Record Import

In order to import multiple records in bulk into Alma, you can create import profiles that define:

- The source and structure of the import files that contain records you want to import
- How to map the imported records to existing records (if there are any existing records)
- How to process the imported records by merging with, overlaying, or duplicating existing records
- How to normalize the records to conform to Alma record requirements

With import profiles, you can import a variety of files containing shelf-ready, EOD (embedded order data), bibliographic, and authority data records, for example.

An Alma administrator configures import profiles for the various sources and file formats. An inventory manager then runs jobs to import records using these profiles, monitoring the jobs, viewing the results, and resolving any issues with the import.

See the links below that connect to the various sections that describe how to work with Alma's import capabilities. In these other sections, you learn how to configure and run import jobs and how to monitor their progress, resolve issues, and view job reports. To get started with configuring your import profiles, see Managing Import Profiles.

Alma provides the following additional features related to import profiles:

- **Uploading Embedded Order Data (EOD)** - You can simultaneously create PO lines and inventory for the imported records using embedded order data (EOD) files provided by vendors. EOD files include both the record and order information. An administrator configures import profiles for purchases using different funds or for different libraries. For more information, see Embedded Order Data (EOD) Field Mapping.

- **Uploading Shelf-Ready Material** - When the vendor provides resources that are already barcoded, you can simultaneously load bibliographic records, update/overlay existing inventory, and match the inventory to existing PO lines. This is also known as uploading shelf-ready material.

  For each record, Alma attempts to match either a PO line reference number received from the vendor or a vendor reference number (priority is given to the PO line reference number). The import of shelf-ready material addresses consistency between call numbers in Alma and the actual call numbers/spine labels of existing physical items, to ensure that items can be found in the stacks. When a new PO line is created, and a PO line and holdings record already exist, the existing holdings record is not changed: a new holdings record is created with the call number of the bibliographic record. For more information, see Configuring the Update Inventory Profile.

- **Uploading Digital Inventory** - You can upload both the bibliographic records related to digital inventory and the inventory itself.

- **Contributing Profiles to the Community Zone** - Administrators can contribute (share) import profiles for other institutions to copy and run. See Sharing Import Profiles in the Community Zone.

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**Note**

Alma provides links to record import in both the Acquisitions and Resource Management sections of Alma. These links lead to the same pages. However, when accessing import pages from the Acquisitions section, only acquisitions related profiles can be run and monitored; when accessing from the Resource Management section, only non-Acquisitions related profiles can be run and monitored. Administration is available from the Resource Management.
This section includes:

- Import Profile Types
- Managing Import Profiles
- Importing Records Using an Import Profile
- Monitor and View Import Jobs
- Resolving Import Issues
- Importing Records with CSV or Excel Files

For import information specific to remote digital repositories, see Managing Remote Digital Repositories.