

IMPORTING LOCAL FILES FROM OCLC CONNEXION TO ALMA

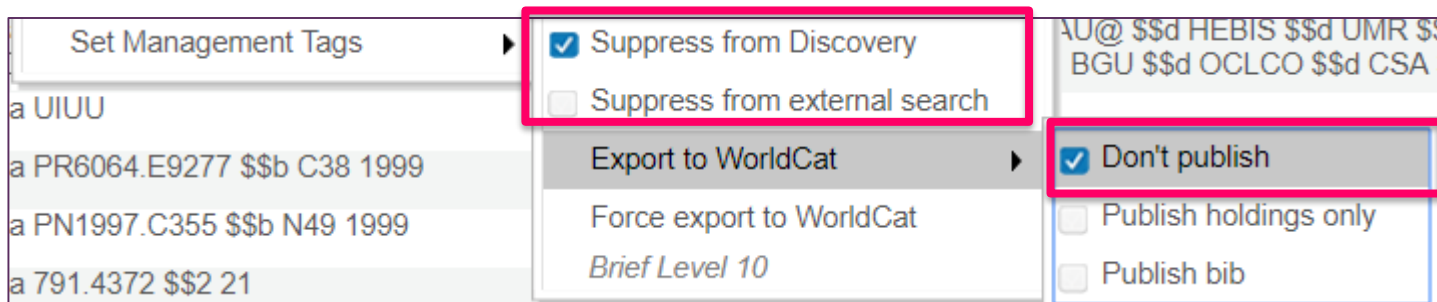


Office Hours 5/14/2020

- Update to the April 27 Office Hour on Data Sync Collections
- Importing Local Files from OCLC Connexion to Alma after Go Live
 - Import a single bib record at a time
 - Import the full bib file with inventory created
- Open Q&A

LDR/05="d" (Deleted) is set in Alma when you select the flags:

- Suppress (a bib) from discovery (Primo VE) + **Don't publish**
- Suppress (a bib) from external search (Z39.50) + **Don't publish**



MD Editor > Tools > Set Management Tags > Export to WorldCat

Update from April 27 Office Hour presentation:

- Suppress from Discovery + **Publish bib will add** your holding in WorldCat

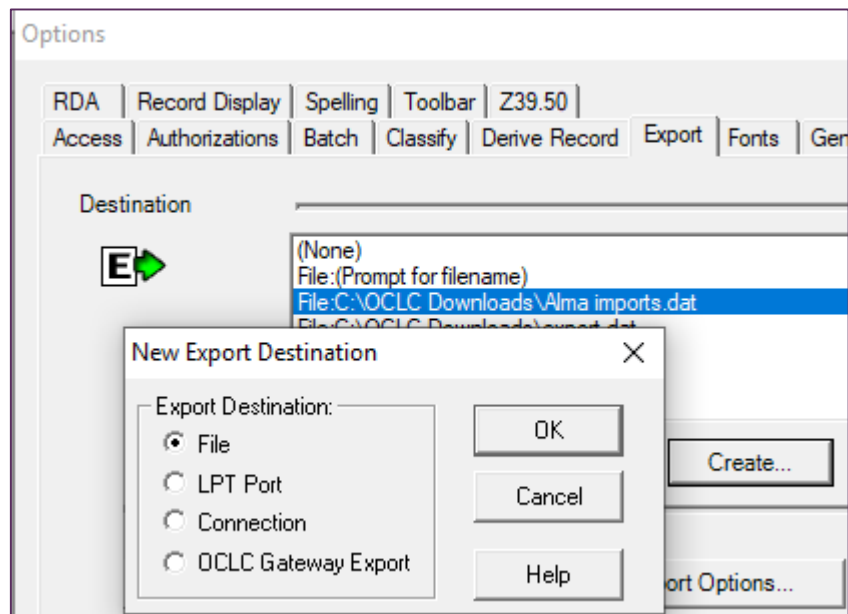
Ideas for Activities During the Technical Freeze

Timing for Cataloging Activities

<p>During Technical Freeze</p>	<ul style="list-style-type: none"> • Continue Cataloging in OCLC Connexion (Client or Browser) - save to a local file on your computer/network • In a <u>Sandbox</u>, practice workflows for importing from a local file using import profiles.
<p>At Go Live</p>	<ul style="list-style-type: none"> • Create an import profile in your production Alma. • Import your saved records

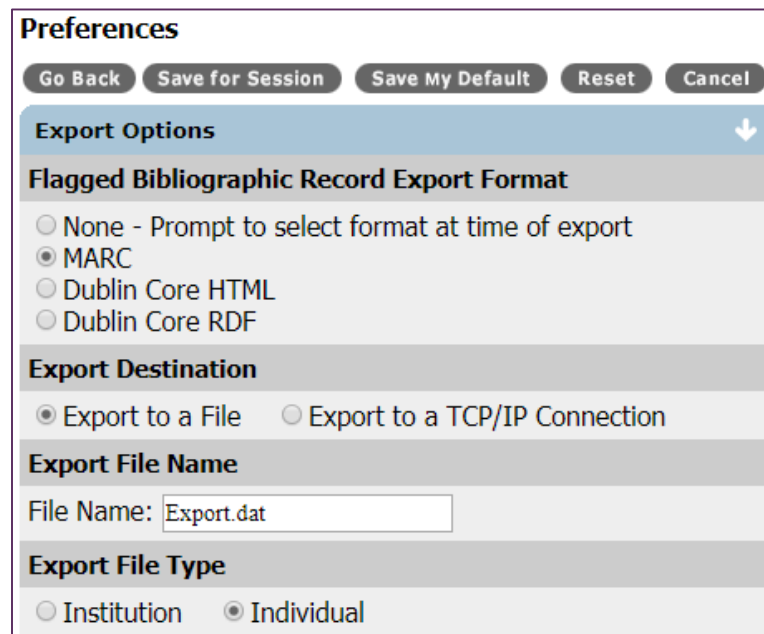
Connexion Client:

Tools > Options > Export > Create >
Export Destination: File.



Connexion Web

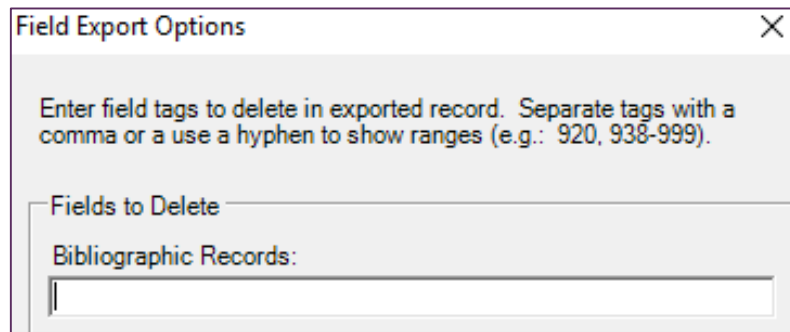
General > Admin > Export Options >
Export to a File



[Exporting Bibliographic Records from WorldCat](#)

Connexion Client:

Tools > Options > Export >
Field Export Options



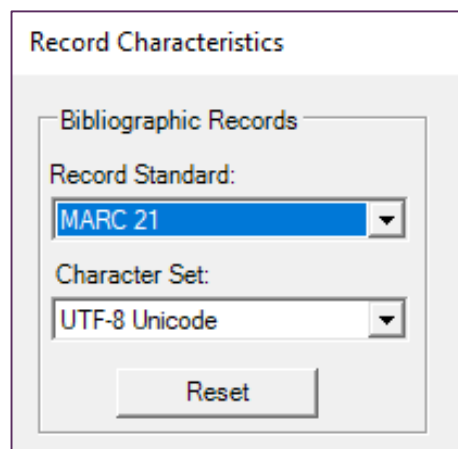
Field Export Options

Enter field tags to delete in exported record. Separate tags with a comma or use a hyphen to show ranges (e.g.: 920, 938-999).

Fields to Delete

Bibliographic Records:

Record Characteristics



Record Characteristics

Bibliographic Records

Record Standard:

MARC 21

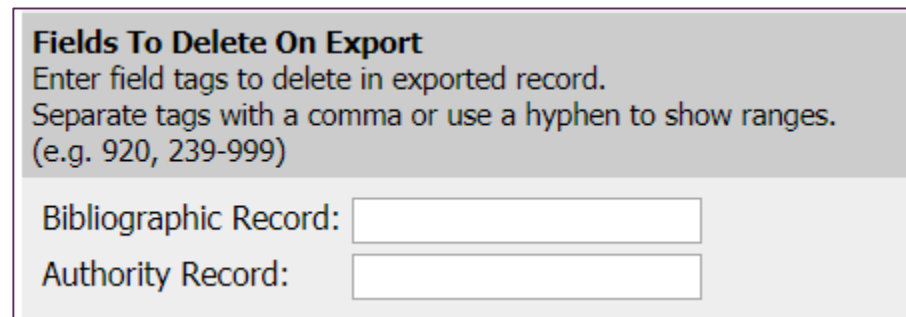
Character Set:

UTF-8 Unicode

Reset

Connexion Web:

General > Admin > Export Options >
Fields to Delete on Export



Fields To Delete On Export

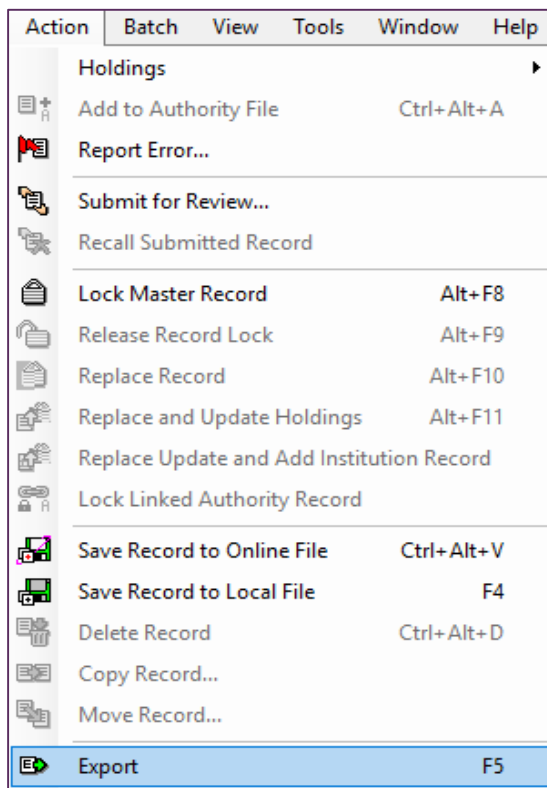
Enter field tags to delete in exported record. Separate tags with a comma or use a hyphen to show ranges. (e.g. 920, 239-999)

Bibliographic Record:

Authority Record:

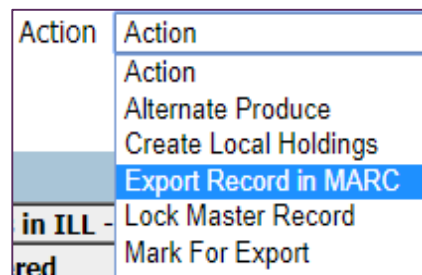
Connexion Client:

Action > Export saves the record to your local file.



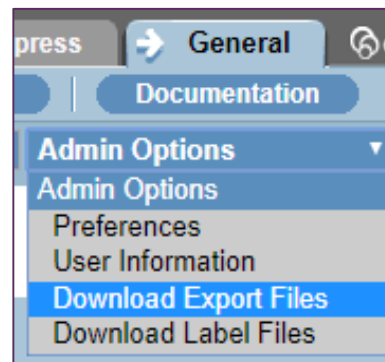
Connexion Web:

Action > Export Record in MARC saves the records online



General > Admin Options >

Download Export Files downloads the file locally.



Role needed:

Catalog administrator or Acquisitions Administrator

Add New Import Profile

A rectangular button with a thin border. On the left is a blue plus sign icon. To its right, the text "Add New Profile" is written in a blue, sans-serif font.

Resources > Manage Import Profiles: Select

Type: Repository

A screenshot of a web interface. At the top left is a blue back arrow icon followed by the text "Import Profile Details". Below this is a horizontal line. Underneath the line is the text "Choose Profile Type". There are four radio button options listed vertically: "New Order", "Update Inventory", "Repository", and "Discovery". The "Repository" option is selected, indicated by a solid blue circle next to its text. The other three options have unselected, light gray radio buttons.

Choose Profile Type

New Order

Update Inventory

Repository

Discovery

Import Profile Details

Profile Details

Use Network Zone

Profile name * **Load OCLC Local File - Physical Bibs With Inventory**

Profile description **Loads bibliographic records representing physical materials to the NZ. Inventory is created based on data added in field 949.**

Originating system * **WorldCat**

File name patterns

Import Protocol **Upload File/s**

Cross walk Yes No

Physical source format **Binary**

Encoding format **UTF-8**

Source format **MARC21 Bibliographic**

Target format **MARC21 Bibliographic**

Status **Active**

Connexion Client Users- select Encoding format= UTF-8

Connexion Web Browser users – select Encoding format= ISO8859-1

< Import Profile Details

Load OCLC Local File - Physical Bibs With Inventory

Profile Type Repository

Filter

Filter out the data using [i](#)

Normalization

Correct the data using **Marc21 Bib Copy 019a to 035z**

Validation Exception Profile

Handle invalid data using **MarcXML Bib Import**

Network Zone Records Handling

Import local extensions No Yes [i](#)

ALMA IMPORT PROFILE – STEP 4: MATCH PROFILE

Profile Details

Normalization & Validation

Match Profile

Set Management Tags

Inventory Information

Mapping

Match Profile

Match by Serial / Non Serial

Yes No



Serial match method

Unique OCLC Identifier Match Method



Non Serial match method

Unique OCLC Identifier Match Method

Match Actions

Handling method

Automatic Manual



Upon match

Merge Overlay Do Not Import Use NZ Record

Single match - match only record
with the same inventory type
(electronic/physical)



MERGE/OVERLAY

Merge method

Overlay all fields but local

Select Action

- Allow bibliographic record deletion
- Do not override/merge a record with lower brief version
- Do not override Originating System

Community Zone linked records
handling

Skip record

Do not override/merge record with
an older version

Disabled Consider Originating System Ignore Originating System

Automatic Multi-Match Handling

Select Action

- Disregard matches for bibliographic CZ linked records
- Disregard invalid/canceled system control number identifiers
- Prefer record with the same inventory type (electronic/physical)
- Skip and do not import unresolved records

ALMA IMPORT PROFILE – STEP 5: SET MANAGEMENT TAGS

Profile Details

Normalization & Validation

Match Profile

Set Management Tags

Inventory Information

Mapping

Set management tags for all the records imported using this profile

Suppress record/s from publish/delivery

Condition

Only for new records

Suppress record/s from external search

Condition

Only for new records

Synchronize with OCLC

Publish Bibliographic records

Condition

Unconditionally

Synchronize with Libraries Australia

Don't publish

Condition

Only for new records

Inventory operations:

- Electronic
 - Mixed
 - Physical
 - None
- For importing single records at a time with no inventory, profile would have:

Inventory Operations

Electronic Mixed Physical None

ALMA IMPORT PROFILE – STEP 6: INVENTORY INFORMATION

Physical Mapping

Mapping Policy Basic Advanced

Material type

Library field

Location field

Default library X ☰ ↺

Map library/location

Number of items field

Default number

Barcode field

Item policy field

Default item policy

Item Call Number

subfield

subfield

Default location

subfield

subfield

subfield

subfield

Holdings Records Mapping

[+ Add Holdings Mapping](#)

Input Record Tag	Input Record Subfields	Holdings Record Tag	Holdings Record Subfields
1 949	h	852	h
2 949	i	852	i

Update holdings call number

Example: 949 #a MAIN #b reference #c 1 #d A123456789 #e Two Week Loan #h TP156.E8 #i H8 1969

Ex Libris Import Profile Resources:

Alma Certification Training Videos:

- [Resources 07: Import Profiles Part I: Descriptive Metadata \(19 min\)](#)
- [Resources 08: Import Profiles Part II: Inventory Creation \(17 min\)](#)

Documentation:

- [Managing Import Profiles](#)
- [Importing Records Using an Import Profile](#)

[CARLI MarcEdit Resources](#)

Demo of Upload Single Record From File

Configure for Use:

Configuration > General: Other Settings > upload_single_record_from_file

- Select ellipses > Customize > copy in the name of the Import Profile.

upload_single_record_from_file	repository	Upload Single Record from a Local File
--------------------------------	------------	--

If more than 1 record in the local file, split it:

- 1 record only will process; if you have more, MarcEdit's MarcSplit Utility can split the file into 1 record per file.

Run:

Resources > Upload Single Record From File >

Select File > Submit or Submit and Edit > Manually add inventory

Demo of Importing a File With Inventory

Resources > Import

Select Ellipses of Import Profile you wish to use > Run >
Select File > Add > Submit

Review the records when completed:

Select Ellipses > Report > Bibliographic Records Imported >
Select Ellipses > Preview records

*This workflow can also be used for importing records without inventory.

Q&A on any Alma/Primo VE topics



Thank you!

Please contact us at
support@carli.illinois.edu
with additional questions.

