**10/20/16: Import Profiles**

**Import Profiles (Importing bib, inventory & order records in Batch)**

Create the profiles you need – as many as you need – based on where you get the data.

Import profiles are configured under Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles

3 types of profiles:

* Repository = load bib and create physical/electronic inventory
  + Working through this one today
* New Order = load bibs with embedded order data to create PO Lines
* Update Inventory = update shelf ready material associated with PO Lines (users PO Line reference number/vendor reference number as match point)

**Live demo of creating Import Profiles, walking through all the options**

* Choose profile type (each choice has an explanation of what it does)
* Details
  + NOTE: make sure name/description clearly identifies what profile imports
  + Originating system (note all options ; can add more in Resource Management Config)
  + File name patterns: can use to filter out records / files. For example, if using FTP, the directory may contain files that are not to be imported (e.g. information files)
  + Choose FTP briefly to display FTP specific options
    - Scheduling
    - FTP server info
  + Choose OAI to display OAI harvesting options
* Normalization & Validation
  + Filter = Indication rules that you create (Metadata Editor → Rules → Indication Rules)
    - Imported records that match the logic of the created indication rule aren’t imported as part of the process
    - More info about indication rules: <http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/020Using_the_Repository_Search/030Managing_Search_Queries_and_Sets#Working_with_Indication_Rules>
  + Norm rules = rules applied to enhance bib (add, remove, change fields in bib)
    - Don’t forget – this is an import profile that will be working with the NZ, so only NZ norm rules & processes can be selected here.
  + Validation = checks your data
    - MarcXML Bib Import validation exception profile is recommended by ExL
* Matching
  + Match profile/method = what to use to match with existing records
    - Can use System Identifier prefix for the 035 method, but not required
    - More info here: <http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/060Record_Import/020Managing_Import_Profiles#Match_Methods_.E2.80.93_Explanations_and_Examples>
  + Match Actions = how to handle upon match, merge method, how to handle no match
    - Upon match options:
      * Merge – Merge the records according to the options chosen in the profile configuration. The history of all linking performed for this record (for example, attached PO lines) is retained.
      * Overlay – Discard all bibliographic data in the old record and replace with the data in the new record. Like merge, the history of all linking performed for this record is retained.
      * Use NZ record – select this one, preserves the NZ record during import. Good choice when loading brief bibs from vendor.
  + Merge method = merge rules
    - Don’t forget – this is an import profile working with the NZ, so only NZ merge rules can be selected here.
    - Do not override:
      * Prevent older bibliographic records from overlaying or merging with newer records. This enables uploading records in the correct sequence by preventing the update of an existing record with an older version of the same record. This feature is enabled by the metadata record field Originating System Version, which is created from the record’s 005 control field the first time the record is imported
  + Multi-match handling
    - Unresolved records = Select to not import multiple matches. Instead of multiple matches being sent to the Matching section of the Resolve Import Issues page, they are added to a report (Download records that were skipped due to multi-match automatic handling).
* Set management tags – suppression and synch w/OCLC
* Inventory – fields differ upon choice – tells were to find item information
  + Show how the options change for electronic / physical / mixed
  + Resource type displays only for mixed, allows you to tell Alma the field that indicates if the record is P or E
  + Show difference between Basic and Advanced Physical mapping
  + Update holdings call number = Whether to enable the update of a holdings record with the call number that is part of an imported bibliographic record.
  + Use 964 $L for location and $I for barcode
* If we were creating an import profile of New Order type, there would be an additional tab that would give a place to enter EOD (embedded order data) info – additional PO line reference, vendor reference number, vendor title number field can be used as match point – other fields tell where to find order information

**Live demo of running Import into NZ using file of records from CalState institution**

Run Import - Done from either:

* Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles
* Resource Management > Import > Import
* Choose profile to use > Actions > Run Import
  + Import file of records

**Monitor imports**

* Resource management > Import > Monitor and View Imports
  + Page automatically appears when you run the import
  + “…” = files loaded ; click on this to show
* Report = info about job, start/finish time, results of import – doesn’t show if there are errors or if manual processing of records is required
  + Allows you to look at full details of imported records
  + Expand one of the headers to show available actions
* View file details = info about the file name, # of records, size – permits download of copy
* Events = stages of process – assists in troubleshooting failed imports
* Imported records = permits creation of a set of the imported records – doesn’t appear if there are errors or if manual processing is required
* Manual handling required appears as a clickable link if there are issues with the file that need resolution

**Resolving Import Issues**

* 3 types
  + Matching
    - These errors occur when Alma cannot automatically resolve a match according to the match method and merge rules defined in the profile. Usually, this is due to a multi-match
  + Validation
    - Checks the records according to the validation profile selected. If the check determines that an issue exists as an Error and not as a Warning, the file is sent to the Validation subpage of the Resolve Import Issues page.
  + Errors – such as invalid xml record
* Contains records rejected for above reasons which must be handled manually
* Detailed information on resolving these issues in the Resolving Import Issues page linked below.

**Things to be aware of with a Network Zone:**

* Import profiles that use the NZ will not be able to use any IZ merge or normalization rules. You’ll need to create a merge and normalization rule processes in the NZ for everyone to share with their Import Profiles. This will also help to create standardization with your NZ bib records.

**Helpful links:**

<http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/060Record_Import>

<http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/060Record_Import/00_Import_Profile_Types>

<http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/060Record_Import/020Managing_Import_Profiles>

<http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/060Record_Import/050Importing_Records_Using_an_Import_Profile>

<http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/060Record_Import/070Resolving_Import_Issues>

**Chat transcript**

from North American Professional Services to Everyone:

Welcome! Please mute your audio as you join unless you have a question to ask right away. We'll get going in about 5 minutes.

from Alice Kawakami-CSU to Everyone:

yep

from North American Professional Services to Everyone:

A/V check - everyone hearing audio and seeing Megan's screen?

from AL - CPP to Everyone:

Yes

from TeamSDSU to Everyone:

Yes

from A Hor (privately):

yes

from North American Professional Services to Everyone:

Thank you Sac State!

from North American Professional Services to Everyone:

And thank you Chico!

from SJSU TS (privately):

can y

from SJSU TS (privately):

can megan make her screen larger, please

to SJSU TS (privately):

Hi SJSU - she's already at a pretty large resolution; it's going to be tricky to see the options if she does. You may want to use the + and - buttons in the top right of the presentation window to zoom in / out.

from SJSU TS (privately):

ok, thanks

from Northridge 2 to Everyone:

thank you

from Sacramento State to Everyone:

In the previous page, physical source format was set to XML. Should it be binary for MARC?

from North American Professional Services to Everyone:

Hi Sac State - it depends on the file. If it's a binary MARC file, then yes; you can also load a MARC XML file.

from Sacramento State to Everyone:

thank you

from Mitch Turitz (SFSU) (privately):

What if you have an 035 that is really outdated and is what the OCLC master record is 019?

to Megan Drake (privately):

from Mitch Turitz (SFSU) (privately):

What if you have an 035 that is really outdated and is what the OCLC master record is 019?

from yvonne (CPP) (privately):

how do you delete a NZ record if you import a record in error?

from Carole to Everyone:

Can we see that question in the group chat?

from North American Professional Services to Everyone:

from Mitch Turitz (SFSU) (privately):What if you have an 035 that is really outdated and is what the OCLC master record is 019?

from yvonne (CPP) (privately):

how do you delete a NZ record if you import a record in error?

from Carole to Everyone:

Thanks.

from yvonne (CPP) (privately):

OK and thanks!

from Mark B. (Los Angeles) to Everyone:

Match on 035 -- I had the idea that 019 goes into a 035 |z, yes? If so, would that be used by Ex Libris?

from Mark B. (Los Angeles) to Everyone:

(used by Alma to match)

from Mark B. (Los Angeles) to Everyone:

yes, sorry--touch on that later...

from Mitch Turitz (SFSU) to Everyone:

from Mitch Turitz (SFSU) (privately):

What if you have an 035 that is really outdated and is what the OCLC master record is 019?

from Mark B. (Los Angeles) to Everyone:

Thank you.

from North American Professional Services to Everyone:

https://knowledge.exlibrisgroup.com/Alma/Product\_Documentation/Alma\_Online\_Help\_(English)/Resource\_Management/060Record\_Import/020Managing\_Import\_Profiles#Creating.2FEditing\_an\_Import\_Profile:\_Match\_Profile

from Mark B. (Los Angeles) to Everyone:

Many thanks, lots to study.

from Mitch Turitz (SFSU) to Everyone:

which field for the P or e?

from Steve to Everyone:

So to add the p or e in whatever field, we would have to edit the file before importing to Alma, such as by using MarcEdit?

from North American Professional Services to Everyone:

Hi Mitch & Steve: you would either pre-process like Steve suggests or ask the provider of your MARC file to put "P" or "E" in a particular field/subfield for you.

from Steve to Everyone:

Thanks

from Sacramento State to Everyone:

Is it a requirement that the location codes in the 964$l exist in the institution?

from Sacramento State to Everyone:

Asking because you're using Chico's instance

from Sacramento State to Everyone:

cool

from maritime (privately):

How long / how many import jobs are retained in ALMA?

to maritime (privately):

There's no time limit or limit of numbers of jobs.

from North American Professional Services to Everyone:

from maritime:

How long / how many import jobs are retained in ALMA?

to maritime:

There's no time limit or limit of numbers of jobs.

from yvonne (CPP) (privately):

why out of 26 physical records only 19 processed?

to yvonne (CPP) (privately):

Keep watching - she's getting to it.

from yvonne (CPP) (privately):

Great and thanks, because of matching profile

from Mitch Turitz (SFSU) to Everyone:

Example of electronic record? Or mixed media?

from North American Professional Services to Everyone:

Hi Mitch - the sample file didn't include them. We could work with you outside the call on importing E or mixed files.

from Laurie Welling (privately):

We will be importing electronic records next week during the PDA demo. However, we won't be focusing too much on import profiles since they were covered today.

from Northridge 2 to Everyone:

In these functional calls do you want questions sent to Everyone or North American services group?

from Cal Poly SLO to Everyone:

Why wasn't there error message when locations didn't find a match?

from Northridge 2 to Everyone:

thank you

from Mark B. (Los Angeles) to Everyone:

So "unavailable" is a general (broader) signal of a problem, requiring (as you mentioned) specific study of the MMS specified...

from Mark B. (Los Angeles) to Everyone:

Thank you.

from Cal Poly SLO to Everyone:

thanks

from Mitch Turitz (SFSU) to Everyone:

Suggestion, in future examples, include mixed media examples.

from Northridge 2 to Everyone:

the import profile task force has draft polices on confluence will post link

from Northridge 2 to Everyone:

https://calstate.atlassian.net/wiki/pages/viewpage.action?pageId=48005183

from Northridge 2 to Everyone:

thank you!

from Mark B. (Los Angeles) to Everyone:

Many thanks Megan and Dolph, very fun and exciting and helpful.

from Samuel (privately):

Thank you!

from Sacramento State to Everyone:

Thank you!

from Janee Mason (HSU) (privately):

thank you

from Chris CPS to Everyone:

Thank you!