



Alma Primo Interoperability
(For non-consortium)

Tami Ezra | Business Analyst

ExLibris
a ProQuest Company

Objectives

By the end of this session you will understand:

- The main aspects of Alma-Primo interoperability
 - Publishing
 - Delivery
 - Alma as Link Resolver/ERM
- How to setup Alma for Primo / Primo for Alma

Agenda

1

Alma and Primo – the big picture

2

Publishing

3

Delivery

4

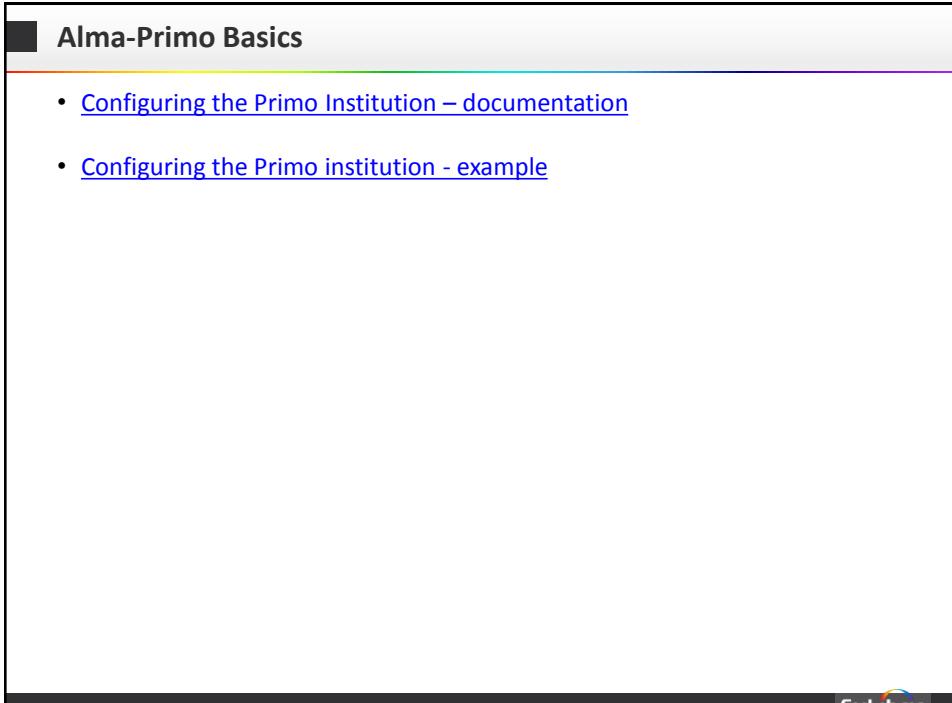
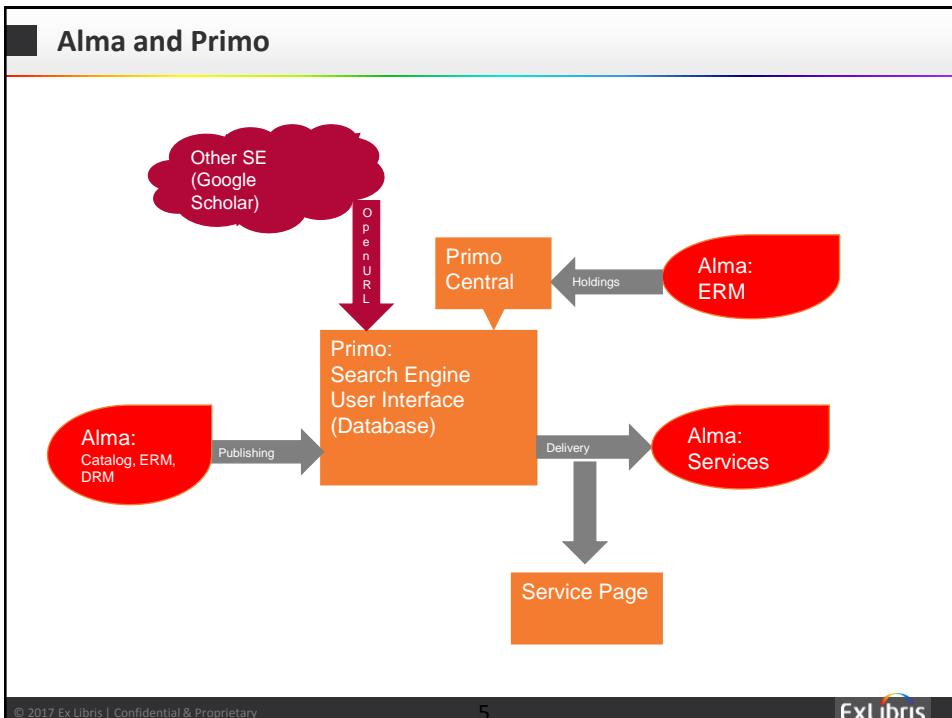
Alma as Link Resolver / ERM

5

And some more

Alma and Primo – the big picture







Alma-Primo : Publishing

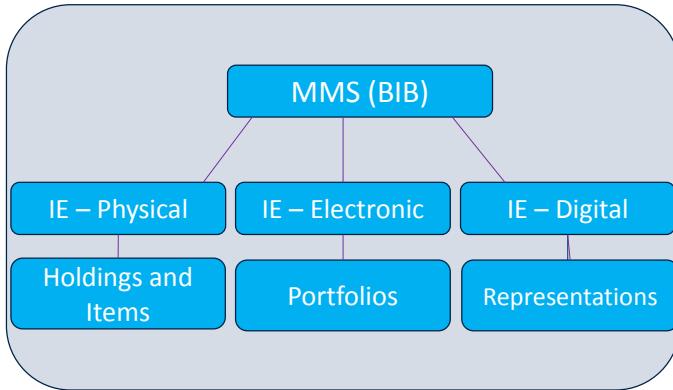
- Alma record structure → Primo
- The publishing process
- Suppressing records
- Key fields in published Alma record
- Key fields in normalizing to the PNX
- Deduping Alma records in Primo

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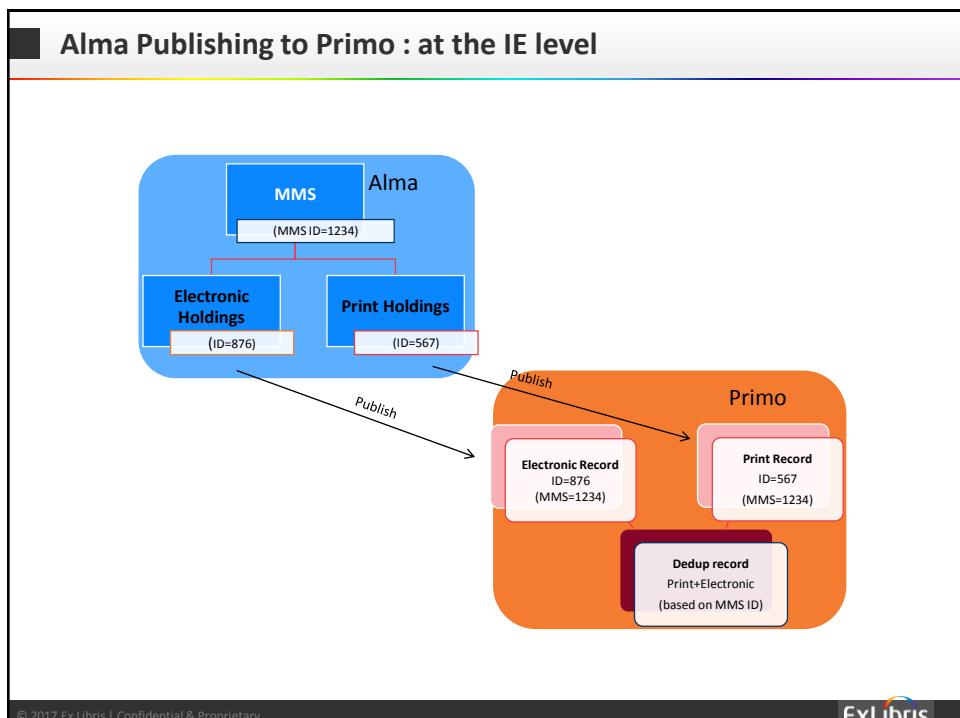
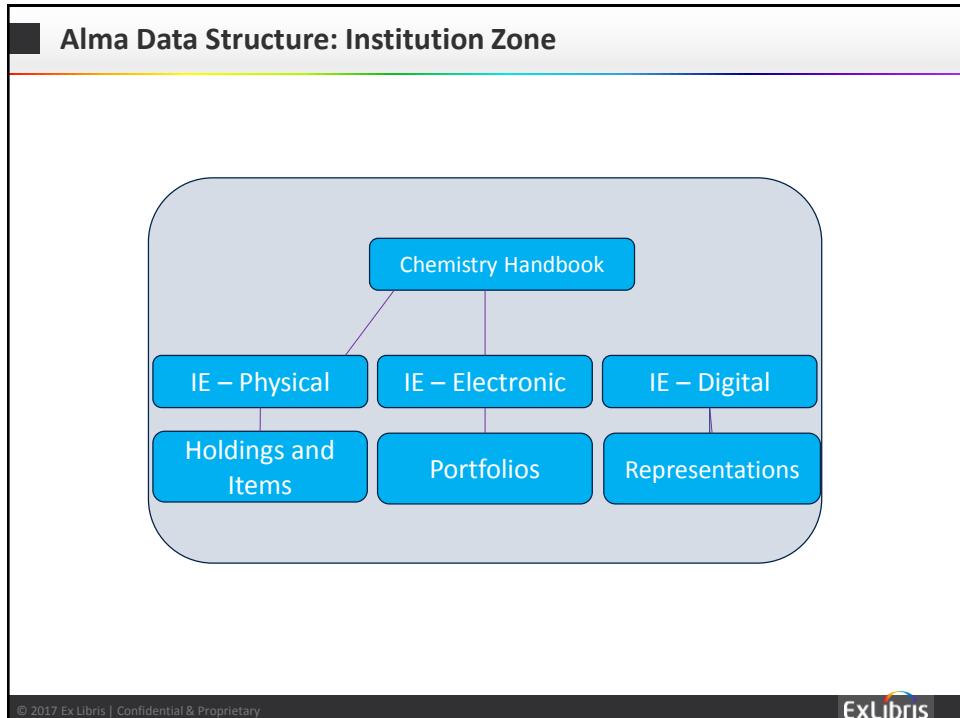


Alma Data Structure: Institution Zone



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Primo Publishing Profile

Publishing Profile Details

- The predefined Electronic, Physical, and Digital options in the Content Options section should not be modified.
- The Run Publishing By Dates Range option is a tool available for troubleshooting Alma to Primo publishing in the event of a publishing error or consent from third-line Support staff.

Profile Details	Profile name * Publish bibliographic records to Primo
Profile description	Setup the parameters for publishing bibliographic records to Primo
Publishing Parameters	
Run full publishing	<input type="checkbox"/>
Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Scheduling	Every 6 hours, starting at 01:00
Email Notifications	
Submission Format	
FTP configuration	
Sub-directory	Prime Automation/QAC01
Content Options	
Electronic	<input checked="" type="checkbox"/>
Physical	<input checked="" type="checkbox"/>
Digital	<input checked="" type="checkbox"/>
Collection	<input checked="" type="checkbox"/>
Course information enrichment	<input checked="" type="checkbox"/>
Related records information enrichment	<input checked="" type="checkbox"/>
Linked Data enrichment	<input checked="" type="checkbox"/>
Headings enrichment	<input checked="" type="checkbox"/>
Heading enrichment – enrich with “See Also” fields	<input checked="" type="checkbox"/>
Physical Inventory Enrichment	
Quick Add	<input type="checkbox"/>
Holding Tag	<input type="checkbox"/>
Holding Subfield	<input type="checkbox"/>
Bib Tag	<input type="checkbox"/>
Bib Subfield	<input type="checkbox"/>

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Publishing Modes

Full Publishing:

- Initial publishing of all Alma data (typically at the beginning of the project)

once completed automatically changes to:

Incremental Publishing:

- On-going publishing of new, updated and deleted records several times a day

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Publishing sets of record ad hoc

- In principle any change that affects the content of the published record should trigger standard re-publishing
- This job can be useful if you want to change the content of published records. For example - add Course Reserve information to Primo
 - In Publishing Profile → check “Course Information”
 - Create set of records linked to a course
 - Run job

The screenshot shows the Alma interface for publishing. At the top, there's a navigation bar with tabs like 'Tasks', 'Analytics', and 'Help'. Below it is a search bar and a 'Run a Job' button. The main area displays a table of task chains:

	Name	Description	Content Type	Type
1	Primo Republish Set of Titles	Primo Republish Set of Titles	Publishing bulk	Publishing
2	Holding OCLC Republish Set of Titles	Holding OCLC Republish Set of Titles	Publishing bulk	Publishing
3	Bib OCLC Republish Set of Titles	Bib OCLC Republish Set of Titles	Publishing bulk	Publishing

At the bottom right of the interface is the Ex Libris logo.

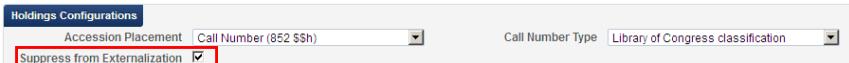
Suppress Records from Publishing

Suppress individual bibliographic and holdings records from publishing

The screenshot shows the Alma MD Editor interface. On the left, there's a sidebar with 'Templates' and 'Records' sections. The main area shows a list of bibliographic fields (008, 100, 245, 250, 260, 300, 656) with their corresponding values. A context menu is open over the '100' field, with the 'Set Management Tags' option highlighted. A submenu for 'Set Management Tags' is open, showing three options: 'Suppress from Discovery' (checked), 'Export to OCLC', and 'Brief?'. The Ex Libris logo is at the bottom right.

SUPPRESS RECORDS FROM PUBLISHING

- Suppress inventory belonging to specific locations – Alma location level setup



The screenshot shows the 'Holdings Configurations' interface. At the top, there are dropdown menus for 'Accession Placement' (set to 'Call Number (852 \$Sh)') and 'Call Number Type' (set to 'Library of Congress classification'). Below these is a checkbox labeled 'Suppress from Externalization' which is checked and highlighted with a red border.

Table Information

Table Information		Organization Unit List	
Sub System	INVENTORY	Table Name	ExcludeProcessTypePublishing
Updated By	-	Last Updated	-
Table Description	Process Types to Exclude from Publishing		
Mapping Table Rows			
Enabled	Process Type	Exclude	Updated By
<input checked="" type="checkbox"/>	Acquisition	<input checked="" type="checkbox"/> True	Ex Libris
<input checked="" type="checkbox"/>	Claimed Returned	<input checked="" type="checkbox"/> True	Ex Libris

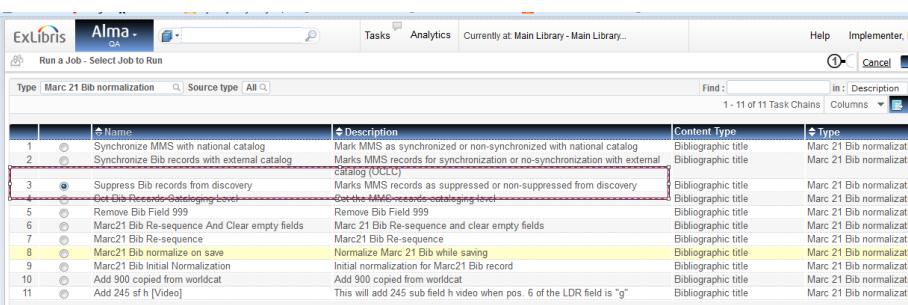
Create a New Mapping Row

Process Type	Acquisition	Exclude	False
Add Row			

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SUPPRESS RECORDS FROM PUBLISHING

- Job: Suppress BIB records from Discovery



The screenshot shows the Alma Job Runner interface. The title bar says 'Run a Job - Select Job to Run'. The main area displays a table of tasks:

#	Name	Description	Content Type	Type
1	Synchronize MMS with national catalog	Mark MMS as synchronized or non-synchronized with national catalog	Bibliographic title	Marc 21 Bib normalization
2	Synchronize Bib records with external catalog	Marks MMS records for synchronization or no-synchronization with external catalog (OLC)	Bibliographic title	Marc 21 Bib normalization
3	Suppress Bib records from discovery	Marks MMS records as suppressed or non-suppressed from discovery	Bibliographic title	Marc 21 Bib normalization
4	Get bib records Cataloging Level	Get the MMS records cataloging level	Bibliographic title	Marc 21 Bib normalization
5	Remove Bib Field 999	Remove Bib Field 999	Bibliographic title	Marc 21 Bib normalization
6	Marc21 Bib Re-sequence And Clear empty fields	Marc 21 Bib Re-sequence and clear empty fields	Bibliographic title	Marc 21 Bib normalization
7	Marc21 Bib Re-sequence	Marc21 Bib Re-sequence	Bibliographic title	Marc 21 Bib normalization
8	Marc21 Bib normalize on save	Normalize Marc 21 Bib while saving	Bibliographic title	Marc 21 Bib normalization
9	Marc21 Bib Initial Normalization	Initial normalization for Marc21 Bib record	Bibliographic title	Marc 21 Bib normalization
10	Add 900 copied from worldcat	Add 900 copied from worldcat	Bibliographic title	Marc 21 Bib normalization
11	Add 245 sf h [Video]	This will add 245 sub field h video when pos. 6 of the LDR field is "g"	Bibliographic title	Marc 21 Bib normalization

Find: in: Description
 1 - 11 of 11 Task Chains 

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Publishing in Primo

- Data source – one per Alma institution
- Normalization rules → PNX
 - Use the Alma MARC/DC Template as basis for creating your own rules
- Pipe
 - Regular
 - “Update pipe”
- Dedup – important to dedup based on MMS

Key Fields

- IE-ID – sent in the header
- 001 – MMS ID
- INST – institution
- INT – entity type: Physical/ Electronic / Digital / Collection
- AVA – physical inventory per location
 - \$\$a – Institution code
 - \$\$b – Library code
 - \$\$c – Location display name
 - \$\$d – Call number
 - \$\$e – Availability - available, unavailable, or check_holdings).
 - \$\$j – Location code
 - \$\$k – Call number type
 - \$\$p – priority

Deduping Alma Records

- Dedup based on MMS to merge E/P/D linked to same MMS
- MMS added to C5.
- Match on C5 is first step in dedup process
- If you want to disable dedup – keep match on C5 and disable creation of other keys

Key Fields

- CNO – course information
- ECT – indicates if the record is a database
- PLK – links between records
- Cross-references can be included in Author and Subject fields
- AVD - for D inventory. Not used OTB
 - \$\$a – Institution code
 - \$\$b – Representation PID
 - \$\$c – Representation type: REPRESENTATION or REMOTE_REPRESENTATION
 - \$\$d – Remote repository name (if this is a remote representation)
 - \$\$e – Representation's label
 - \$\$f – Public note
- AVE - for E-inventory acquired centrally
 - \$\$i – contains a single e-resource's Available for institution code
 - \$\$c – contains a single e-resource's Available for campus code
 - \$\$l – contains a single e-resource's Available for library code

Normalizing Alma Records

Section	Field	
Control	almaid	Combines Alma institution code and IE-ID. E.g: 01BC_INST:2110003770001021 Used in requests for Alma services
Display	availlibrary	Based on AVA
	crsinfo	For course reserve information. Based on CNO
	type	ECT="database"
Links	thumbnail	For Alma-D
Search	searchscope	For AZ list For collections
	General	MMS

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Normalizing Alma Records

Section	Field	
Facets	AZ	For Journal A-Z list
	crsname, crsinst crsid, crsdept	Facets for course reserves
Dedup	C5	For MMS
Delivery	institution	INST
	delcategory	INT <ul style="list-style-type: none"> • P → Alma-P • E → Alma-E • D → Alma-D
Display Sort Facets Dedup FRBR	creator, contributor, subject, title, uniform title	Suppression of non-preferred

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Sample Records

- [Alma Demo](#) (primo_alma*)

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IZ Published Record

```
<controlfield tag="001">992234070001021</controlfield>
<datafield tag="OWN" ind1=" " ind2=" ">
<subfield code="a">OL</subfield></datafield>
<datafield tag="INT" ind1=" " ind2=" ">
<subfield code="a">P</subfield></datafield>
<datafield tag="INST" ind1=" " ind2=" ">
<subfield code="a">01BC_INST</subfield></datafield>
<datafield tag="AVA" ind1=" " ind2=" ">
<subfield code="a">01BC_INST</subfield>
<subfield code="b">GOV</subfield>
<subfield code="c">Stacks</subfield>
<subfield code="d">L 2.71:455-4</subfield>
<subfield code="e">available</subfield>
<subfield code="f">1</subfield>
<subfield code="g">0</subfield>
<subfield code="j">STACK</subfield>
<subfield code="k">3</subfield>
<subfield code="p">1</subfield>
</datafield>
```

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IZ Published PNX

```

<control>
<sourcerecordid>2110001860001021</sourcerecordid>
<sourceid>primo_alma</sourceid>
<recordid>primo_alma2110001860001021</recordid>
<originalsourceid>01BC_INST</originalsourceid>
<sourceformat>MARC21</sourceformat>
<sourcesystem>Alma</sourcesystem>
<almaid>01BC_INST:2110001860001021</almaid>
</control>
<display>
<availlibrary>$I01BC_INST$$LGOV$$1Stacks$$2(L 2.71:455-4
)$$Savailable$$X01BC_INST$$YGOV$$ZSTACK$$P1</availlibrary>
<availinstitution>$I01BC_INST$$Savailable</availinstitution>
<availpnx>available</availpnx>
</display>
<search>
<searchscope>AZ01BC_INST</searchscope>
<facets>
<atoz>C</atoz>
</facets>

```

IZ Publishing PNX

```

<dedup>
<t>1</t>
<c3>consumerexpenditurescteristics</c3>
<c4>1977</c4>
<c5>992234070001021</c5>
<f5>consumerexpenditurescteristics</f5>
<f6>1977</f6>
<f7>consumer expenditure survey series interview survey 1972 73 average annual income and
expenditures for commodity and service groups classified by family characteristics</f7>
</dedup>
<delivery>
<institution>01BC_INST</institution>
<delcategory>Alma-P</delcategory>
</delivery>

```



Alma – Primo : Delivery

- Alma Services: View it and Get It
- Identifying Patrons
- Key concepts in Primo Delivery
- Delivery setup in Primo
- Delivery setup in Alma

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Alma Delivery

Alma Services

- **View It** → for online services , general services
- **Get It** → for physical inventory services, user-based services

[Demo](#)

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Identifying Patrons

- Users sign-in to Primo (PDS or Primo Authentication Manager)
- Users place requests in Alma – how does Alma identify the user?



- PDS/Primo Authentication URL should be added to: Administration > General Configuration > Configuration Menu > General Configuration > Other Settings > primo_pds_url

Key Concepts in Primo Delivery

- Availability
 - P – based on circulation status
 - E – restricted / not restricted → based on restricted delivery scopes
 - D – restricted / not restricted → based on restricted delivery scopes
 - Primo Central – based on full-text availability
- Delivery:
 - GetIt 1 – main delivery option
 - GetIt 2 – secondary delivery option
 - Delivery is defined per “Delivery Category” and “Availability status”

Delivery Categories

- Local Data ingested from Alma:
 - P inventory → Alma-P
 - E inventory → Alma-E
 - D inventory → Alma-D
- A record will be assigned up to two delivery categories so that both electronic and physical are represented.
 - Every delivery category will be represented in availability
 - Every delivery category will be assigned a Get It 1
- Primo Central records: Remote Search Resource

Physical Availability and RTA

- Based on status in AVA (\$\$e) : available, check_holdings, unavailable
- Retrieved in real time using “RTA” in same format as published record
 - Alma normalization rules set must be defined in “Real-Time Availability (using normalization rules)”
- Calculated availability status
 - If at least one AVA = “available” → available_in_maininstitution
 - If at least one AVA = check_holdings” → check_holdings_in_maininstitution
 - Else → “unavailable_in_maininstitution”
- Labels are defined in “Calculated Availability Status”
- Display of “Best Location”
 - Determined based on location that matches status and then priority in AVA \$\$p

Availability for E/D - Restricted Delivery Scopes

- Tag on PNX to indicate access is restricted – if user does not meet conditions the status will be “restricted”
- How to setup?
 - Define as scope of type “Delivery” → Scope Values definition
 - Add to the normalization rules → in Delivery section
 - Defined allowed users → “Restricted Delivery Scopes”

Delivery Setup in Primo

- Delivery mapping tables
 - MT: GetIt Link 1/2 Configuration
 - MT: Templates
 - CT: Calculated Availability Status
 - CT: GetIt Tab1 and Tab2

Delivery Setup in Alma

- View it and Get It skins
- Labels
- Display Logic
- General Electronic Services
- Physical inventory
 - Holdings record display
 - Location priority
 - Item sort routines
- Electronic inventory
 - Order of services
 - Direct Linking
 - Related Services
 - License display
- Digital inventory
 - Max number of representations

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View it and Get It skins

- Defines CSS for the View it and Get It
- Administration → General Configuration → User Interface Settings → Delivery System Skins
- Skin ID should = Primo View ID
 - Else the skin ID needs to be added to the Viewit and GetIt delivery templates
 - Classic/New UI – flag indicating if skin is for classic or new
 - Can be problematic if same view is used since the templates are shared between classic and new UI
 - Solution: create separate views.
 - Future: Alma will enable single Skin ID for both classic and new

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Labels

- Fulfilment Configuration → Discovery Interface Display Logic → Labels

Display Logic

- Fulfilment Configuration → Discovery Interface Display Logic →
Display Logic Rules
 - Lets customers suppress specific services in specific scenarios

General Electronic Services

- Lets customers add services (not unlike Primo “links”)
- Fulfillment Configuration → Configuration Menu → Discovery Interface Display Logic → General Electronic Service & General Electronic Services Order

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Electronic Inventory

- Fulfillment Configuration → Configuration Menu → Discovery Interface Display Logic:
 - Order: → Online Services Order
 - Direct linking: → Direct Linking
 - Display License → Other setting
 - Related Services → Related Records

Full text available at: [EBSCOhost Education Research Complete](#)

Services For Related Titles

Handbook of Environmental Education (Additional form)

Full text available at: [EBSCOhost Education Research Complete](#)

Available from 1994 until 1994

The Philosophy Of Mathematics Education (Additional form)

Full text available at: [EBSCOhost Education Research Complete](#)

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Digital Inventory

- Fulfillment Configuration → Configuration Menu → Discovery Interface Display Logic → Other options
 - Max. number of representation in View IT
 - After this number View It will open in a new tab, filters will display

Physical Inventory

- Holdings record display
 - 852, 866, 867 always display
 - To display 541, 561, 563, 868
 - Fulfilment Configuration → Discovery Interface Display Logic → Other Settings → display_additional_holding_fields_in_getit set to 'true'
- Location Priorities
 - Fulfilment Configuration → Discovery Interface Display Logic → Locations Ordering Profiles
- Item sort routines
 - Resource Management Configuration → General → Physical Items Sort Routines



Alma as Link Resolver / ERM

- Publish holdings to Primo Central
- The Services Page

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Publish Holdings to Primo Central

- Publish Alma data to Primo Central

Publishing Profiles				
Add Profile		1 - 5 of 5 Records		
Active	Name	Description	Last Run	Actions
✓	Publish bib records to Primo	Setup the parameters for publishing bibliographic records to Primo	-	Actions
✓	Synchronize local holdings with OCLC	Synchronize local holdings with OCLC	-	Actions
✓	Synchronize bibliographic records with OCLC	Synchronize bibliographic records with OCLC	-	Actions
✓	Publish electronic records to Primo Central	Publish electronic records to Primo Central	22/04/2013	Actions
✓	Publish electronic records to Google Central	Publish electronic records to Google Scholar	-	Actions

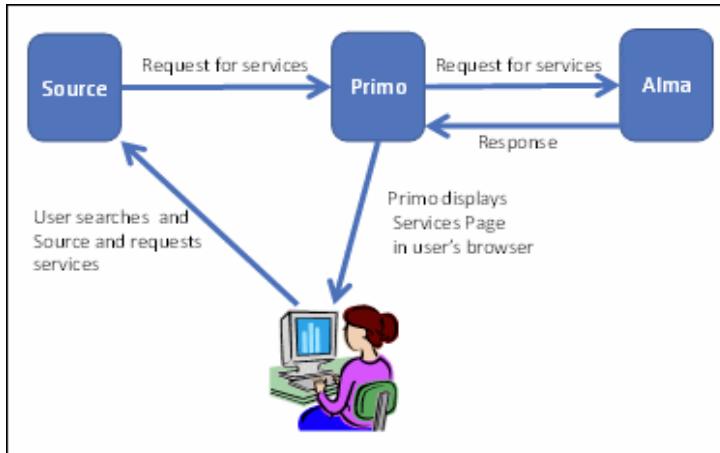
- Specify in the Registration system the location of the holdings file

 My Profile > View Client	
Customer name: DEMO_SERVER Institution name: EXLDEV1_INST	Enrollment date: 07/04/2012 09:43 AM Enrollment date: 07/04/2012 09:43 AM
Client Attributes Learn More	
Client name: PRIMO Client UID: MarinaS_EXLDEV1_INST_PPRD Registered application: Primo Environment type: Production FE1 host name and port: demo.alma.exlibrisgroup.com:1701	SFX institutional holdings file URL: http://demo.alma.exlibrisgroup.com/rep/getFile?institution_code=EXLDEV1_INST&file=institutional_holding
BO host name and port: demo.alma.exlibrisgroup.com:1601	
Edit Client Attributes	

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The Alma Services Page



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Example

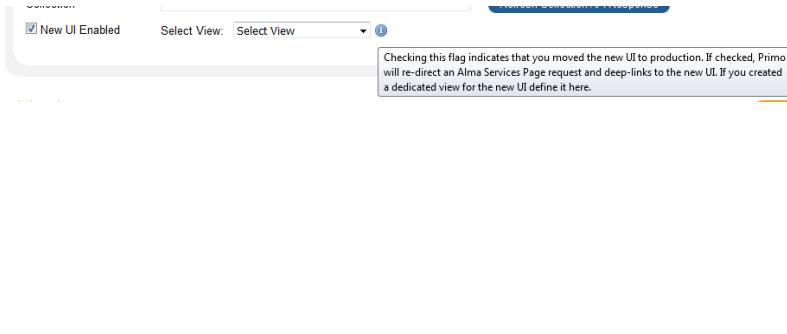
- [Example](#)

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Services Page Base URL

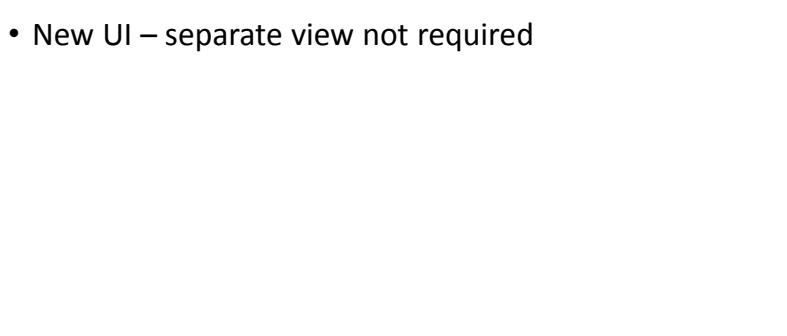
- Classic and New UI:
`http://primo server host/openurl/<primo institution_code>/<primo view_code>?`
- For NUI – must set “New UI Enabled”



The screenshot shows a configuration interface for a services page. At the top, there is a checkbox labeled "New UI Enabled" which is checked. Next to it is a dropdown menu labeled "Select View" with an arrow pointing down. Below these controls is a tooltip box containing the following text: "Checking this flag indicates that you moved the new UI to production. If checked, Primo will re-direct an Alma Services Page request and deep-links to the new UI. If you created a dedicated view for the new UI define it here." At the bottom of the interface, there is a copyright notice: "© 2017 Ex Libris | Confidential & Proprietary" and the Ex Libris logo.

Services Page - Configuration

- Classic UI – required a separate
 - Step 1 - Create Primo view by copying it from the default services page view
 - Step 2 – Configure View
- New UI – separate view not required



The screenshot shows the same configuration interface as the previous one, but with a different focus. It highlights the "New UI Enabled" checkbox, which is checked, and the "Select View" dropdown menu. The tooltip box below the "Select View" dropdown is also visible. The bottom of the interface includes the copyright notice "© 2017 Ex Libris | Confidential & Proprietary" and the Ex Libris logo.

Services Page – Delivery Configuration

Services Page Delivery :

- Delivery category – Remote Search Resource
- Availability statuses:
 - viewit_FT
 - viewit_getit_NFT
 - viewit_getit_FT
 - viewit_getit_NFT
 - getit

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Alma-Primo : Some additional interoperability points

- Browse
- Course Reserves
- Linking Records
- Collection Discovery



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Browse

Select the list to browse

	No. of records	Entry
Author	1	ABC (A Better Chance)
Title		ABC, active 17th century. See: A. B. C., active 17th century
Subject		ABC (American Botanical Council). See: American Botanical Council
Library of Congress call number		ABC (Anarchist Black Cross). See: Anarchist Black Cross
NLM call number		
Dewey call number		
SUDOC call number		
Other call number		
	4	ABC Architectuurcentrum
	1	ABC Architectuurcentrum Haarlem
	1	abc art berlin contemporary (2009)
		ABC Australia. See: Australian Broadcasting Corporation
		ABC (Brazil). See: Academia Brasileira de Ciências
	2	ABC Canada
	1	ABC Circle Films

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Browse : Setup in Alma

226 primo_publishing_heading_enrichment system true Is primo publishing heading

Content Options

- Electronic
- Physical
- Digital
- Collection
- Course information enrichment
- Related records information enrichment
- Linked Data enrichment
- Headings enrichment 
- Heading enrichment – enrich with "See Also" fields

Re-publish to Primo

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Setup in Primo

- Alma MARC Template support Browse
 - Browse section
 - Suppression of non-preferred in exported records

Course Reserves

- Generally set up as a separate search scope/tab
- Facets per course name, instructor, department
- Search indexes per course name, instructor, department
- [Example](#)

Setting up Course Reserves - Alma

- CR data must be enabled in the Primo Publishing Profile
- CNO includes:
 - \$\$b – Start date
 - \$\$c – End date
 - \$\$e – Department name
 - \$\$f – Department code
 - \$\$g – Course instructors
 - \$\$j – Course name
 - \$\$k – Course code and section
 - \$\$l – Academic department
 - \$\$o – Searchable IDs
 - *Note: CNO field is published for active courses only. Alma process 'Activate/Deactivate Courses' must run daily in order to activate and deactivate courses. Should be enabled by the customer.*

Setting up Course Reserves – Primo

- Alma MARC Template – includes rules for adding:
 - Display – Course Reserves Info
 - Facets – Course ID/Name, instructor, department
 - Search - Course ID/Name, instructor, department
- Add search scope for Course reserves
 - <institution code>_CR added in OTB rules. Needs to be defined as a scope value
- Add search scope and tab with Course facets/indexes to your view

Course Reserves – “CR_RESTRICTED”

- Records that are cataloged specifically for course reserves can be tagged as being “CR_RESTRICTED”
- This tag will be added to the local field defined in Resource Management -> Resource Configuration -> Configuration Menu -> Other Settings

The screenshot shows the 'Resource Information' screen. In the 'Edition' section, there is a table with three columns: 'Local Field', 'Repository', and 'Value'. The first row has 'course_restricted_bib_data_w' in the Local Field column, 'repository' in the Repository column, and 'false' in the Value column. The second row has 'course_restricted_field' in the Local Field column, 'repository' in the Repository column, and '999\$a' in the Value column. The third row has 'marc_holding_in_use' in the Local Field column, 'repository' in the Repository column, and 'true' in the Value column. A red box highlights the 'course_restricted_field' row. At the bottom of the screen, there is a checkbox labeled 'Course Restricted' which is checked, and a red box highlights this checkbox.

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CR_RESTRICTED in Primo

- Used to create a “Restricted Search Scope” and limit discovery to registered users (on campus or signed-in)
 - Define scope as being “Restricted Search”
 - Define scope in Search/Restricted Search Scope
 - Define allowed users in Restricted Search definitions
- Can be used to prevent these records from being discovered in main institution scope
 - Add a condition to main institution scope (or create a new one)
 - False / CNO exists
 - AND
 - False / <local field>=“CR_RESTRICTED”

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Linked Records?

- Typical examples from traditional library resources:
 - Earlier/later title for journals (tags 780/785)
 - Analytics – parts of a whole (tags 773/774)
- [Example \(Manchester\)](#)

Linking Data in Records Harvested from Alma

- Links in Alma are created based on MARC data
- A daily job creates a table of relationships from the data – using the MSS ID as link
 - For example
 - 773 / 774 - PART_OF / CONTAINS

Linking Data in Records Harvested from Alma

- PLK – created for export to Primo:
 - \$a type
 - \$b MMS
- To include PLK fields the option “Related Records information” must be checked in the Primo Publishing Profile

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Alma - Tasks Analytics Currently at TC Wilson Library Serials ... Help Implementer, Ex Libris Cancel Save

Publishing Profile Details

The Run full publishing option should not be selected after "go live" without prior written consent from third-line Support staff.

The predefined Electronic, Physical, and Digital options in the Content Options section should not be modified.

Profile Details

Profile name: **Biblio records to Primo**
 Profile description: Setup the parameters for publishing bibliographic records to Primo

Run full publishing:

Status: Active Inactive
 Scheduling: Every 6 hours, starting at 05:00 Email Notifications

Submission Format

FTP configuration: Primo production Sub-directory:

Content Options

Electronic:
 Physical:
 Digital:
 Collection:
 Course information enrichment:
 Related records information enrichment:

Physical Inventory Enrichment

Quick Add: Holding Tag, Holding Subfield, Bib Tag, Bib Subfield
 Add

Holding Tag	Holding Subfield	Bib Tag	Bib Subfield
1 856	z	956	z

Cancel Save

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In Primo

- Create links using the lds30-39/lsr30-30 fields
- Works same as other lateral links (author, title):
 - Content displayed – is searched in parallel index. For example:
 - display/lds30 <record ID>
 - Searches for <record ID> in the search/lsr30 index

Using lds30-9/lsr30-9: Setup

- Documentation:
 - Technical Guide > Additional Configurations > Creating Lateral Links for Local Fields
- Setup:
 - Search Engine Configuration – Results Threshold – Number of active local fields in search section
 - Increase and deploy Search Engine Configuration

What can be done?

- Link based in MMS ID of parent; direction determined by prefix

Field	Parent	Child
Source	001 = MMS of parent PLK/s \$aPart of \$b<child MSS>	001=MMS of child PLK \$acontains \$b<parent MSS>
lds31	DN<MSS of parent> Take MSS of parent from 001 if PLK \$a="part of"	
lds32		UP <MSS of parent> Take MSS of parent from PLK \$b if PLK \$a="contains"
lsr31		DN <MSS of parent> Take MSS of parent from PLK \$b if PLK="contains"
lsr32	UP <MSS of parent> Take MSS of parent from 001 if PLK \$a="part of"	

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Source Parent Record

```

<controlfield tag="001">9910239404401631</controlfield>
<datafield tag="245" ind1="1" ind2="0">
  <subfield code="a">Twayne's United States authors
  series.</subfield>
<datafield tag="PLK" ind1="" ind2="">
  <subfield code="a">Part Of.</subfield>
  <subfield code="b">9916538754401631</subfield>
</datafield>
- <datafield tag="PLK" ind1="" ind2="">
  <subfield code="a">Part Of.</subfield>
  <subfield code="b">992636914401631</subfield>
</datafield>
And many more PLK...

```

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Source Child Record

```
<controlfield tag="001">9916507164401631</controlfield>
<datafield tag="245" ind1="1" ind2="0">
<subfield code="a">Henry Miller /</subfield>
<datafield tag="PLK" ind1="" ind2="">
<subfield code="a">Contains.</subfield>
<subfield code="b">9910239404401631</subfield>
</datafield>
```

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PNX Parent Record

```
<title>Twayne's United States authors series.SERIES.</title>
<lds31>DN9910239404401631</lds31>
<lsr32>UP9910239404401631</lsr32>
```

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Child PNX Record

```
<title>Henry Miller / by Kingsley Widmer.</title>
<lds29>9916507164401631</lds29>
<lds32>UP9910239404401631</lds32>
<lsr31>DN9910239404401631</lsr31>
```

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Comments: LS - Added 20140207, changed 20140221 - PLK Mechanism - This is the MMS ID of the record. There may be multiple 001s, so we check the final 4 characters are "1631" and store only one.

Version: 1 [Go to bottom of page](#)

Rule group: display_lds29

Type	Field	Ind1	Ind2	Subfield
MARC	001			Include

Enabled

Conditions logic: True

Condition 1 - Logic: True

Type	Field	Ind1	Ind2	Subfield	Success If
MARC	001			Include	Match Current

Condition1 - Routines:

General Parameter	Parameter
Routine: Take characters from the end	4
Routine: Check string equals string	1631

Transformations:

Transformation	Parameter
Copy As Is	

Action: OR

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Rule group display_ids31

Type	Value						
Source	PNX	display/ids29	<input checked="" type="checkbox"/> Enabled				
Conditions logic							
Conditions	True						
Condition 1 - Logic	True						
Condition 1 - Source	Type	Field	Ind1	Ind2	Subfield	Success If	
	MARC	PLK			Include	a	Match Any
Condition 1 - Routines	General Parameter						
	Routine		Parameter				
	Upper Case		PART OF...				
	Check string equals string						
Transformations							
Transformation	Parameter						
Add to beginning of string	DN						
Behavior							
Action	ADD						

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Rule group display_ids32

Type	Field	Ind1	Ind2	Subfield			
Source	MARC	PLK			Include	b	<input checked="" type="checkbox"/> Enabled
Conditions logic							
Conditions	True						
Condition 1 - Logic	True						
Condition 1 - Source	Type	Field	Ind1	Ind2	Subfield	Success If	
	MARC	PLK			Include	a	Match Current
Condition 1 - Routines	General Parameter						
	Routine		Parameter				
	Upper Case		CONTAINS...				
	Check string equals string						
Transformations							
Transformation	Parameter						
Add to beginning of string	UP						
Behavior							
Action	ADD						

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Rule group search_ls31

Type	Field	Ind1	Ind2	Subfield	
Source	MARC	PLK			Include <input checked="" type="checkbox"/> b <input checked="" type="checkbox"/> Enabled

Conditions logic

Conditions True

Condition 1 - Logic True

Condition 1 - Source Type	Field	Ind1	Ind2	Subfield	Success If
MARC	PLK			Include <input checked="" type="checkbox"/> a	Match Any <input checked="" type="checkbox"/>

Condition 1 - Routines

General Parameter	Parameter
<input type="text"/>	<input type="text"/>
Routine	Parameter
Upper Case <input checked="" type="checkbox"/>	<input type="text"/>
Check string equals string <input checked="" type="checkbox"/>	CONTAINS <input checked="" type="checkbox"/>

transformations

Transformation Parameter

Add to beginning of string DN

Behavior

Action ADD

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Rule group search_ls32

Type	Value		
Source	PNX	display/lds29	<input checked="" type="checkbox"/> Enabled

Conditions logic

Conditions True

Condition 1 - Logic True

Condition 1 - Source Type	Field	Ind1	Ind2	Subfield	Success If
MARC	PLK			Include <input checked="" type="checkbox"/> a	Match Current <input checked="" type="checkbox"/>

Condition 1 - Routines

General Parameter	Parameter
<input type="text"/>	<input type="text"/>
Routine	Parameter
Upper Case <input checked="" type="checkbox"/>	<input type="text"/>
Check that string exists <input checked="" type="checkbox"/>	PART OF <input checked="" type="checkbox"/>

Transformations

Transformation Parameter

Add to beginning of string UP

Behavior

Action ADD

[Go to top of page](#)

[Create new source mapping](#)

[Create](#) [Go Back](#) [Save](#)

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Collection Discovery

- [Demo](#)

The screenshot shows a grid of nine digital collection cards:

- Harvard theses and dissertations**: A collection of Harvard theses. View collection.
- Van Gogh Digitized Paintings**: Collection of Van Gogh paintings. View collection.
- Washington State University Research Exchange**: Research Exchange is L... View collection.
- ILO - a collection of ILO publications**: The International Labour Organization publications. View collection.
- Digital Items**: A collection of mixed digital items. View collection.
- European Libraries**: Pictures of European Libraries. View collection.
- History Collection**: A collection of historical documents. View collection.
- Art Collection**: Art Collection. View collection.
- Foods of Taiwan as seen by tourists**: Foods of Taiwan as seen by tourists. View collection.

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Setting up Collection Discovery

- http://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Back_Office_Guide/060Configuring_Primo%E2%80%99s_Front_End/050Collection_Discovery

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Support Resources



Support Resources

- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Alma-Primo_Integration](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Alma-Primo_Integration)
- Primo Users Listserv

Q & A

Any Questions?



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Session Survey Evaluation

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[https://www.surveymonkey.com/r/tec
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