

## Alma and Primo Integration Overview (~4 minutes)

Welcome to this training session on Alma and Primo VE Integration.

In this session, you will learn how Alma works with Primo to provide your users access to your libraries' collections. **You'll see how resources display in both Alma and Primo, and how the relevant inventory and availability information displays to your users in Primo. And you'll also see how users can place requests and access their library card information.**

**Your library** collections include the data you have in your Institution Zone and Network Zones, the records you've loaded into Alma, and the records that you have activated from the Community Zone.

And Primo is configured to serve as the discovery interface to all of these materials.

Primo VE optimizes the management of Primo with Alma by utilizing the Alma platform.

With Primo VE, libraries can manage both Alma and Primo from the same interface. As you maintain your local records in Alma, they are indexed and visible within 15 minutes in the Primo user interface.

And most configuration changes made in Primo VE appear immediately in the Primo user interface as well!

Let's see a few records in Alma, and then see how they appear in Primo to our patrons.

In Alma, you can search for an item, and then see its holdings by clicking on the Physical link here.

### **From Alma it's possible to go directly to the record in Discovery, too!**

And when you Edit the record, you are able to see and edit its MARC data in the Metadata Editor.

In Primo, you can search for the same record, and see similar information presented. Here, you can see the holdings information in the Get It section, and you can find more information about the resource in the Details section.

Let's see another record, this time a record that is available both in the library, and online.

This time in Alma, you will notice that there are two records, one for the physical book, and one for the e-book. For the e-book, selecting the Electronic link will give you the information about where the e-book can be accessed. With the physical item, again, you will see the holdings information.

In Primo, the same search brings back one result – a combined record for both the electronic and physical holdings. In the online access section, there is a link to the full text e-book via the collection here, and in the Get It section there are a few places that you can go to find the book.

In addition to discovering resources in Primo, your patrons can also access their account information.

If you want to see your library account information, you can hover over your name and then select Library Card. From this screen you can see an overview of the books you have on loan, your fines and fees, requests, and any blocks or messages pertaining to your account.

Thank you for watching!

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