074000...	Load Bib Records - Binary	Load Bib Records only	Repository	Manual Handling Required	rbella...	2023-04-28 11:42:19	-	0% <div>⋮<div></div></div> <div>⋮</div>
3 154714037000...	Load Bib Records - Binary	Load Bib Records only	Repository	Completed Successfully	rbella...	2023-04-28 11:39:54	2023-04-28 11:39:59	100% <div>⋮<div></div></div> <div>⋮</div>



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Resolve Import Issues

- Resources > Import > Resolve Import Issues
or
- Acquisitions > Import > Resolve Import Issues
- Issues assigned to you are also accessible through the Tasks menu/widget



Types of Issues to Resolve

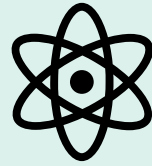
- Matching
 - Imported record matches to an existing record
- Validation
 - Validation issues that exist as an Error and not a Warning
- Errors
 - Other problems with file data



Further Resources

Documentation

- [Import Profiles](#)
- [Match Methods](#)
- [Resolving Import Issues](#)
- [Configuring Import Profiles for Primo VE](#)



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when you close the WebEx meeting