

About Import Profiles

Import Profiles are equivalent to Millennium Load Tables

Import profiles:

- Are used to import batches of records
- Can normalize incoming records
- Can find matching records in existing repository
- Can also apply management tags (e.g., to suppress from discovery)
- Can create inventory records (e.g., item /holdings) as well as electronic inventory records (portfolios) - import profiles cannot create a new package, but can add portfolios to an existing package
- Must be in MARC21 Binary or MARCXML
- Can be configured to load records automatically from an FTP server or on demand
- Requires Catalog Administrator role

Creating Import Profiles

Resource Configuration menu > Record Import > Create New

Three types of import profile:

- Repository: Creates bibliographic and item / portfolio records
- New Order: Creates bibliographic and inventory records as well as PO Lines
- Update Inventory: Updates inventory based on existing PO Lines

Import Profile Configuration

- Originating System: select from WorldCat, Library of Congress, or Other; doesn't affect the import profile, it simply helps Alma identify matches from the same source
- Physical Format: e.g., MARC21
- Load File Source: Upload (manual, such as from desktop) OR FTP to retrieve records from a server
 - If using FTP, additional information is required:
 - New - select only new files that Alma hasn't imported yet, or all available on the FTP server
 - Scheduler - automate retrieval, e.g., every 5 hours
 - File name pattern: identify only those files that you want to load into your system, e.g., only load XML files = *.xml
 - Crosswalk: Currently not in use
 - Target format - only MARC21 Bibliographic
- Active / inactive - must be active to run with scheduler

- Normalization: Choose the normalization rule, including a custom normalization rule
- Validation Exception Profile: Choose a validation exception profile, including any possible customized exception profiles (see Handout: Network-managed records in a Network Zone for the Working with Validation Exception Profiles in the Network section)
- Match: Choose match method to determine how matches will be identified (select from out-of-the box methods)
 - Match actions: Upon match, either:
 - Import
 - Not import (reject)
 - Use the incoming record to overlay existing records
 - Merge (then must choose Merge method)
- Merge: Choose merge method to identify method used by Alma to merge incoming records with found matches. Will only apply if a single record is found - if multiple matches are found, the merge will fail due to multi match (Alma doesn't know which record to merge with).
 - **Deletes** can be handled via import profiles in the incoming records loaded have a "d" in the LDR field 05 position. Deletes are processed only if the matching record to be deleted has no inventory (no item records or portfolios).
 - For **PDA portfolios**, if the bib record is associated with PDA, the record will only be deleted if the PDA ID is the same as the PDA profile
- Unlink records from the community zone: In the event that a match is found, and the record in the repository is linked to the community zone, selecting this parameter will de-link the record from the community zone. The record will then be treated as a local record
- Handling: Choose to handle matches manually (view report) OR handle matches automatically - then choose to merge or overlay
- Disregard matches for CZ linked records - set this if you do NOT want incoming records to be linked to the CZ
- Skip and do not import: Any records that match existing records will be skipped; will be included in a report of the import job but there will be no manual handling flagged
- If no match:
 - Import (create new records)
 - Do not Import (skip) - use when updating brief records
- Management tags: for records handled in the import profile, can choose:
 - Suppress from discovery
 - Synchronize with OCLC
- Inventory operations: select what type of inventory will be created. Each option below (except for None) opens a new field to enable mapping of data from incoming file to inventory data
 - Electronic (portfolios will be created)
 - Portfolio type:
 - Standalone - not part of a database package
 - Part of a package - part of a database package

- Allows you to link to an existing package already cataloged (e.g., XYZ Journals Collection)
- Single portfolio / multiple portfolios becomes relevant; can indicate whether a single portfolio or multiple portfolios will be created for each incoming record (e.g., if each incoming record has multiple links to resources)
 - Enable proxy: (e.g., prepend libproxy.csun.edu/login?url= to each URL contained in incoming electronic records)
 - Extract access URL from field: indicate which MARC field / subfield contains the URL to the resource
 - Indicate which 856 fields can be skipped based on indicators (e.g., 42)
 - Activate resource: indicate whether you want to the resources to become active upon load; alternatively, you can activate them later
- Physical (holdings and items will be created)
 - Complete Physical Inventory mapping to create item records
 - Map library and location checkbox to map incoming location codes that correspond to the library and location codes in Alma
 - To create multiple items, see Nov 2013 release notes <http://bit.ly/almanov13> pg. 61
- Mixed (mix of electronic and physical) - each incoming record must indicate whether it is electronic and physical in a MARC field. Any MARC field / subfield may be chosen; however the content of the indicated subfield must be either:
 - P=physical
 - E=electronic
- None (only bib data will be affected by the import)
- Mapping tab
 - Referred to when we've selected the "map library and location" parameter when creating physical inventory. Mapping tab allows us to input the relationship between the library and location information in the record and how it should pertain to the library and location in Alma

Import Profiles for Acquisitions

New Order Import Profile

- Used for EOD (embedded order data)
- Creates PO Lines, Bib & Inventory
- 3 differences between repository import profile and the new order import profile
 - No option NOT to create inventory; in order to create PO line for that inventory
 - PO Line information tab

- Informs which incoming MARC fields will be used to generate PO Lines
 - See <http://bit.ly/POlinetypes> for more information about **PO Line Types**
 - **Decimal point location** determines how many locations to the left of the price in the input file Alma should place the decimal point (e.g., 1000 = 10.00, enter 2)
 - See <http://bit.ly/acqmethods> for more information about Acquisition Methods and their implications
- EOD Mapping contains fields which will be mapped in the input file per record
 - Alma will automatically generate a PO Line number; POLine field = additional PO Line Reference number
 - Vendor reference number can be used a possible match point in the update inventory profile
 - Map funds - used when vendor uses a code that corresponds to, but doesn't match exactly the library's fund codes
 - Interested users - must be the user's primary identifier
 - Vendor invoice number field / subfield
 - Rush data must be in a specific format, e.g, TRUE
 - Do not create electronic activation task - select if you do not want an activation task to be created automatically

Update Inventory

- Import shelf-ready files
- Update inventory for records for which a PO-line already exists in Alma
- Typically scenario: We previously loaded an EOD file; the material has been delivered and we want to load a new file to update the bib in case it was a brief record and update inventory to add barcode or URL
- Will not create new records; only updates
- Bib records can be completely overlaid by or merged with the incoming bibs; physical inventory can update call number, barcode etc.; electronic inventory can be updated with a URL
- Key differences of the Update Inventory profile
 - Match method is pre-selected and not configurable; match method will always look for a match based on the PO Line
 - Match is based on PO Line #, vendor reference number, vendor, and vendor account #
 - Upon match option: includes only overlay and merge as options. No option to import or not; no upon no match option
 - So set management tags tag - will remove any tags that have been set, assuming the records are now complete and ready for publishing and sync
 - You can choose to update the call number in the existing holdings record with the call number in the incoming bib

- You can choose to mark the physical item as received
- Fund information is not updated by the update inventory profile