



Alma Primo Interoperability

For consortium

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a ProQuest Company

Objectives

By the end of this session you will understand:

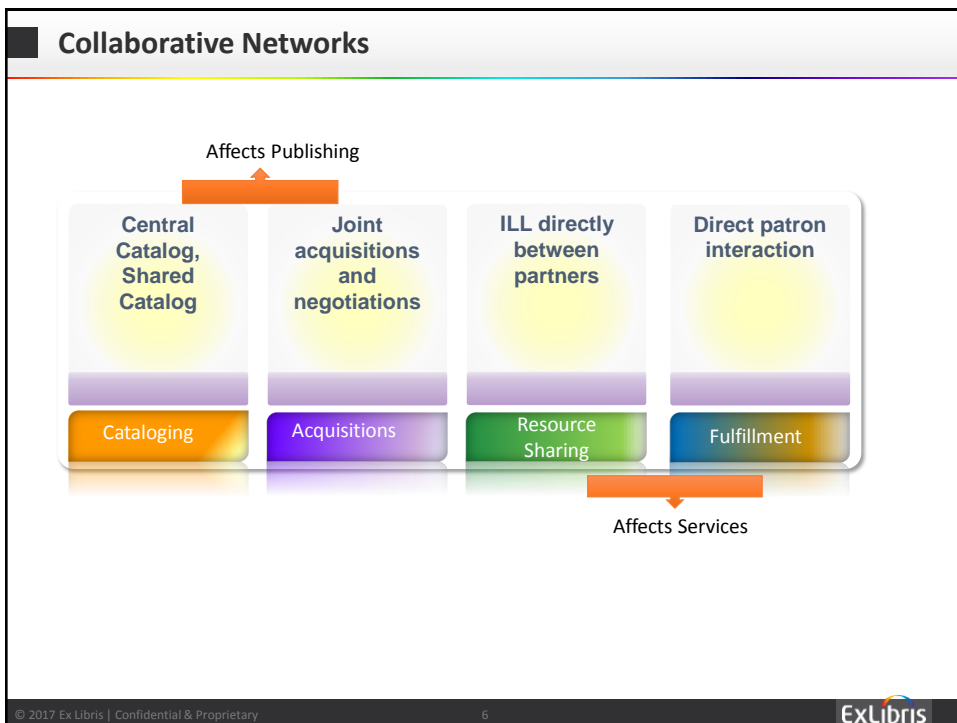
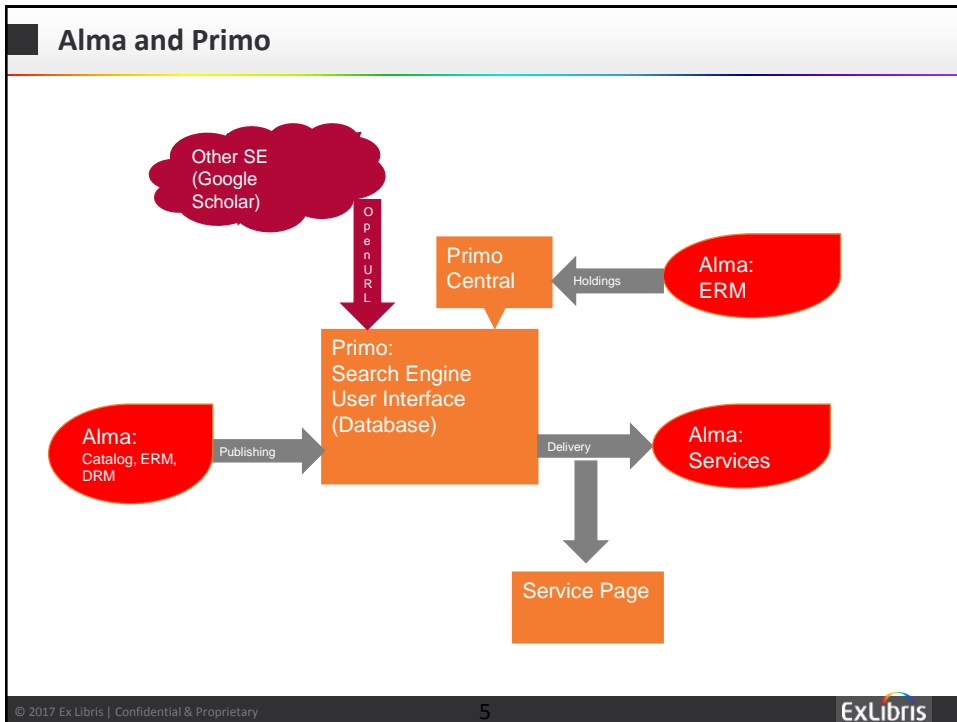
- The main aspects of Alma-Primo interoperability within the context of an Alma/Primo consortium
 - Publishing
 - Delivery
 - Alma as Link Resolver/ERM
- How to setup Alma for Primo / Primo for Alma

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

- Overall view
- Alma consortial topologies
- Basics : setting up the Primo view



Alma/Primo Topology - Collaborative Networks

Alma	Primo
<ul style="list-style-type: none"> Multiple Alma institutions – no Network Zone Have a Fulfilment Network and/or want a Union Catalog and/or 'search other institution' 	<ul style="list-style-type: none"> Primo institution per Alma institution. Each institution will manage their own data. Every institution will have its own view / a central view is also possible. May dedup across-institutions Will likely have shared scopes
<ul style="list-style-type: none"> Multiple Alma institutions with Network Zone 	<ul style="list-style-type: none"> Primo institution per Alma institution Shared management of data – single feed from Alma Every institution will have its own view / a central view is also possible. Will likely have shared scopes

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Alma-Primo Basics

- [Configuring the Primo Institution – documentation](#)
- [Configuring the Primo institution – example](#)

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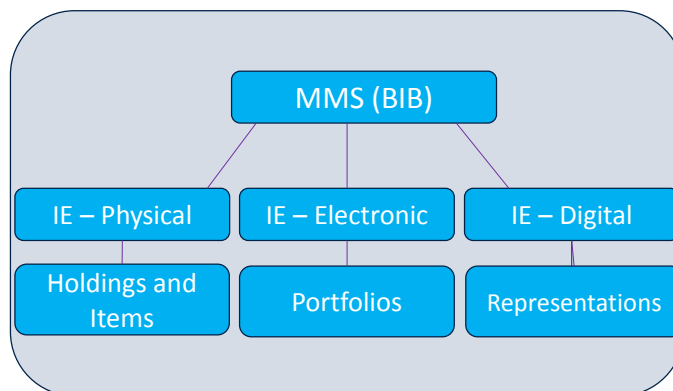
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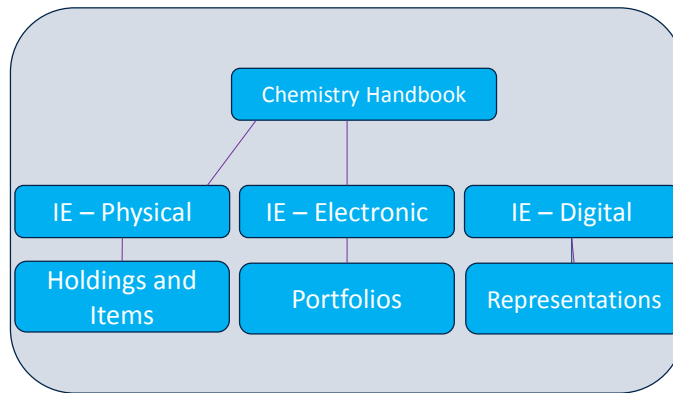
Alma-Primo : Publishing

- Alma record structure → Primo /with & without NZ
- The publishing process / with & without NZ
- Suppressing records
- Key fields in published Alma record
- Key fields in normalizing to the PNX
- Deduping Alma records in Primo

Alma Data Structure: Institution Zone



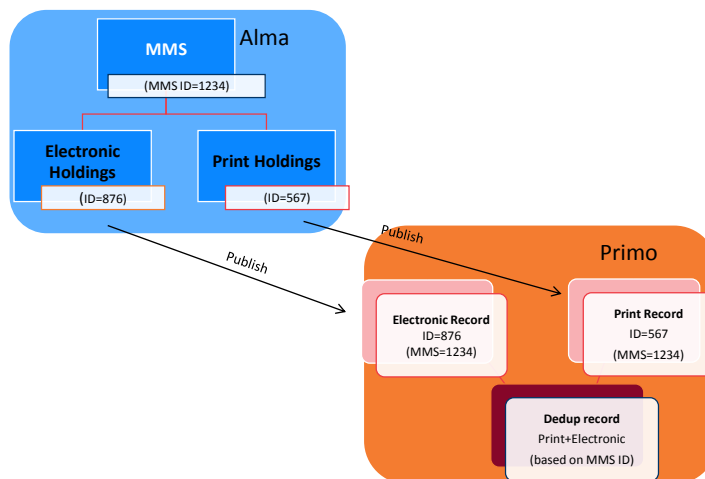
Alma Data Structure: Institution Zone



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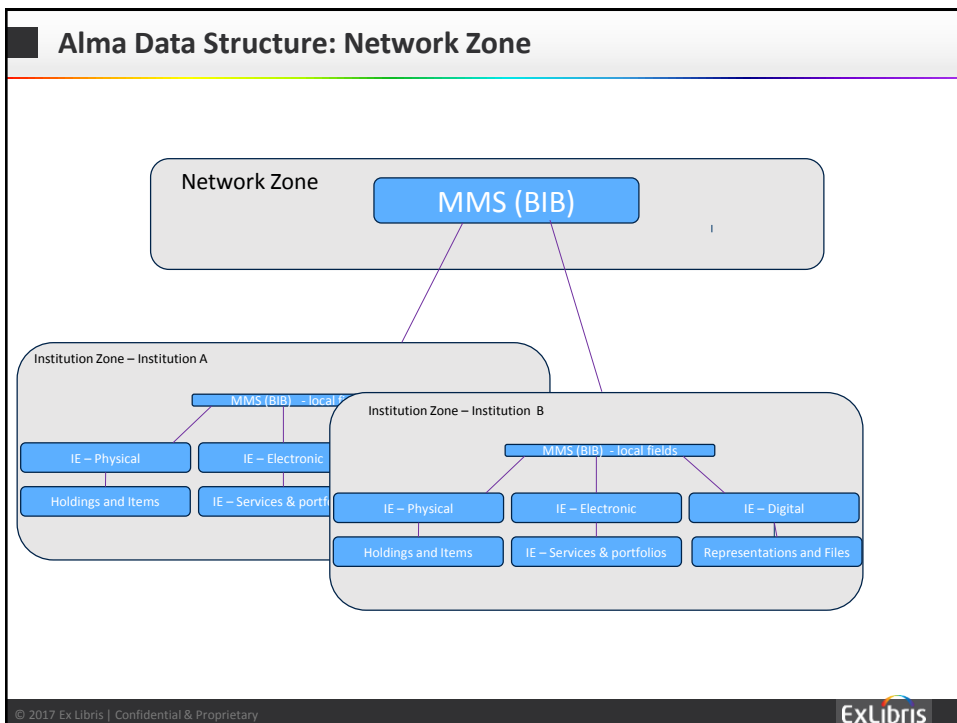
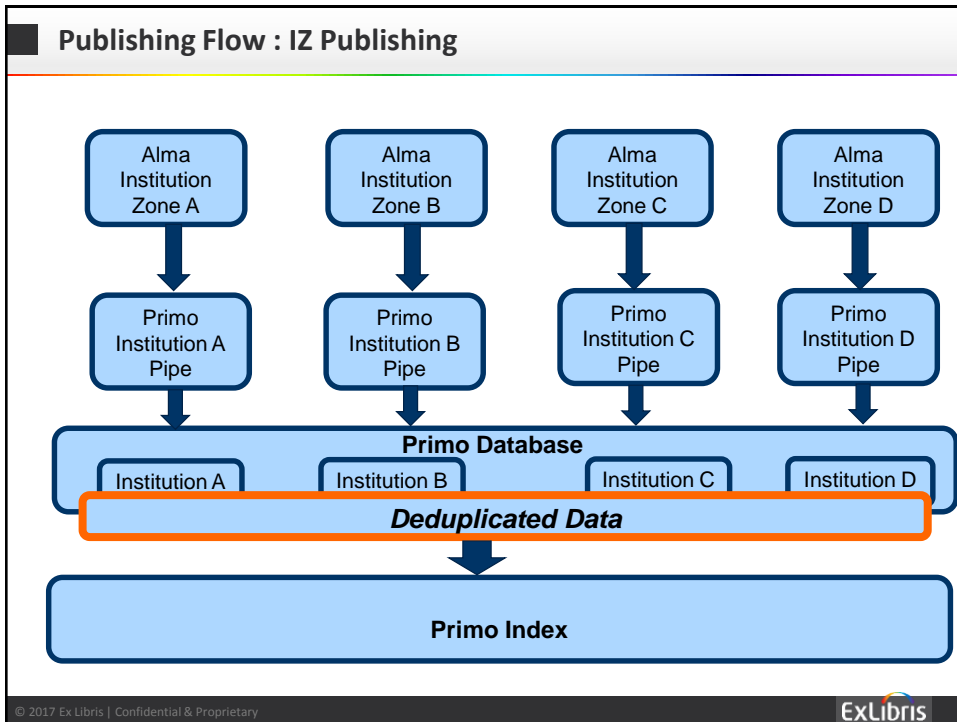
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Alma Publishing to Primo : at the IE level

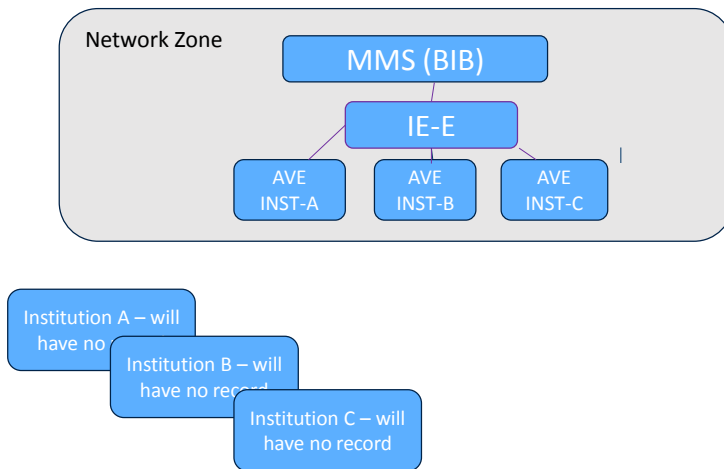


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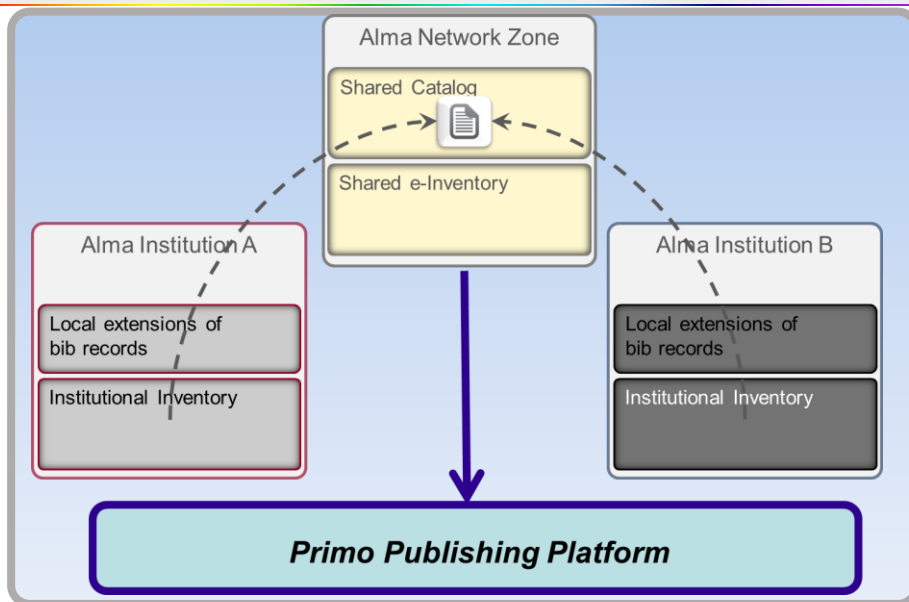
Alma Data Structure: Shared Acquisitions of E



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Centralized Publishing



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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 issues. Please contact your Primo administrator for more information 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 ☐

Status ☒ Active ☐ Inactive

Scheduling Every 6 hours, starting at 01:00

Email Notifications

Submission Format

FTP configuration

Sub-directory Primo Automation/QAC01

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 ☒

Physical Inventory Enrichment

Quick Add

Holding Tag Holding Subfield Bib Tag Bib Subfield

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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 Publishing interface. At the top, there's a header with 'Alma - GA' and a search bar. Below it, a 'Run a Job - Select Job to Run' button is visible. The main area contains a table with columns: 'Type', 'Name', 'Description', 'Content Type', and 'Type'. The table lists three publishing sets:

Type	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

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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 'Templates' sidebar with a 'Records' section. The main area displays a table of records with columns: 'File', 'Edit', 'Tools', and 'Help'. A context menu is open over the 'Tools' column, showing options like 'Search External Resources', 'View Versions', 'Validity Check', 'View Inventory', 'Marc21 Bib', 'Holding', 'Dublin Core', 'Marc21 Auth', and 'Set Management Tags'. The 'Set Management Tags' option is highlighted, and a sub-menu is visible with options: 'Suppress from Discovery' (checked), 'Export to OCLC', and 'Brief?'.

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Suppress Records from Publishing

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

Holdings Configurations

Accession Placement: Call Number Type:

Suppress from Externalization: ☒

- Suppress Print inventory with specific process status

You are configuring: University of Minnesota [Organization Unit List](#)

Table Information

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	Last Updated
<input checked="" type="checkbox"/>	Acquisition	True	Ex Libris	22/04/2013
<input checked="" type="checkbox"/>	Claimed Returned	True	Ex Libris	22/04/2013

Create a New Mapping Row

Process Type: Exclude:

[Add Row](#)

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Suppress Records from Publishing

- Job: Suppress BIB records from Discovery

ExLibris Alma - GA

Tasks Analytics Currently at: Main Library - Main Library...

Run a Job - Select Job to Run

Type: Marc 21 Bib normalization Source type: All Find: in: Description 1 - 11 of 11 Task Chains Columns To

	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 (OCLC)	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 record 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 990 copied from worldcat	Add 990 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

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Publishing in Primo

- Data source
 - IZ publishing – one per Alma institution
 - Centralized publishing – single data source
- 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

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 : IZ vs Centralized Publishing

Field	IZ publishing	Centralized publishing
Record ID (in header) This becomes the basis for the PNx record ID	IE of inventory	IE of NZ
MMS	Included in 001	Added to MMS field Per institution
Institution	INST	INST \$\$a
Inventory type	INT	INST \$\$b (INST \$\$c= IE of institution)
Local field		Institution added to \$\$A

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Key Fields

- 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

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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	avallibrary	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

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	
<ul style="list-style-type: none"> • IZ publishing • Centralized Publishing 	

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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
)$S$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>

```

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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>

```

Centralized Publishing Published Record

```

<controlfield tag="001">99164820300001451</controlfield>
<datafield tag="INST" ind1=" " ind2=" ">
<subfield code="a">01ALLIANCE_NETWORK</subfield>
<subfield code="b">P</subfield><subfield code="c">71167879300001451</subfield></datafield>
<datafield tag="INST" ind1=" " ind2=" ">
<subfield code="a">01ALLIANCE_EWU</subfield>
<subfield code="b">P</subfield>
<subfield code="c">2198007380001843</subfield></datafield>
<datafield tag="AVA" ind1=" " ind2=" ">
<subfield code="0">99115243520101843</subfield>
<subfield code="a">01ALLIANCE_EWU</subfield>
<subfield code="b">JFK</subfield>
<subfield code="c">Upper Level Book Stacks</subfield>
<subfield code="d">E178 .A535</subfield>
<subfield code="e">available</subfield>
<subfield code="f">2</subfield>
<subfield code="g">0</subfield>
<subfield code="j">ejs</subfield>
<subfield code="k">0</subfield>
<subfield code="p">1</subfield></datafield>
<datafield tag="AVA" ind1=" " ind2=" ">
<.....
<datafield tag="MMS" ind1=" " ind2=" ">
<subfield code="b">99164820300001451</subfield>
<subfield code="a">01ALLIANCE_NETWORK</subfield></datafield>
<datafield tag="MMS" ind1=" " ind2=" ">
<subfield code="b">99115243520101843</subfield>
<subfield code="a">01ALLIANCE_EWU</subfield></datafield>
<datafield tag="946" ind1=" " ind2=" ">
<subfield code="a">MARS</subfield>
<subfield code="g">local</subfield>
<subfield code="A">01ALLIANCE_EWU</subfield></datafield>

```

Centralized Publishing - PNX

```

<control>
<sourcerecordid>71167879300001451</sourcerecordid>
<sourceid>CP</sourceid>
<recordid>CP71167879300001451</recordid>
<originalsourceid>01ALLIANCE_NZ</originalsourceid>
<sourceformat>MARC21</sourceformat>
<sourcesystem>Alma</sourcesystem>
<almaid>01ALLIANCE_NETWORK:71167879300001451</almaid>
<almaid>01ALLIANCE_EWU:2198007380001843</almaid>
</control>
<display>
<avallibrary>$$IEWU$$LEWU_JFK$$1Upper Level Book Stacks$$2(E178 .A535
)$S$Savailable$$X01ALLIANCE_EWU$$YJFK$$Zejs</avallibrary>
<avallibrary>$$IPSU$$LPSU_MILLAR$$1Offsite$$2(Z1236 .A51357
)$S$Savailable$$X01ALLIANCE_PSU$$YMILLAR$$ZPANXRQ</avallibrary>
<availinstitution>$$IPSU$$Savailable</availinstitution>
<availinstitution>$$IWWU$$Savailable</availinstitution>

```

Centralized Publishing - PNX

```

<search>
<searchscope>AZNZ</searchscope>
<searchscope>AZEWU</searchscope>
<searchscope>AZPDS</searchscope>
<searchscope>AZUID</searchscope>
<searchscope>AZUW</searchscope>
<delivery>
<institution>NZ</institution>
<institution>EWU</institution>
<institution>PSU</institution>
<institution>UID</institution>
<institution>UW</institution>
<delcategory>Alma-P$$INZ</delcategory>
<delcategory>Alma-P$$IEWU</delcategory>
<delcategory>Alma-P$$IPSU</delcategory>
<delcategory>Alma-P$$IUID</delcategory>
<delcategory>Alma-P$$IUW</delcategory>
</delivery>

```



Alma – Primo : Delivery

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

Delivery in Consortia – Points to consider

- Cross-institution dedup can result in records with mixed institution inventory.
 - Do we take this inventory into account?
- Institutions can search each other's records.
 - What kind of delivery can be offered if the institution itself has no inventory at all?
- What is the “active” institution?
 - For P (Get It) → directed to the owner of the inventory. Initial request always to institution of the view
 - For E (View It) → directed to the institution of the user
 - For D (View It) → directed to the owner of the inventory.
 - May change with the new “Shared-D” option

Some Key Flags

Flag	Configured in	Description	Note
Always Prefer Online Resources in Multi-Institution Records	General Configuration	If institution has P inventory – take electronic inventory of other institutions in account?	If set to “Y” you probably also need to set up restricted delivery scopes
Shared User Database & Resource sharing	General Configuration	This means that users can place requests in other institutions It also means that if the institution only has electronic inventory, the P inventory of other institutions will be taken into account	
Sort by locations by user institution / Include only locations of the view	View Wizard	Display/do not display locations from other institutions	

> Edit Locations Details Attributes

View : LIBAR

Title : Locations

Real Time Availability

☐ None☒ Brief and Full Results☐ Full Results only☒ Sort locations by user institution☐ Include only locations belonging to the institution of the view☒ Display Item list filters☐ All filters☒ Locations Only

Alma Collaborative Networks : Resource Sharing

- Description: Users always request from their home libraries
- Setup in Primo:
 - Shared scopes
 - Inventory from other institutions is suppressed
- Flags:
 - Always Prefer Online Resources in Multi-Institution Records → N
 - Shared User Database & Resource sharing → N
 - Locations → Include only locations of the view

Alma Collaborative Networks : Fulfilment Network

- Description: Users request from owning institution directly
- Setup in Primo:
 - Shared scopes
 - Inventory from other institutions is not suppressed
- Flags:
 - Always Prefer Online Resources in Multi-Institution Records → Y
 - Shared User Database & Resource sharing → Y
 - Locations → Sort by user institution

Alma Delivery

Alma Services

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

[Demo](#)

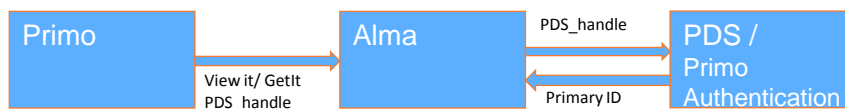
[Demo Classic UI](#)

[Leuven](#) (Fulfillment Network) Query: Outline of American history

[Alliance](#) (Resource Sharing Network)

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 status
 - Every delivery category will be assigned a Get It 1
 - In consortium member inventory is taken into account
- 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 – relative to institution of the view
 - If at least one AVA = “available” → available_in_maininstitution
 - If at least one AVA = check_holdings” → check_holdings_in_maininstitution
 - If unavailable
 - “unavailable_in_maininstitution_more” → member institutions have holdings
 - “unavailable_in_maininstitution_nomore” → members do not have holdings
 - If does not exist → does_not_exist_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”
- Can be used in the following scenarios:
 - Shared scopes include “E” inventory from member institutions
 - View It will not offer services except for GES.
 - Based on availability status “Restricted” GetIt1 can be changed to “Get It”
 - [Example \(BIBSYS\)](#)
 - For D inventory with access restrictions. From main institution or member institutions.

Fulfilment Networks – What is Required?

- In Alma:
 - Define fulfilment network and policies
- In Primo:
 - Dedup across institutions
 - Create shared scopes
 - Users can access Get It of member institutions

Fulfilment Network : My Account

- Display all My Account info for all institutions

e-Shelf Queries My Account						
<div> Open University Alma University Loans (5) Requests (7) Fine & Fees (1) Blocks & Messages Personal Settings University of Knowledge </div>						
<div> List of Active Loans List of Historic Loans </div>						
		Renew All Renew Selected		Due Date	Due Hour	Potential Fine
#	Title	Author				
1	<input type="checkbox"/> Harmonica classics			05/07/2015	21:00	
2	<input type="checkbox"/> A practical handbook of medical chemistry /	Bowman, John E.		04/29/2015	21:00	
3	<input type="checkbox"/> Libraries and library science - a design manual	Bodine, Jethro		04/28/2015	20:00	
4	<input type="checkbox"/> Sonata in E for trombone and piano.	Sanders, Robert L.,		04/24/2015	21:00	
5	<input type="checkbox"/> The Ultimate Harry Potter and Philosophy			04/22/2015	21:00	

Fulfilment Network: My Account - Configuration


- By default Alma creates a user in the member institution (i.e. not the user's home institution) when the user accesses Get It for a member institution
- Customer Parameter: uresolver_remote_register
 - Fulfilment Configuration → General → Other settings. Values:
 - Auto – always created. Default
 - None – user not created at all
 - Manual – user must indicate he wants to create a user in member institution
 - Must be defined in the member institution – not the home institution

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Manually Linked Patrons

1 Results for Alma University Sorted by: Rel

 **Behind the iron curtain.**
Karol. Poddebski Hilaire Belloc: 1870-1953, former owner. 1945

Check holdings

[Get It](#) [Details](#) [More\(1\)](#)

Open University

Request Options:

For request options Register to Open University

Location: Central Library General

Availability: (1 copy, 1 available, 0 requests)

Barcode: CUJ54 Type: Book Policy: Loanable

1 - 1 of 1 Records

Description

1 Results for Alma University Sorted by: Rel

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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

- | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • View it and Get It skins • Labels • Display Logic • General Electronic Services • Physical inventory <ul style="list-style-type: none"> • Holdings record display • Location priority • Item sort routines | <ul style="list-style-type: none"> • Electronic inventory <ul style="list-style-type: none"> • Order of services • Direct Linking • Related Services • License display • Digital inventory <ul style="list-style-type: none"> • Max number of representations |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

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

Labels

- Fulfilment Configuration → Discovery Interface Display Logic → Labels

Display Logic

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

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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](#)

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

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	Enrollment date:	07/04/2012 09:43 AM
Institution name:	EXLDEV1_INST	Enrollment date:	07/04/2012 09:43 AM

Client Attributes [Learn More](#)

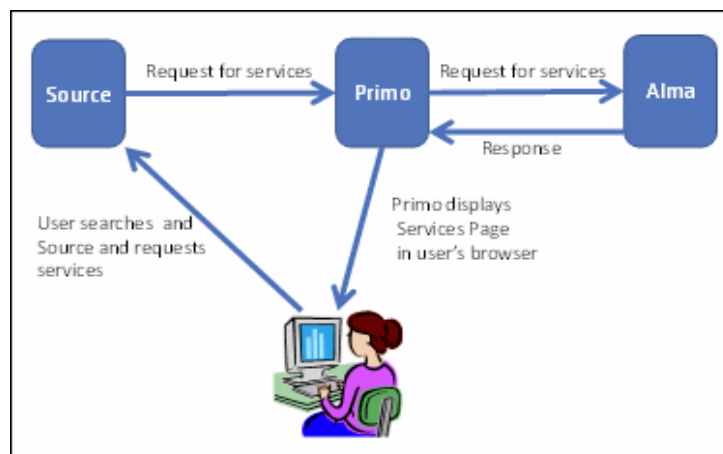
Client name:	PRIMO
Client UID:	MarinaS.EXLDEV1_INST.PPRD
Registered application:	Primo
Environment type:	Production
FE1 host name and port:	demo.alma.exlibrisgroup.com:1701
SFX institutional holdings file URL:	http://demo.alma.exlibrisgroup.com/rep/getFile?institution_code=EXLDEV1_INST&file=institutional_holding
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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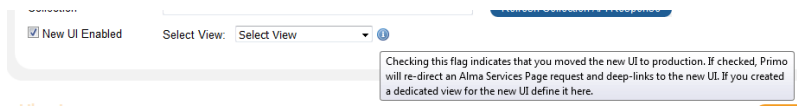
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Example

- [Example](#)

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 Primo. On the left, there is a checkbox labeled "New UI Enabled" which is checked. To its right is a dropdown menu labeled "Select View:" with the text "Select View" inside. A blue information icon is next to the dropdown. A tooltip box is visible, containing the 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."

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

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



Alma-Primo : Some additional interoperability points

- Browse
- Course Reserves
- Linking Records
- Collection Discovery

Browse

Select the list to browse

Author

Title

Subject

Library of Congress call number

NLM call number

Dewey call number

SUDOC call number

Other call number

Simple Search

Advanced Search

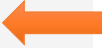
browse "ABC" in author list

No. of records	Entry
	ABC. See: Africa Bibliographic Centre , Wydawnictwo ABC , African Bibliographic Center
1	ABC (A Better Chance)
	ABC, active 17th century. See: A. B. C., active 17th century
	ABC, active 19th century. See: A. B. C., active 19th century
	ABC (American Botanical Council). See: American Botanical Council
	ABC (Anarchist Black Cross). See: Anarchist Black Cross
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

Browse : Setup in Alma

226	primo_publishing_heading_enrichment	System	true	Is primo publishing heading enrichment
-----	-------------------------------------	--------	------	----------------------------------------

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 supports Browse
 - Browse section
 - Suppression of non-preferred in exported records

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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 \$\$I with the institution to prevent cross-institution display
- 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

Resource Information

Title * Europe in 19th Century

Author

Publisher

Year

Edition

ISBN

Place of Publication

Additional Person Name

Call Number

Note

Chapter

Pages

course_restricted_bib_data_w	repository	false
course_restricted_field	repository	999\$\$a
marc_holding_in_use	repository	true

Course Restricted ☒

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”

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

Alma | Tasks | Analytics | Currently at TC Wilson Library Serials <... | Help | Implementer: Ex Libris

Publishing Profile Details [Cancel] [Save]

ⓘ 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 * Publish bibliographic 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	Delete
806	2	806	2	

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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

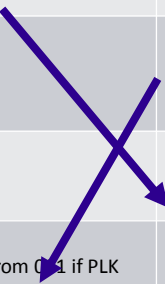
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What can be done?

- 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...

```

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>

```

PNX Parent Record

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

Child PNX Record

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

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_ids29

Source Type: MARC Field: 001 Ind1: Ind2: Subfield: Include Enabled

Conditions logic

Conditions True

Condition 1 - Logic True

Condition 1 - Source Type: MARC Field: 001 Ind1: Ind2: Subfield: Include Success If: Match Current

Condition1 - Routines

General Parameter

Routine

Take characters from the end 4

Check string equals string 1631

Transformations

Transformation Copy As Is **Parameter**

Behavior

Action OR

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Rule group display_ids31

Source Type: PNX Value: display_ids29 Enabled

Conditions logic

Conditions True

Condition 1 - Logic True

Condition 1 - Source Type: MARC Field: PLK Ind1: Ind2: Subfield: Include Success If: Match Any

Condition1 - Routines

General Parameter

Routine

Upper Case

Check string equals string

Parameter

PART OF:

Transformations

Transformation Add to beginning of string **Parameter** DN

Behavior

Action ADD

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Rule group

Source Type: Field: Ind1: Ind2: Subfield: ☒ Enabled

Conditions logic:

Conditions

Condition 1 - Logic

Condition 1 - Source Type: Field: Ind1: Ind2: Subfield: Success If:

Condition1 - Routines

General Parameter

Routine

Parameter

Transformations

Transformation **Parameter**

Behavior

[Go to top of page](#)

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Rule group

Source Type: Field: Ind1: Ind2: Subfield: ☒ Enabled

Conditions logic:

Conditions

Condition 1 - Logic

Condition 1 - Source Type: Field: Ind1: Ind2: Subfield: Success If:

Condition1 - Routines

General Parameter

Routine

Parameter

Transformations

Transformation **Parameter**

Behavior

[Go to top of page](#)

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Rule group: search_lsr32

Type: Value

Source: PNK display/lds29 ☒ Enabled

Conditions logic: True

Condition 1 - Logic: True

Condition 1 - Source: Type: MARC Field: PLK Ind1: Ind2: Subfield: Include: a Success If: Match Current

Condition1 - Routines: General Parameter

Routine: Upper Case Parameter: Check that string exists PART OF

Transformations:

Transformation: Add to beginning of string Parameter: UP Behavior: Action: ADD

[Go to top of page](#)

Create new source mapping

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

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Collection Discovery

- [Demo](#)



Setting up Collection Discovery

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

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?





Session Survey Evaluation

Please use provide feedback on this session:

<https://www.surveymonkey.com/r/techsem2017>

