Alma Insights

An Introduction to Alma Import Profiles

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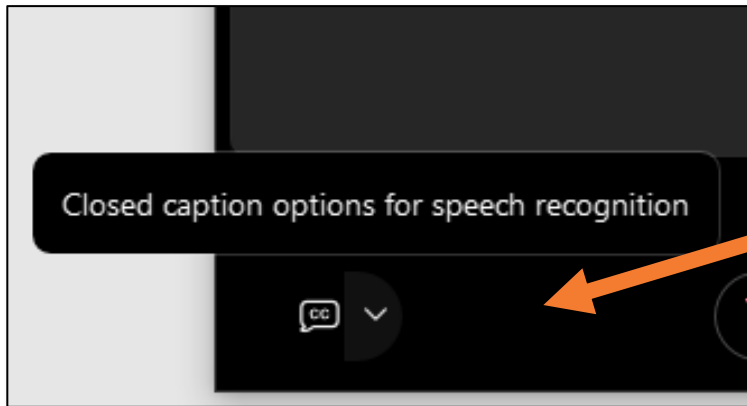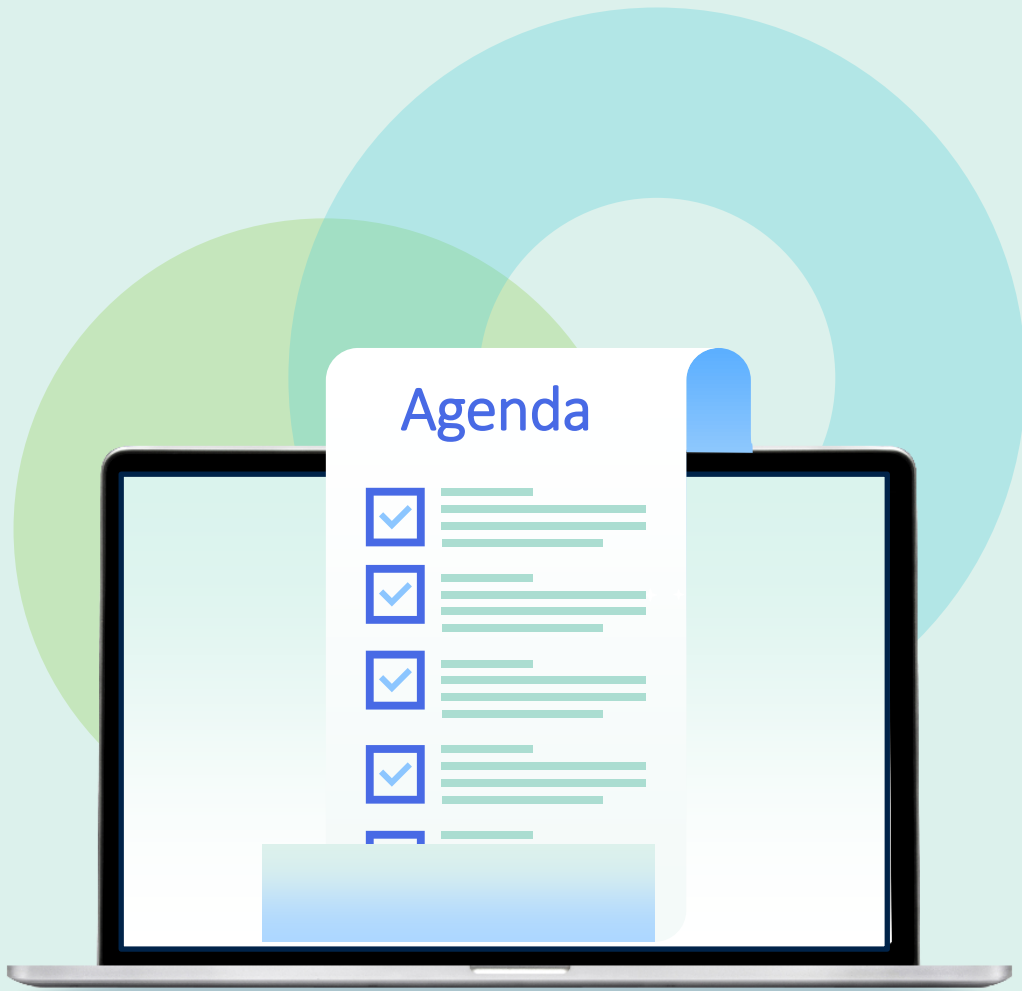Part of **Clarivate**

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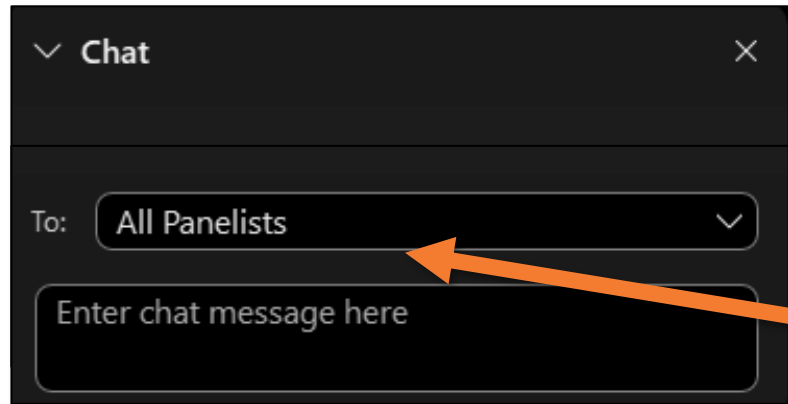
- Technical issues? Exit and rejoin the WebEx session
- Submit questions via WebEx Chat: Select **All Panelists** in the **To:** dropdown menu
- Turn captions on and off in the lower-left corner of the WebEx screen
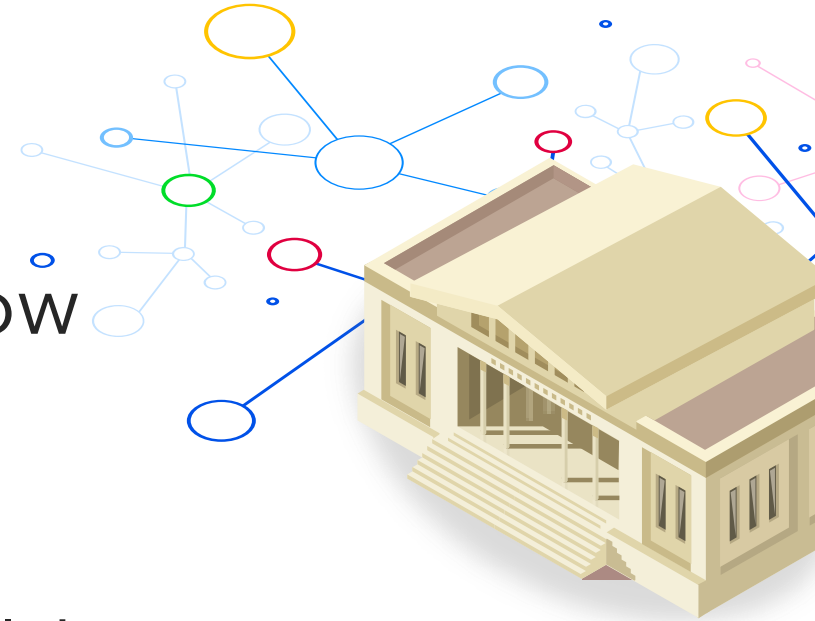
- Introduction

- Import Profile Types

- Creating an Import Profile

- Running an Import Profile

- Monitor and View Import Jobs
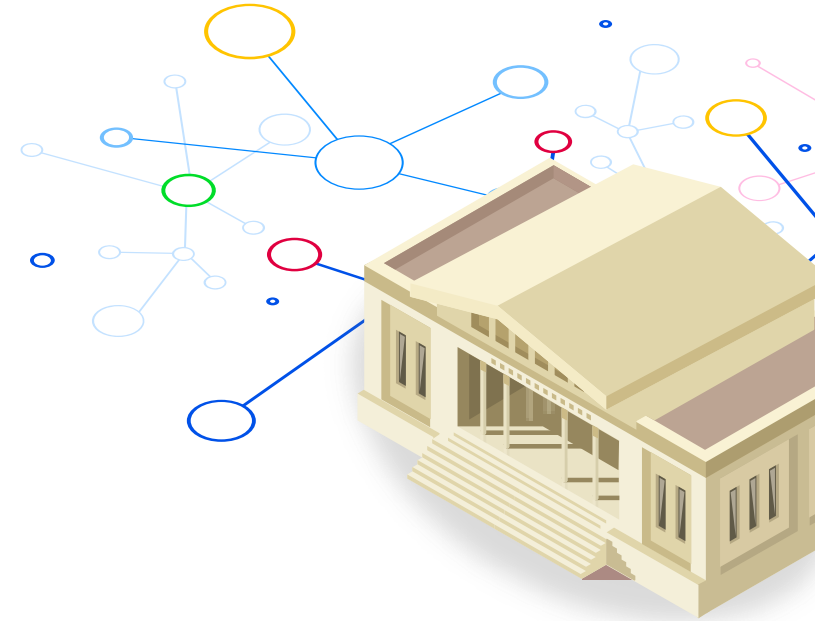
- Resolve Import Issues
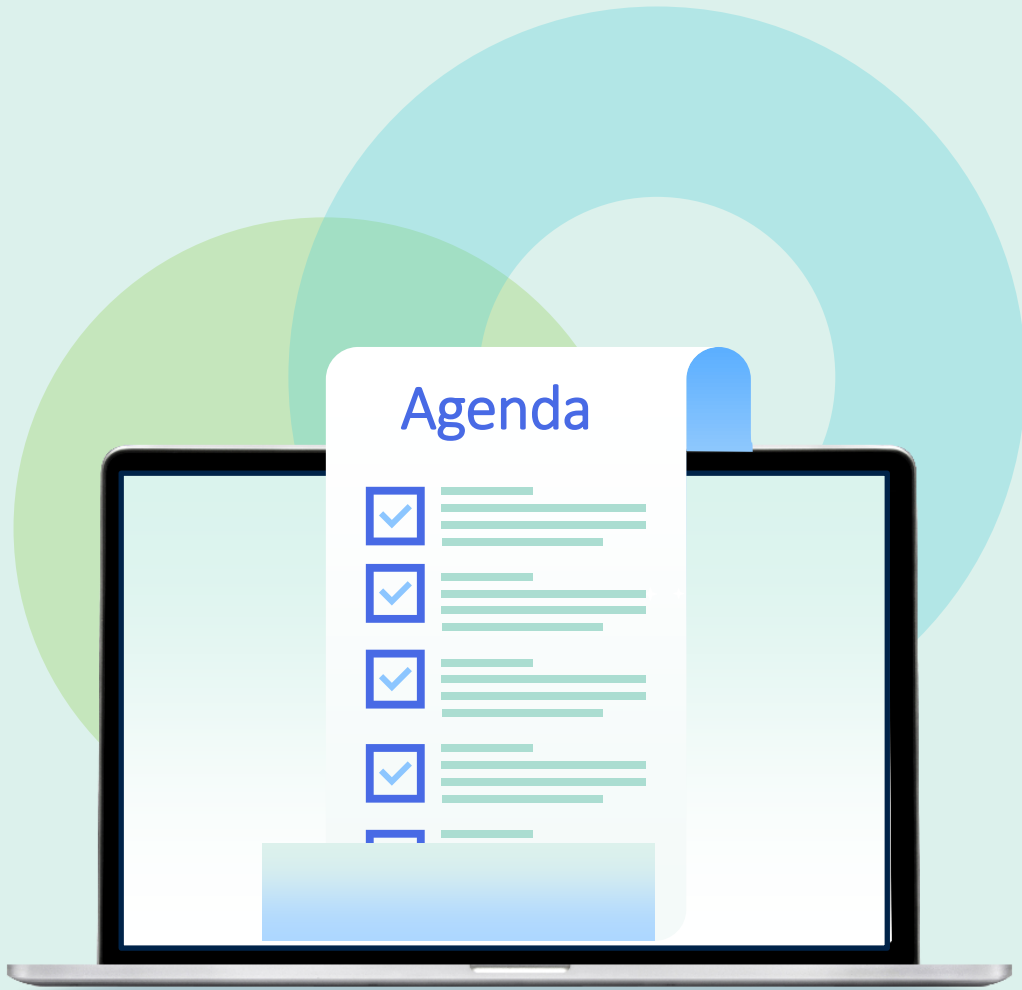
What is an import profile?

- 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

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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
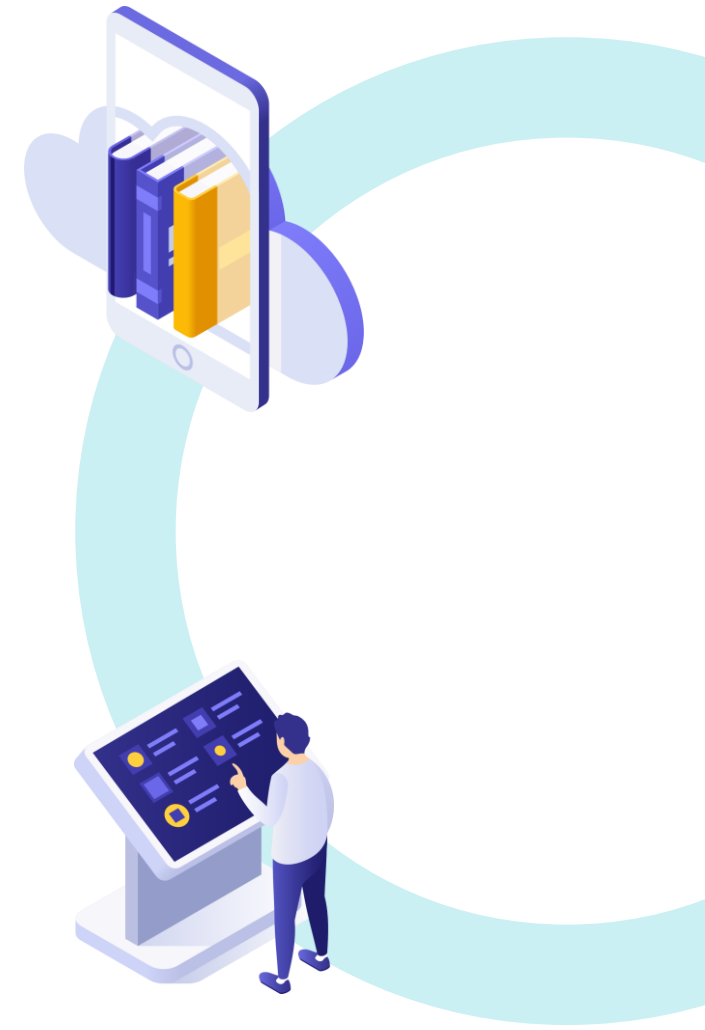
Repository Imports

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

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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
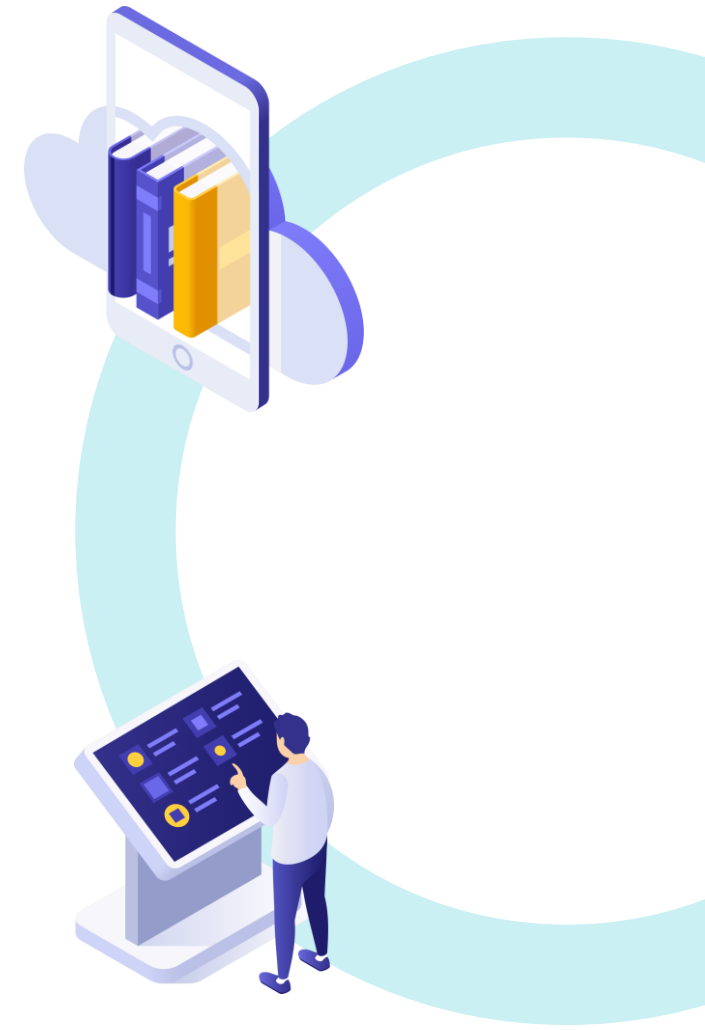
Digital Imports

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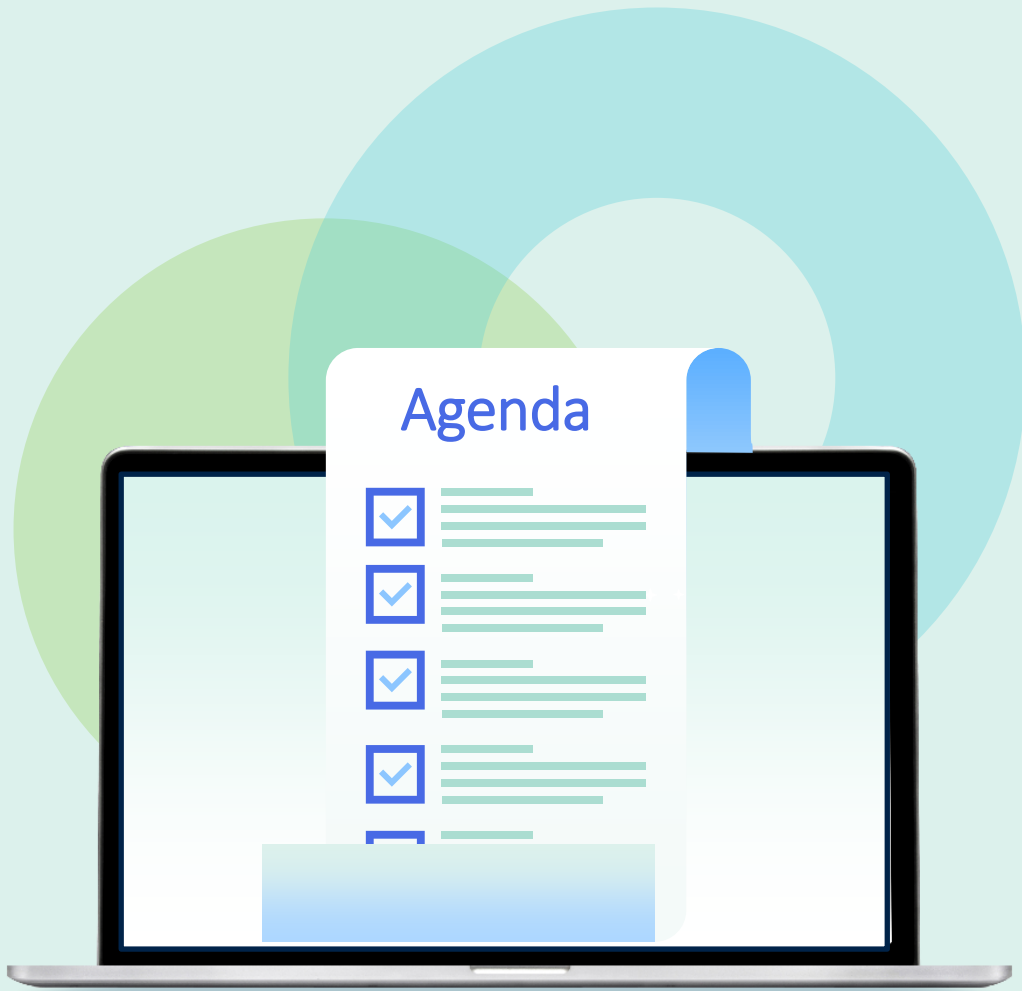   - Remote – import records for resources stored in a remote digital repository

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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
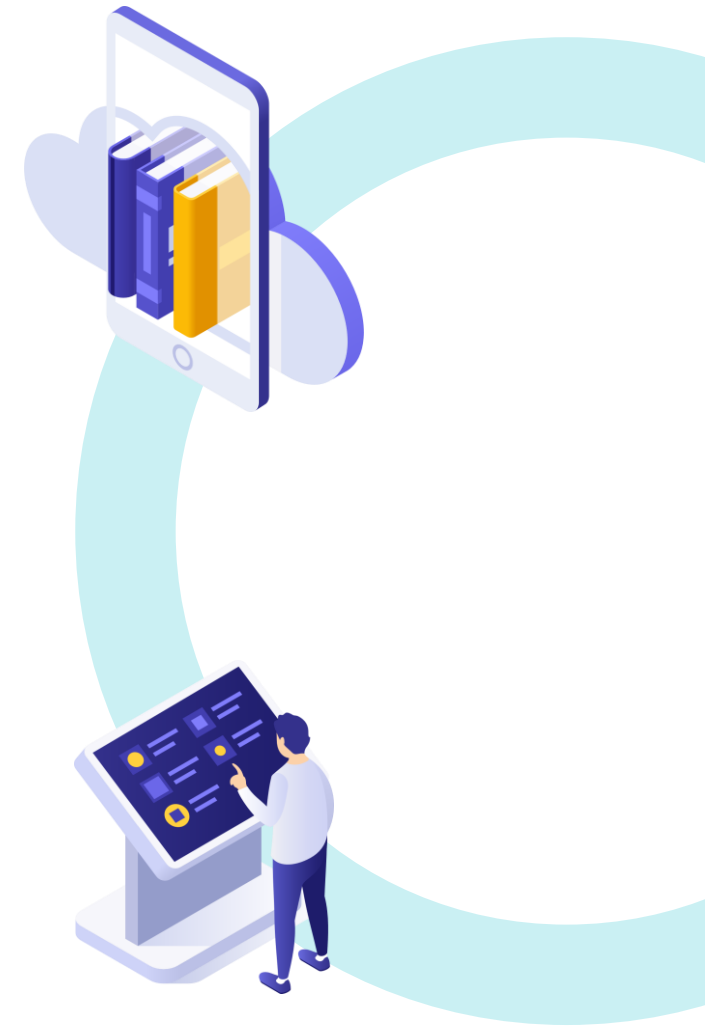
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Roles

- 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

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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

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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
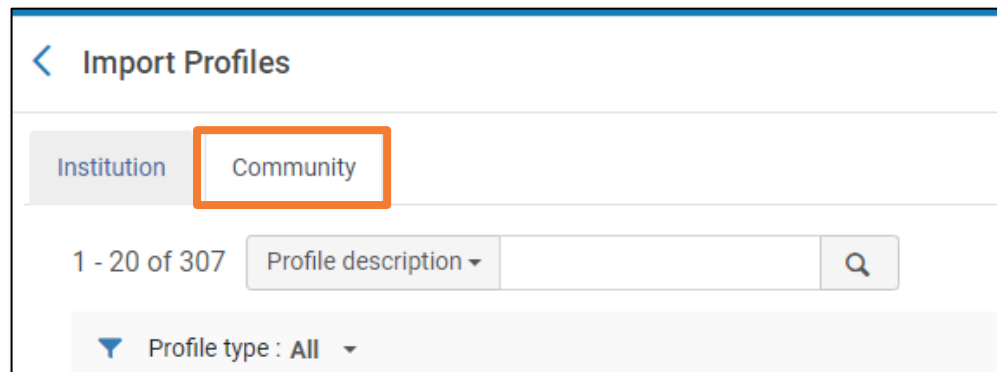
Use a Network Zone Template

Network can define an import profile as a Template

Use a Network Zone Template (cont.)
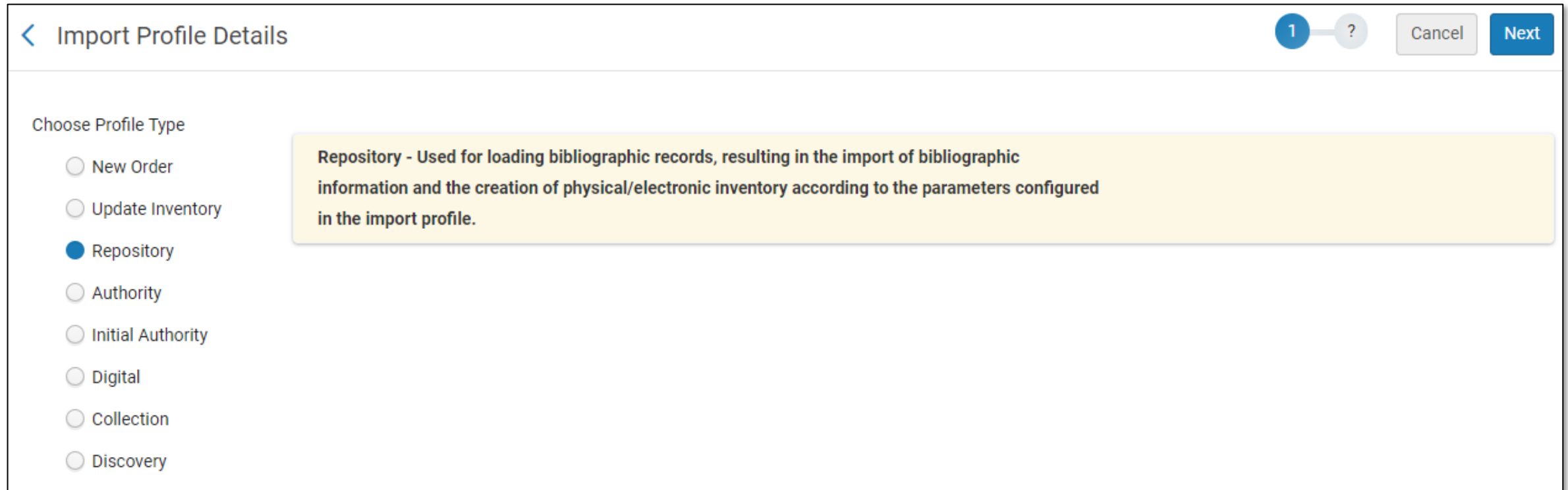
Members can view import profiles on the Network tab and copy them to run in their institution

Add New Profile – Repository Type

- Add New Profile > Choose Profile Type

< Import Profile Details   ①—?   Cancel   Next

Choose Profile Type

○ New Order
○ Update Inventory   Repository - Used for loading bibliographic records, resulting in the import of bibliographic
● Repository   information and the creation of physical/electronic inventory according to the parameters configured
○ Authority   in the import profile.
○ Initial Authority
○ Digital
○ Collection
○ Discovery

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

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Workflow

Normalize & Validate
Rules run on incoming records.

Load
Create or merge records.

Retrieve
File uploaded manually or via FTP.

Match
Check if a record already exists.

Create Inventory
Add physical items or electronic portfolios.
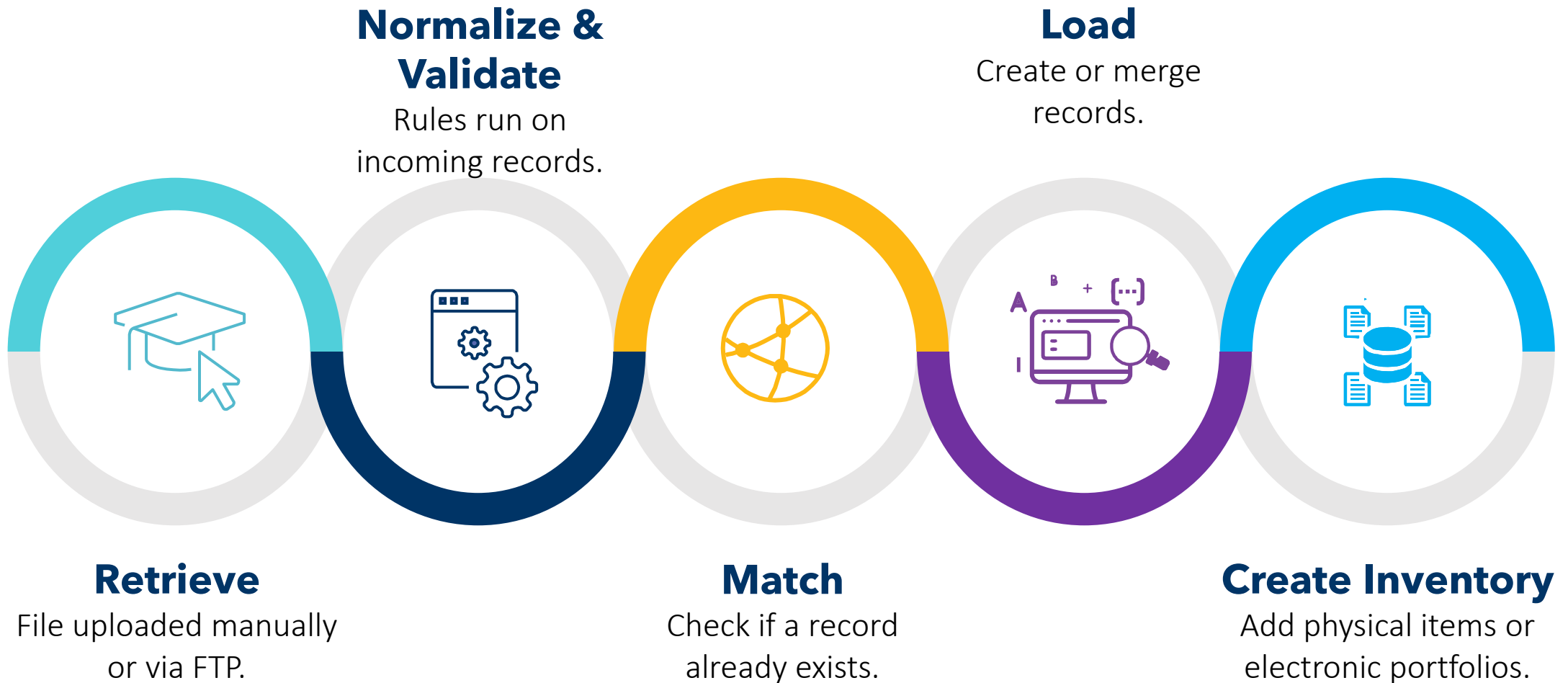
Network Zone Records Handling

Location Mapping

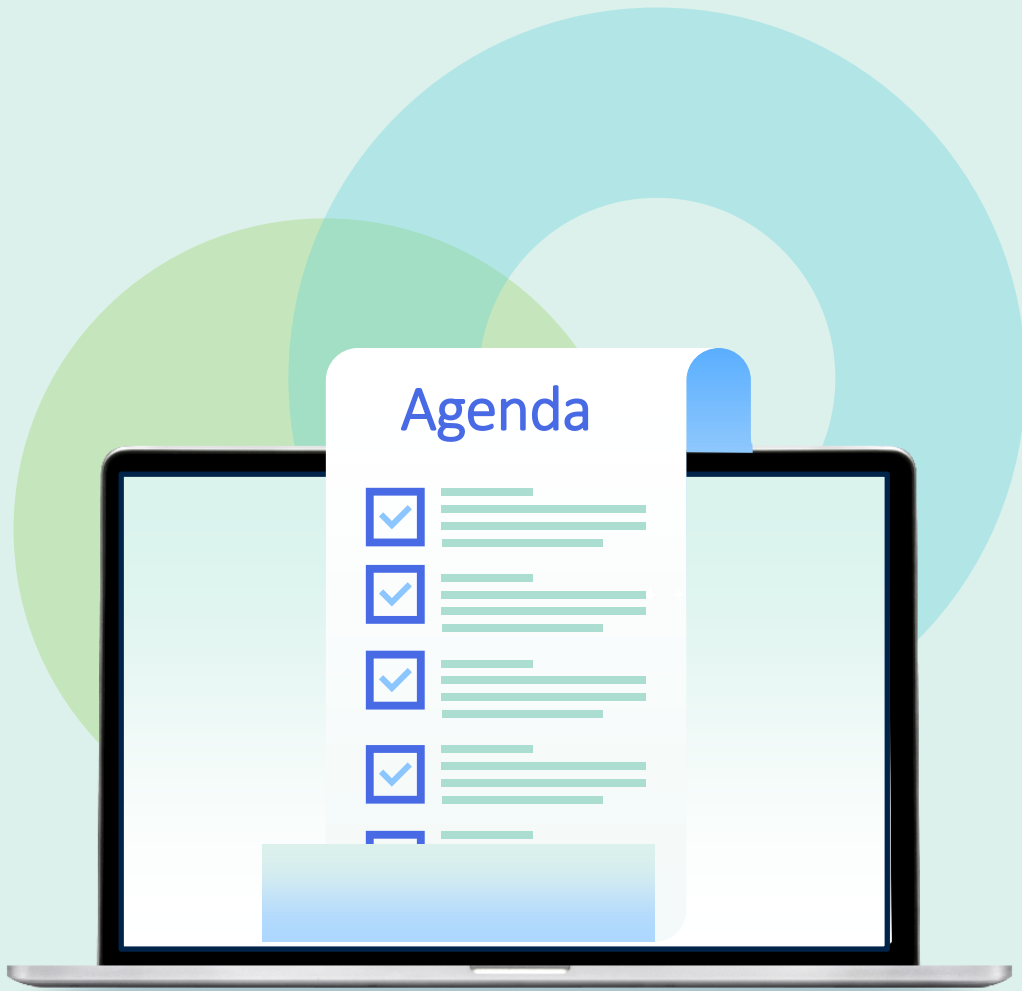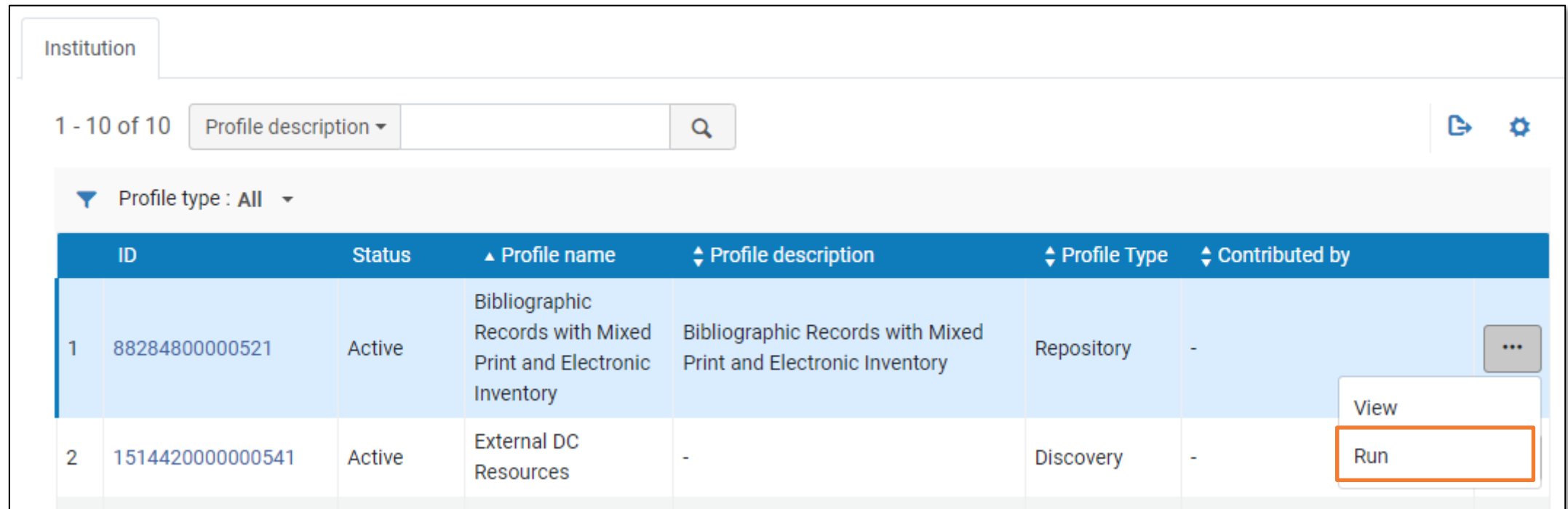Map a source value from the defined field/subfield in the imported record to a specific location in Alma

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Running an Import Profile

- Resources > Import > Import
  or

- Acquisitions > Import > Import

Running an Import Profile – Manual Upload

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

Running an Import Profile – FTP

If Import Protocol is **FTP**
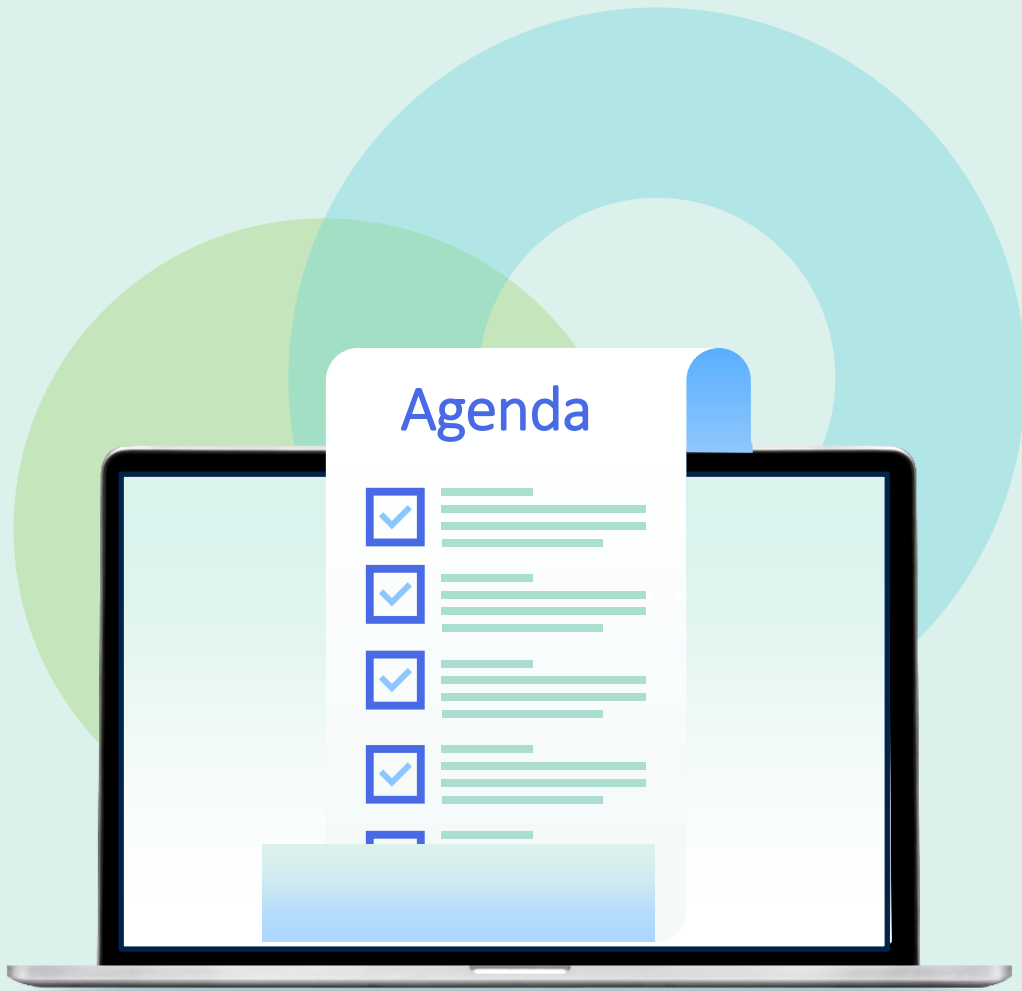
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Monitor and View Import Jobs

- Resources > Import > Monitor and View Imports
  or

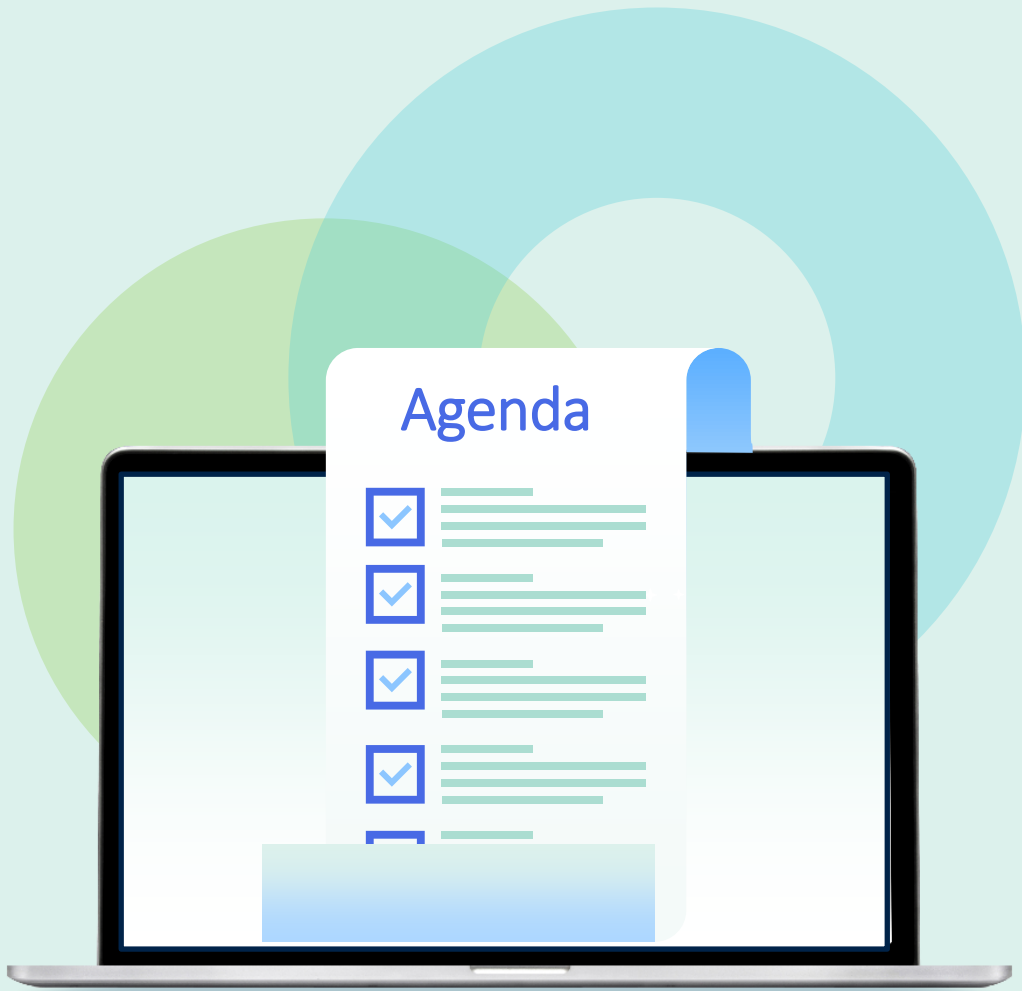- Acquisitions > Import > Monitor and View Imports

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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

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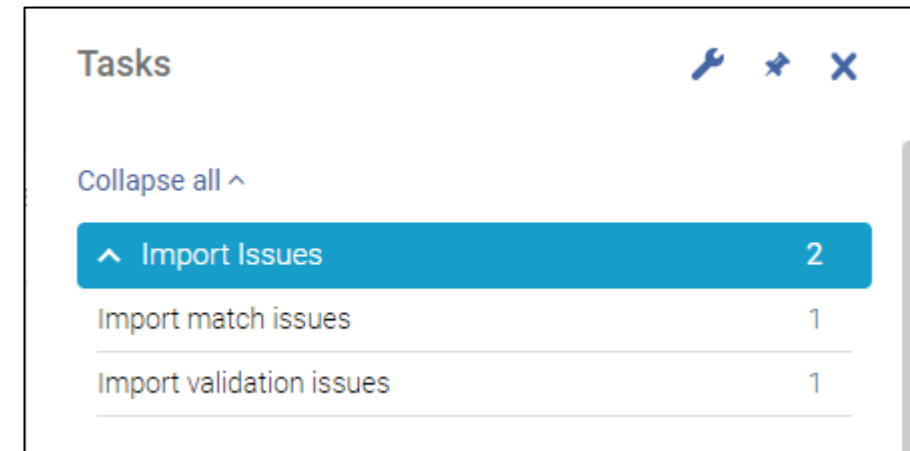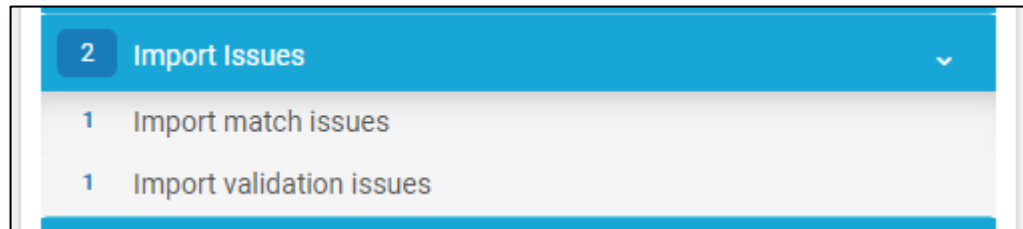
Types of Issues to Resolve

- ## 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

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Further Resources

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Documentation

- [Import Profiles](#)

- [Match Methods](#)

- [Resolving Import Issues](#)

- [Configuring Import Profiles for Primo VE](#)

Premium Workshops
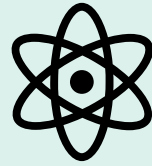
Work directly with product experts

Convenient

Interactive

Share and collaborate

<u>**Upcoming Workshops**</u> | <u>**Frequently Asked Questions**</u> | <u>**Contact Us**</u>

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Thank you!

Please fill out the survey that will appear when you close the WebEx meeting

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