

Import Profiles, EOD

What options are there for importing embedded order records in Alma?

Alma supports the ability to import embedded order records. The rules by which it imports records are defined in “import profiles.” Many import profiles may be setup—for records from different sources, containing different data types, etc.:

Import Profiles Monitor Imp

Institution Community

1 - 20 of 41 Add New Profile

Profile type: All

ID	Profile name	Profile description	Profile Type	Contributed by
1	1450516920000121	Copy of YBP - PromptCat overlay	PromptCat overlay for YBP	Repository
2	1508282580000121	Dawson	Dawson	New Order
3	1363262940000121	Demo - E inventory - import from Nationa...	Demo - E inventory - import from Nationa...	Repository
4	1362534380000121	Demo - New Order - xml - match 035 - phy...	Demo - New Order - xml - match 035 - phy...	New Order
5	1362543860000121	Demo - no inventory - import from Nation...	Demo - no inventory - import from Nation...	Repository
6	1376706250000121	Demo - P inventory - import from Nationa...	Demo - P inventory - import from Nationa...	Repository
7	1222434600000121	Demo - xml - match 035 - physical invent...	Demo - xml - match 035 - physical invent...	Repository

If the library is importing using EOD, it can use one or more profiles that have been created for a particular vendor with specific configurations for the kinds of purchases that are being processed. A vendor can have multiple import profiles with specific configurations for a particular purchase type. For example, different import profiles might exist for purchases being funded through different funds, or for purchases for different libraries in the institution.

The following screen capture is an example of defining inventory information as part of an embedded order profile:

Import Profile Details

Inventory Operations

Electronic Mixed Physical None

Physical Mapping

Mapping Policy Basic Advanced

Material type

Library field subfield

Location field subfield

Default library Default location

Map library/location

Number of items field subfield

Default number

Barcode field

Item policy field

Does Alma automatically generate purchase orders on import of vendors' MARC records?

MARC records with embedded order data can be used to create purchase orders in Alma, as well as create records for the items added to the library’s inventory using data supplied by the individual institution or the library’s materials vendor.

This includes support of vendor approval programs for both print and electronic resources, such as e-books. In this workflow, Alma imports an EOD record (embedded order data) and puts the description into the metadata management systems (MMS), and turns the embedded order information into a PO line.

The library will need to configure the import profile in Alma based on its agreement with the material vendor regarding the specific fields that will be used to supply the order and item information in the MARC record.

Loading EOD files into Alma has the potential to automate the entire acquisitions and cataloging workflow, making it possible to order a resource using the vendor's interface, and unpack and shelve the materials with minimal effort.

Does Alma provide easy correction of errors (e.g. if the wrong record is downloaded at the point of acquisition)?

The import process supports automation as much as possible. For example, the import can be defined to automatically merge an imported record into the catalog in cases where the system found a single match.

If at any stage during the import process, either because of errors, or because the import profile definition requires mediated intervention, the staff user will be able to review issues using a dedicated task list. This task list will provide the staff user with information on what the issue is as well as the relevant actions the user can perform.

A staff user can view the import's records for specific validation or matching errors. He/she then can choose to not import the records, to go ahead with the import, or to stop the import of the entire file.

Handle Matching Back

YBP - Embedded Order Data import

Job ID	762158840000121	File Name	eod_example.xml_1.xml
Profile name	YBP - Embedded Order Data import	Profile description	Gobi order import
Profile Type	New Order	Number of Records	1
Number of Failed Records 1			

1 - 1 of 1 Filter Export

Record ID	Author	Short Title	Publisher	Date	Handling Type
1	9945111000121	-	-	-	Multiple Matches Merge

Import Issues – Specific Import:

Handle Import Validation Errors

Job ID	2305213530000121
Profile name	New Physical orders from Gale
Profile Type	New Order
Number of Failed Records	13

Error List	
1 - 1 of 1	
Error Message	Number of Records
PO line * is not valid 1 since organiz... unit is empty.	13

The staff user also can view the import's records for specific matching issues. He/she then can view the matches found for a specific record, decide which specific one is the actual match, and merge the imported record into it.

View matches of an imported record:

Import Record Matches

Merge Preview Back

Export +	
LDR 01003cam a2200241 a 4500	
003 0CoLC	
005 20140318115517.0	
008 06041462012 enk b 001 0 eng	
020 ... a 978-1594633171 (Hardcover)	
100 1_ a Matthiessen, Peter	
245 00 a In Paradise	
260 ... a Oxford: b Riverhead, c 2014.	
300 ... a 280 pp.	
650 _0 a Subject	
001 ISBN 2 978-1594633171 3 147563736 4 SLJ 5 SLJ47563736 b POL_18032012_150710 c 180312150710 h Printed Book o 3 t GEN s 100 u LEDGER1003-10-20 z USD m 0-135-1 v 0-135-20 6 ULINC	
949	

1 - 2 of 2

Export -

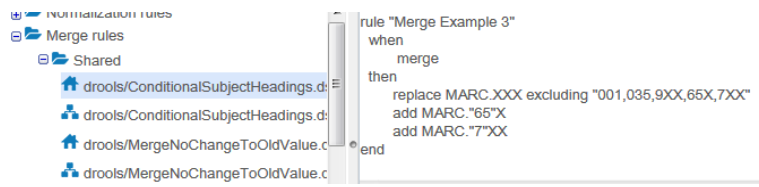
- Author:** Matthiessen, Peter.
Title: In Paradise
Publisher: Riverhead
Date: 2014.
Availability: Physical version at Main Library: General (3 copies, 3 available)
[view](#)
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[view](#)

As part of the matching during the import process, the imported record is evaluated and compared to the institution's catalog. Matches can be done using specific match "profiles" which define how a match is evaluated. There are two types of matches:

- ID-based
- "fuzzy", weighted match vector

The "fuzzy" match method attempts to evaluate a record based on various non-unique identifiers and fields to determine if the imported record and the catalog record are in fact duplicates.

Alma also will use out of the box or institution-defined merge rules to calculate the new record content. These rules determine which fields are preserved in the existing catalog record, and which fields will be imported from the import record.



Total views:

6533