**Alma Essentials**

Alma and Primo Integration Overview

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. You will also see how users can access their library card information.

Your library collections include the data you have in your Institution Zone and Network Zones, the records you have 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 as a physical book, and online as an e-book.

This title has both Physical and Electronic holdings. Under Physical, we see the location of the book. Under Electronic, we see a link for accessing the e-book.

Select Display in Discovery to see the record in Primo. Under View Online, we see a link to the e-book. Under Get it, we see the location in the library.

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

If you want to see your library account information, click on 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!