

## How to create electronic inventory in append projects in Alma

- **Product:** Alma
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### Question

How do you create electronic inventory in append projects?

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#### Note

"Incoming library" refers to the library that is being added or appended to the live Alma environment

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### Answer

#### Test in the Sandbox

1. Confirm all libraries/locations in incoming library's MARC bibliographic extract(s) exist in Alma
2. Create local electronic collection
3. Create import profile of type 'Repository' that creates physical inventory
4. Create import profile of type 'Repository' that creates electronic portfolios. Configure to match on MMSID.
5. Use import profile that creates physical inventory to import a subset of the incoming library's MARC bibliographic records (the majority should represent electronic inventory)
6. Create an 'All Titles' set of the imported records
7. Run 'Export Bibliographic Records' job to export the set of records
8. Use import profile that creates electronic portfolios to import records

#### Prepare Production environment

1. Confirm all libraries/locations in incoming library's MARC bibliographic extract(s) exist in Alma
2. Create a local electronic collection
3. Create import profile of type 'Repository' that creates electronic portfolios. Configure to match on MMSID.
4. Optional - disable publishing jobs

#### Migration

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#### Note

There is no merging or deduping of inventory. MMSID in 001 and in MARC View of append library's MARC bibs will not match so they must be synced

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1. AMO migrates data
2. Create an 'All Titles' set of all append library's bib records
3. To sync the MMSIDs
  - Run Synchronize with OCLC job to set the records to \*not\* publish (assuming library does not want these records published to OCLC).
  - Another option would be to sync the MMSIDs via a normalization process that does nothing. (See attachment for an example)
4. Create an 'All Titles' set of the incoming library's records that represent electronic inventory
5. Run 'Export Bibliographic Records' job to export the set of records
6. Use import profile that creates electronic portfolios to import records
7. Clean-up physical inventory that represents electronic inventory

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