Alma Primo Interoperability

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

© 2017 Ex Libris | Confidential & Proprietary

ExLibris

Agenda

1. Alma and Primo – the big picture
2. Publishing
3. Delivery
4. Alma as Link Resolver / ERM
5. And some more

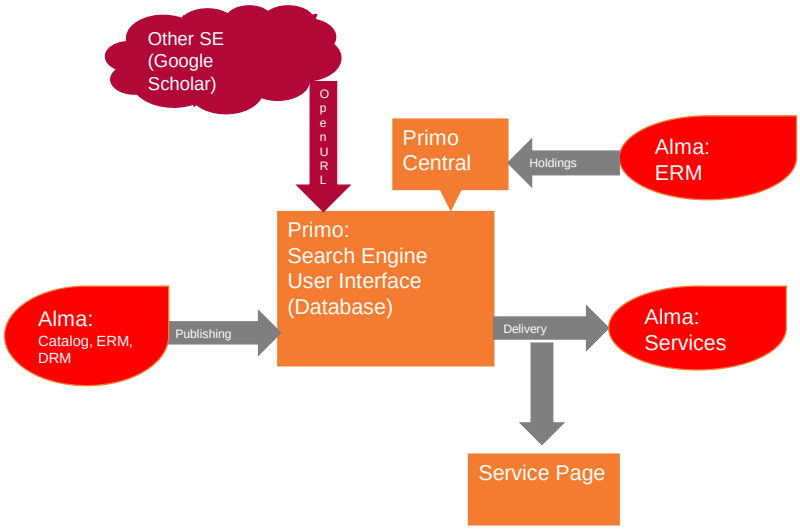
© 2017 Ex Libris | Confidential & Proprietary

Alma and Primo – the big picture

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

© 2017 Ex Libris | Confidential & Proprietary

Alma and Primo



© 2017 Ex Libris | Confidential & Proprietary

ExLibris

Collaborative Networks

© 2017 Ex Libris | Confidential & Proprietary

ExLibris

Alma/Primo Topology - Collaborative Networks

Alma	Primo
• Multiple Alma institutions – no Network Zone • Have a Fulfilment Network and/or want a Union Catalog and/or 'search other institution'	• 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
• Multiple Alma institutions with Network Zone	• 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

© 2017 Ex Libris | Confidential & Proprietary

Alma-Primo Basics

- Configuring the Primo Institution – documentation
- Configuring the Primo institution – example

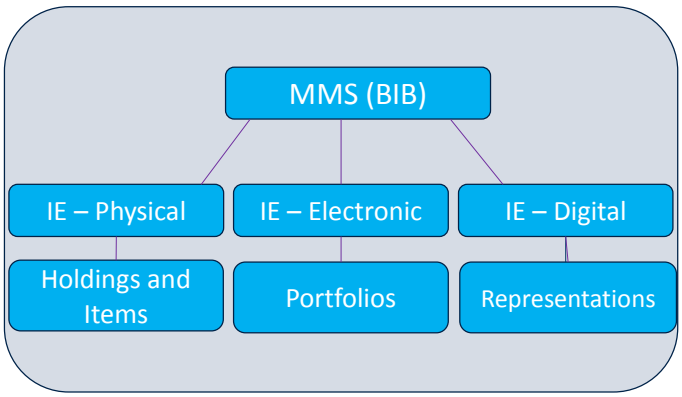
© 2017 Ex Libris | Confidential & Proprietary

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

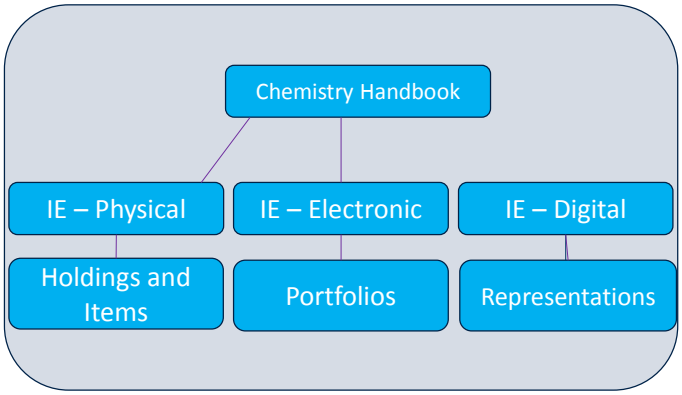
© 2017 Ex Libris | Confidential & Proprietary

Alma Data Structure: Institution Zone



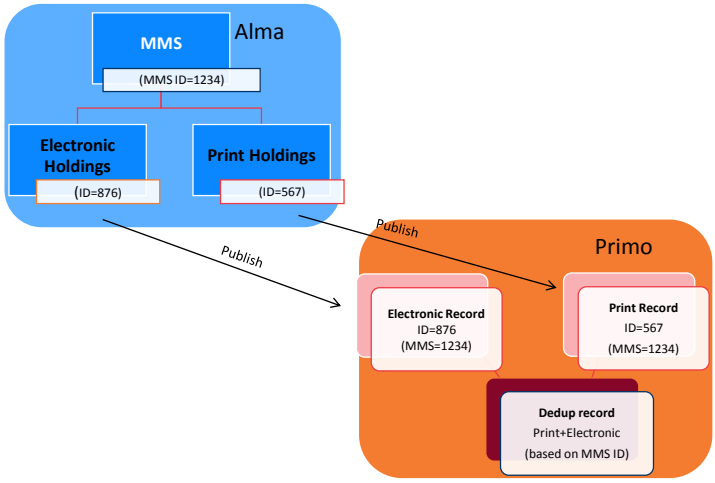
© 2017 Ex Libris | Confidential & Proprietary

Alma Data Structure: Institution Zone



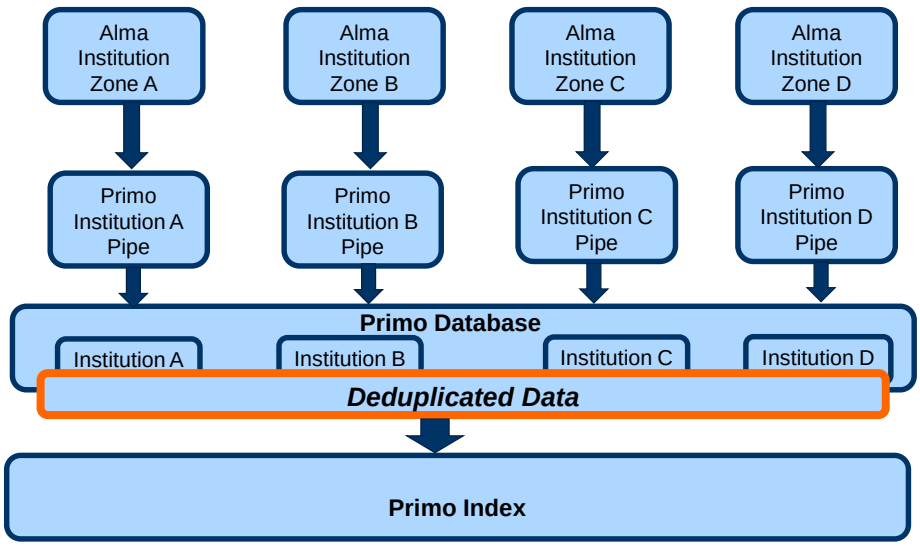
© 2017 Ex Libris | Confidential & Proprietary

Alma Publishing to Primo : at the IE level



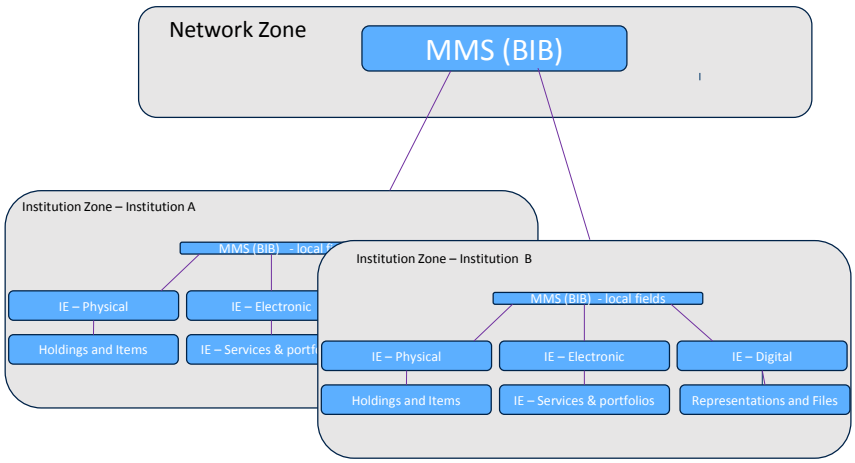
© 2017 Ex Libris | Confidential & Proprietary

Publishing Flow : IZ Publishing



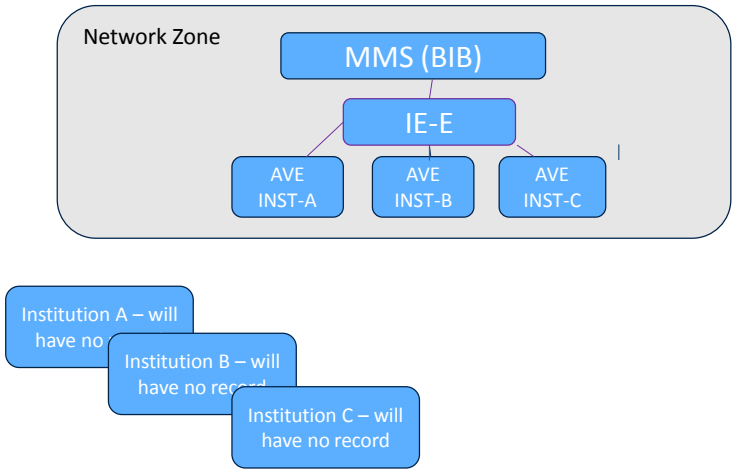
© 2017 Ex Libris | Confidential & Proprietary

Alma Data Structure: Network Zone



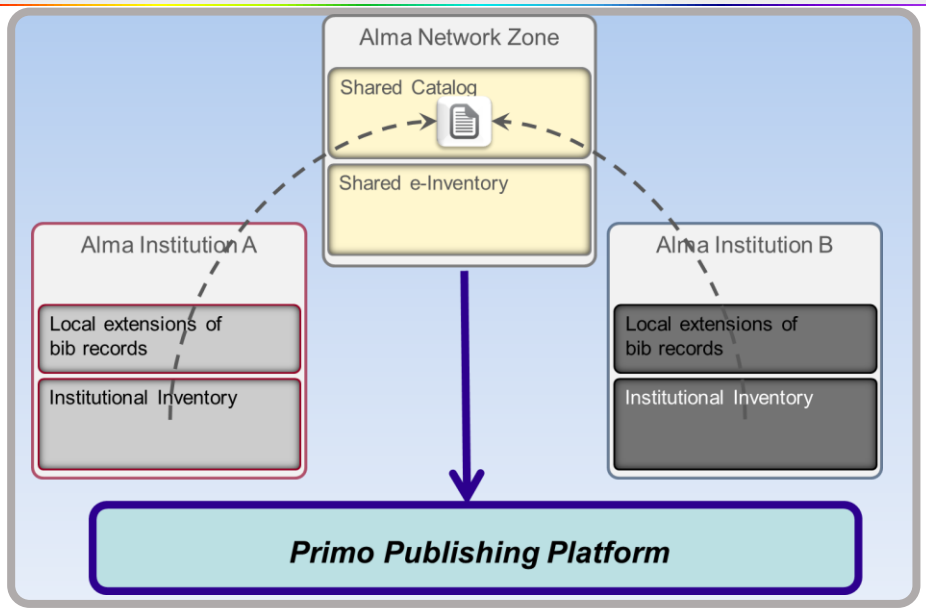
© 2017 Ex Libris | Confidential & Proprietary

Alma Data Structure: Shared Acquisitions of E



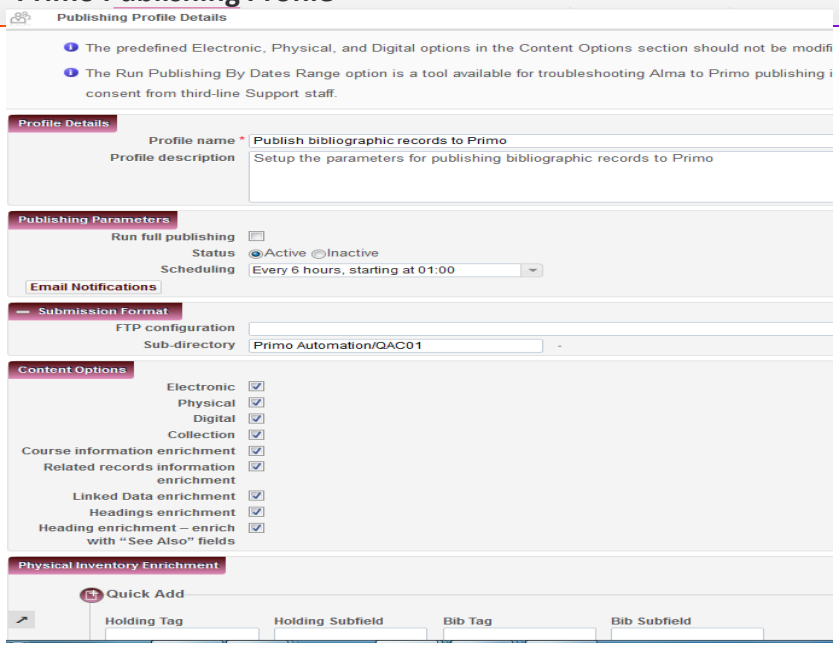
© 2017 Ex Libris | Confidential & Proprietary

Centralized Publishing



© 2017 Ex Libris | Confidential & Proprietary

Primo Publishing Profile



© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

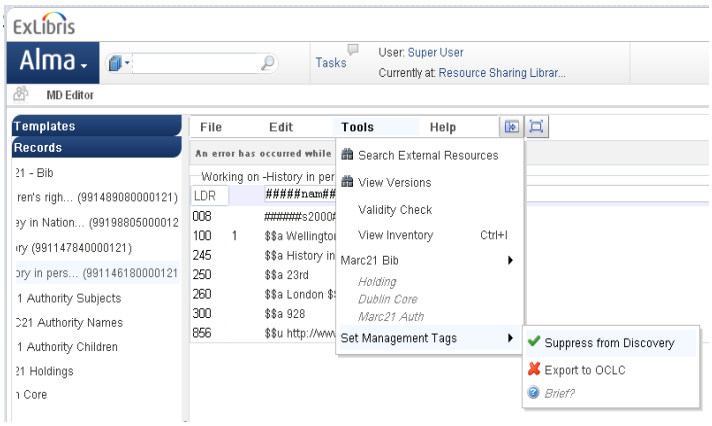
Publishing sets of record ad hoc

- 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

© 2017 Ex Libris | Confidential & Proprietary

Suppress Records from Publishing

Suppress individual bibliographic and holdings records from publi

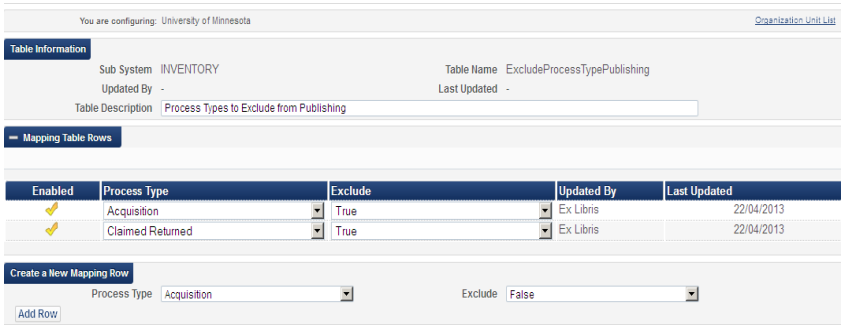


© 2017 Ex Libris | Confidential & Proprietary

Suppress Records from Publishing

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

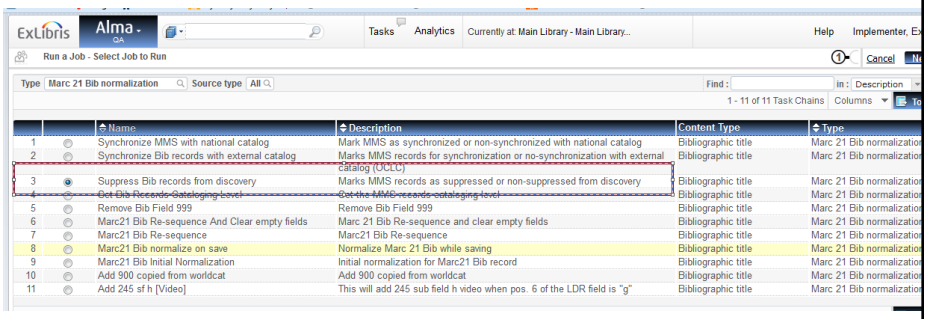
- Suppress Print inventory with specific process status



© 2017 Ex Libris | Confidential & Proprietary

Suppress Records from Publishing

- Job: Suppress BIB records from Discovery



© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary ExLibris

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

© 2017 Ex Libris | Confidential & Proprietary ExLibris

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

© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

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 • P→ Alma-P • E → Alma-E • D → Alma-D
Display Sort Facets Dedup FRBR	creator, contributor, subject, title, uniform title	Suppression of non-preferred

© 2017 Ex Libris | Confidential & Proprietary

Sample Records

- IZ publishing
- Centralized Publishing

© 2017 Ex Libris | Confidential & Proprietary

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>

© 2017 Ex Libris | Confidential & Proprietary

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>

© 2017 Ex Libris | Confidential & Proprietary

IZ Publishing PNX

<dedup>
<t>1</t>
<c3>consumerexpenditurescteristics</c3>
<c4>1977</c4>
<c5>9922340700001021</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>

© 2017 Ex Libris | Confidential & Proprietary

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">21980073800001843</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="9">local</subfield>
<subfield code="A">01ALLIANCE_EWU</subfield></datafield>

© 2017 Ex Libris | Confidential & Proprietary

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>
<availlibrary>$$IEWU$$LEWU_JFK$$1Upper Level Book Stacks$$2(E178 .A535
)$$Savailable$$X01ALLIANCE_EWU$$YJFK$$Zejs</availlibrary>
<availlibrary>$$IPSU$$LPSU_MILLAR$$1Offsite$$2(Z1236 .A51357
)$$Savailable$$X01ALLIANCE_PSU$$YMILLAR$$ZPANXRQ</availlibrary>
<availinstitution>$$IPSU$$Savailable</availinstitution>
<availinstitution>$$IWWU$$Savailable</availinstitution>

© 2017 Ex Libris | Confidential & Proprietary

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>

© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

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

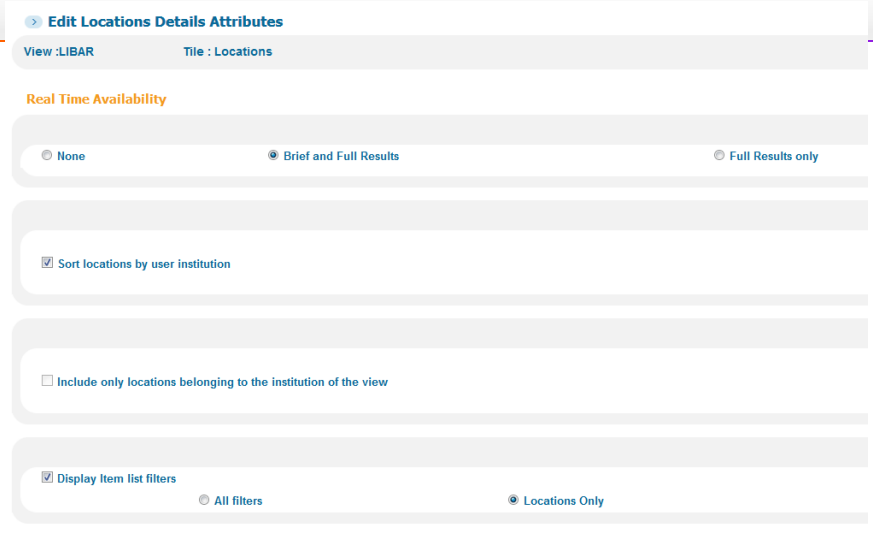
© 2017 Ex Libris | Confidential & Proprietary

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	

© 2017 Ex Libris | Confidential & Proprietary

ExLibris



© 2017 Ex Libris | Confidential & Proprietary
ExLibris

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

© 2017 Ex Libris | Confidential & Proprietary ExLibris

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

© 2017 Ex Libris | Confidential & Proprietary ExLibris

Alma Delivery

Alma Services

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

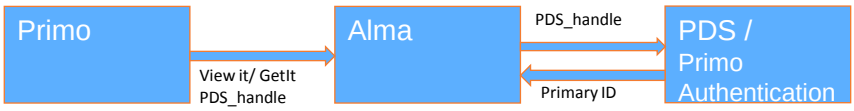
Demo
Demo Classic UI

Leuven (Fulfillment Network) Query: Outline of American history
Alliance (Resource Sharing Network)

© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

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”

© 2017 Ex Libris | Confidential & Proprietary ExLibris

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

© 2017 Ex Libris | Confidential & Proprietary ExLibris

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

© 2017 Ex Libris | Confidential & Proprietary

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.

© 2017 Ex Libris | Confidential & Proprietary

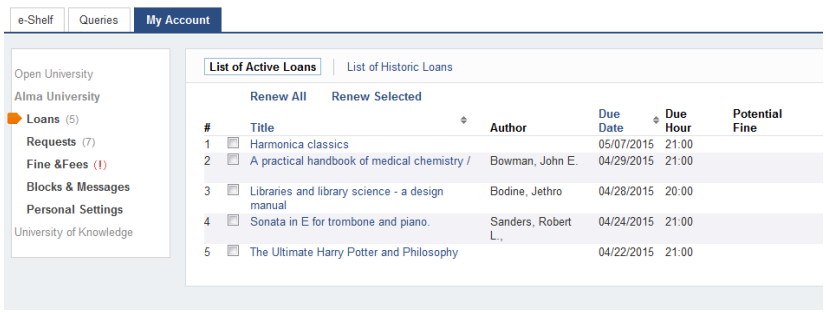
Fulfilment Networks – What is Required?

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

© 2017 Ex Libris | Confidential & Proprietary

Fulfilment Network : My Account

- Display all My Account info for all institutions



© 2017 Ex Libris | Confidential & Proprietary

Fulfilment Network: My Account - Configuration

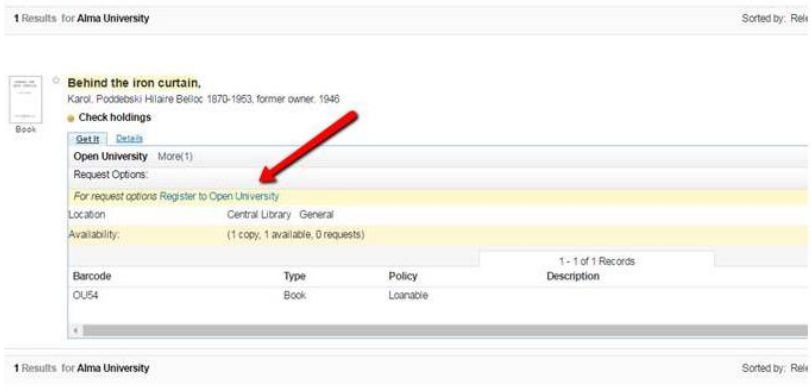
- By default Alma creates a user in the member institution (i.e. not the user's home institution) when the user accesses Get It for a member institution

- 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

© 2017 Ex Libris | Confidential & Proprietary

Manually Linked Patrons



© 2017 Ex Libris | Confidential & Proprietary

Delivery Setup in Primo

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

© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

Labels

- Fulfilment Configuration → Discovery Interface Display Logic → Labels

© 2017 Ex Libris | Confidential & Proprietary

Display Logic

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

© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

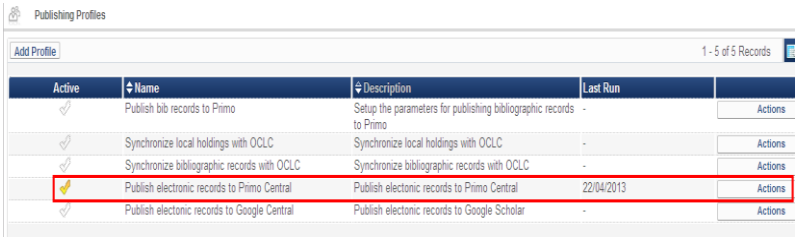
Alma as Link Resolver / ERM

- Publish holdings to Primo Central
- The Services Page

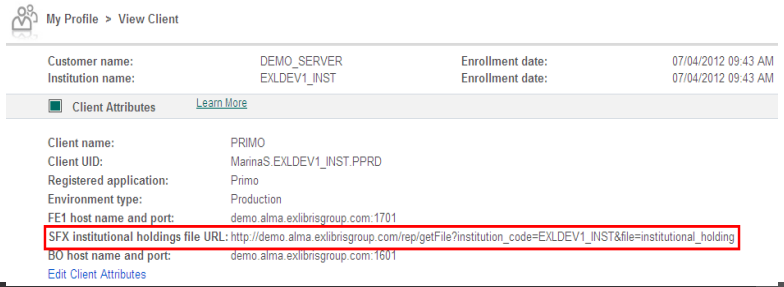
© 2017 Ex Libris | Confidential & Proprietary

Publish Holdings to Primo Central

- Publish Alma data to Primo Central

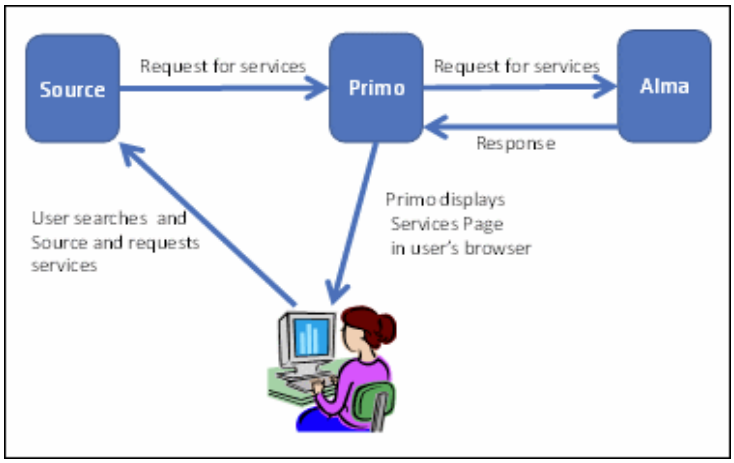


- Specify in the Registration system the location of the holdings file



© 2017 Ex Libris | Confidential & Proprietary

The Alma Services Page



© 2017 Ex Libris | Confidential & Proprietary

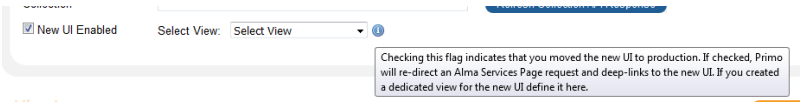
Example

- Example

© 2017 Ex Libris | Confidential & Proprietary

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”



© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

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

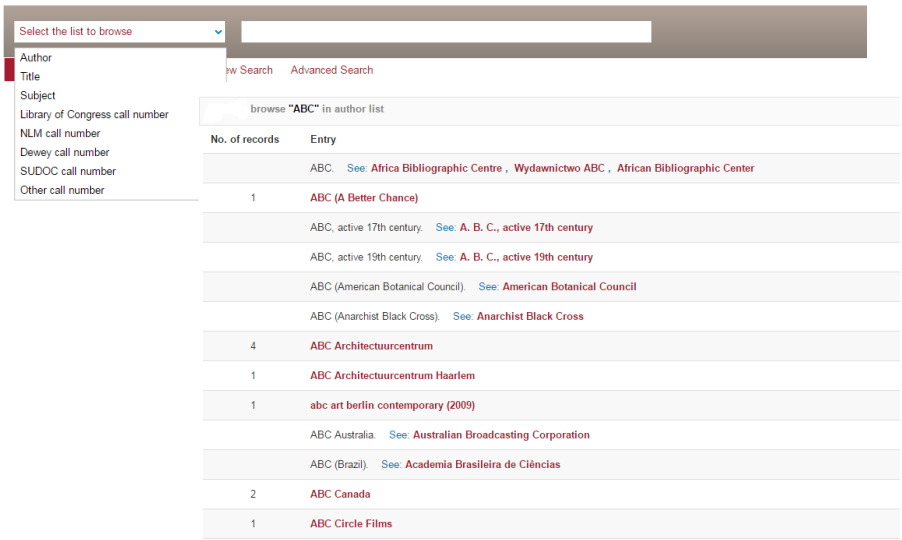
© 2017 Ex Libris | Confidential & Proprietary

Alma-Primo : Some additional interoperability points

- Browse
- Course Reserves
- Linking Records
- Collection Discovery

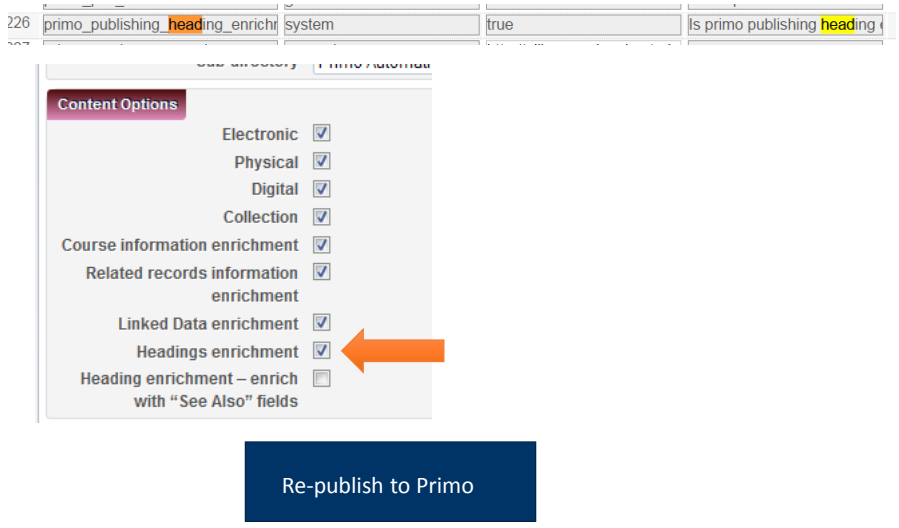
© 2017 Ex Libris | Confidential & Proprietary

Browse



© 2017 Ex Libris | Confidential & Proprietary

Browse : Setup in Alma



© 2017 Ex Libris | Confidential & Proprietary

Setup in Primo

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

© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary

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.

© 2017 Ex Libris | Confidential & Proprietary

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**

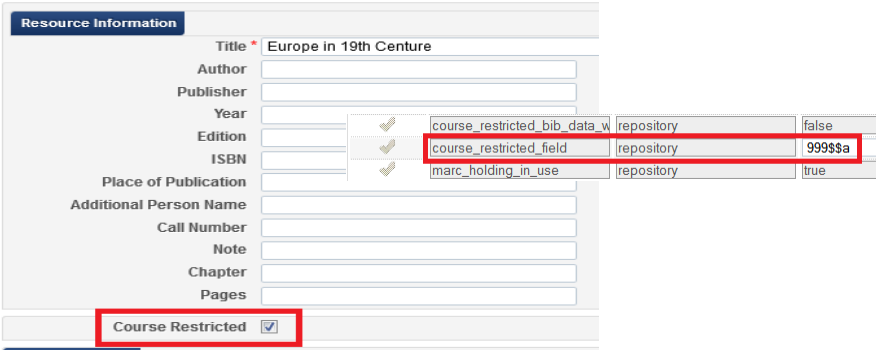
- Add search scope for Course reserves
  - <institution code>_CR added in OTB rules. Needs to be defined as a scope value

- Add search scope and tab with Course facets/indexes to your view

© 2017 Ex Libris | Confidential & Proprietary

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



© 2017 Ex Libris | Confidential & Proprietary

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"

© 2017 Ex Libris | Confidential & Proprietary ExLibris

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)

© 2017 Ex Libris | Confidential & Proprietary ExLibris

Linking Data in Records Harvested from Alma

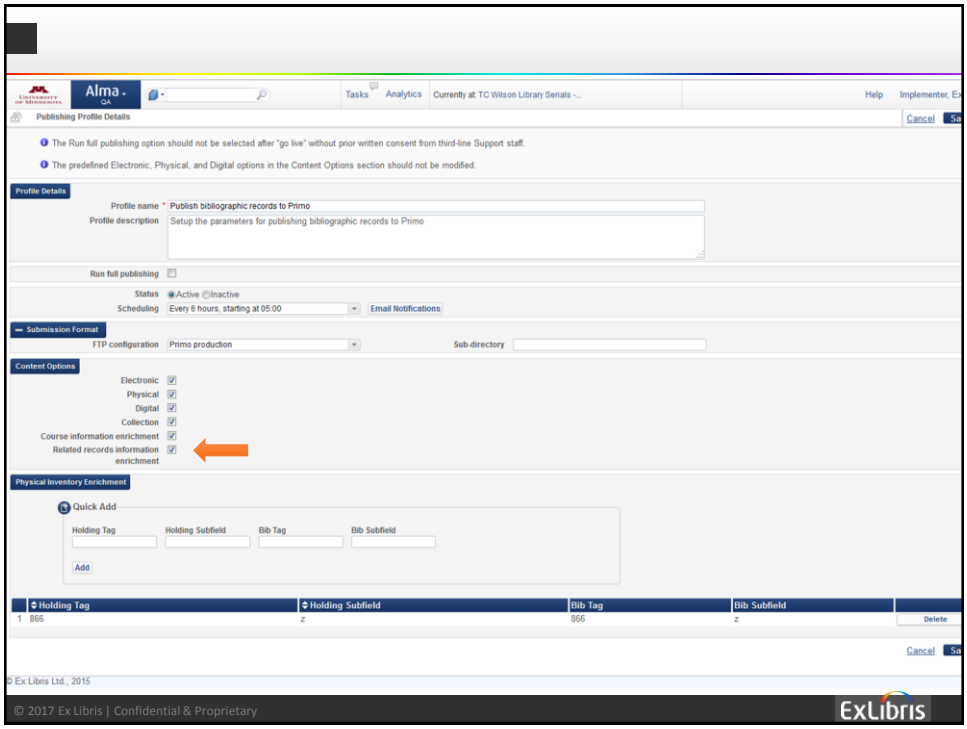
- Links in Alma are created based on MARC data
- A daily job creates a table of relationships from the data – using the MSS ID as link
  - For example
    - 773 / 774 - PART_OF / CONTAINS

© 2017 Ex Libris | Confidential & Proprietary

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

© 2017 Ex Libris | Confidential & Proprietary



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 Configurartion

© 2017 Ex Libris | Confidential & Proprietary

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"	

© 2017 Ex Libris | Confidential & Proprietary

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…

© 2017 Ex Libris | Confidential & Proprietary

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>

© 2017 Ex Libris | Confidential & Proprietary

PNX Parent Record

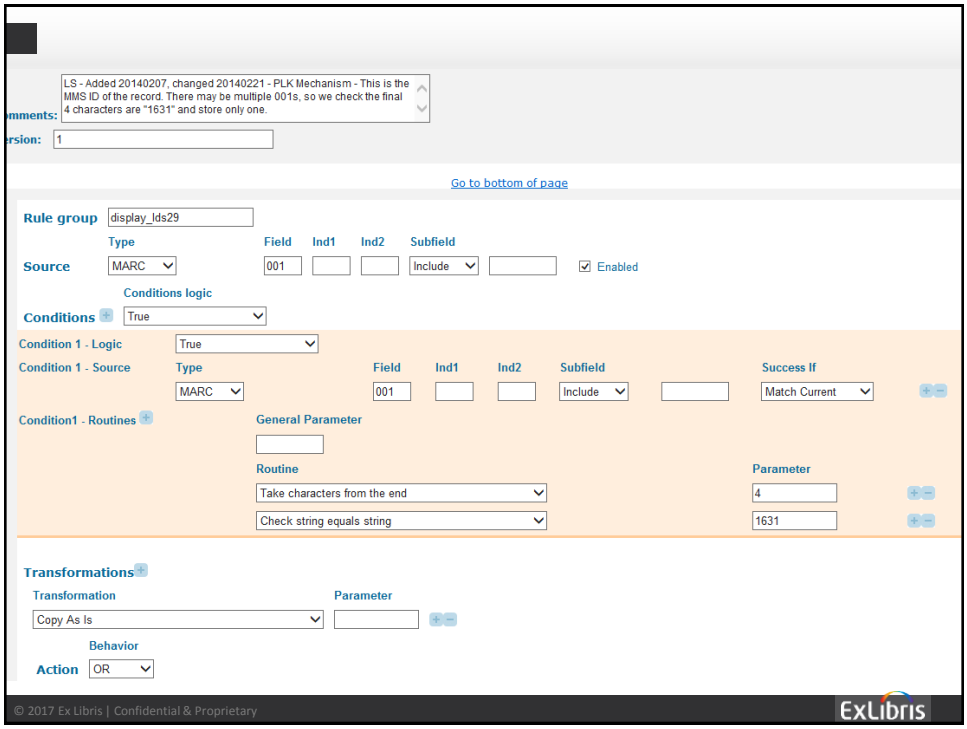
<title>**Twayne's United States authors series.SERIES.**</title>
<lds31>**DN9910239404401631**</lds31>
<lsr32>**UP9910239404401631**</lsr32>

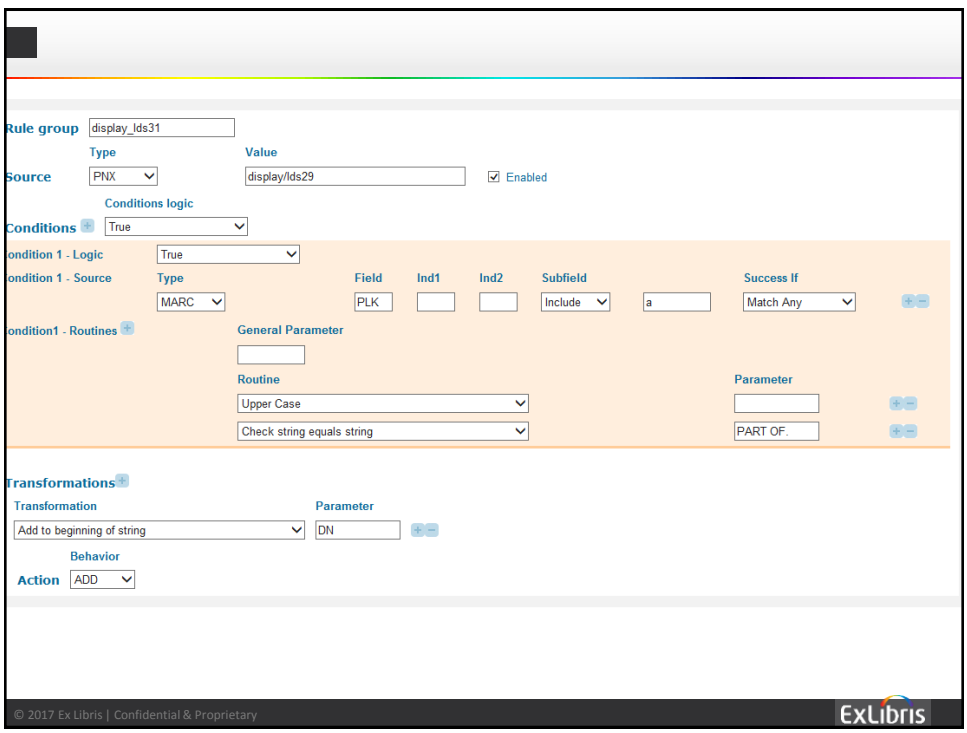
© 2017 Ex Libris | Confidential & Proprietary

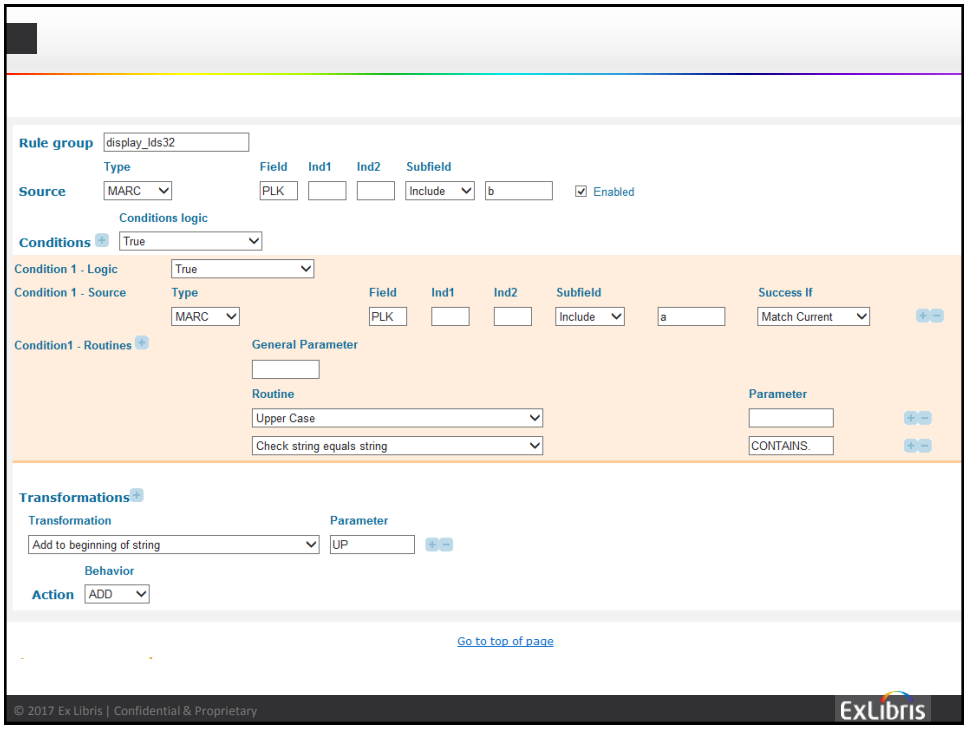
Child PNX Record

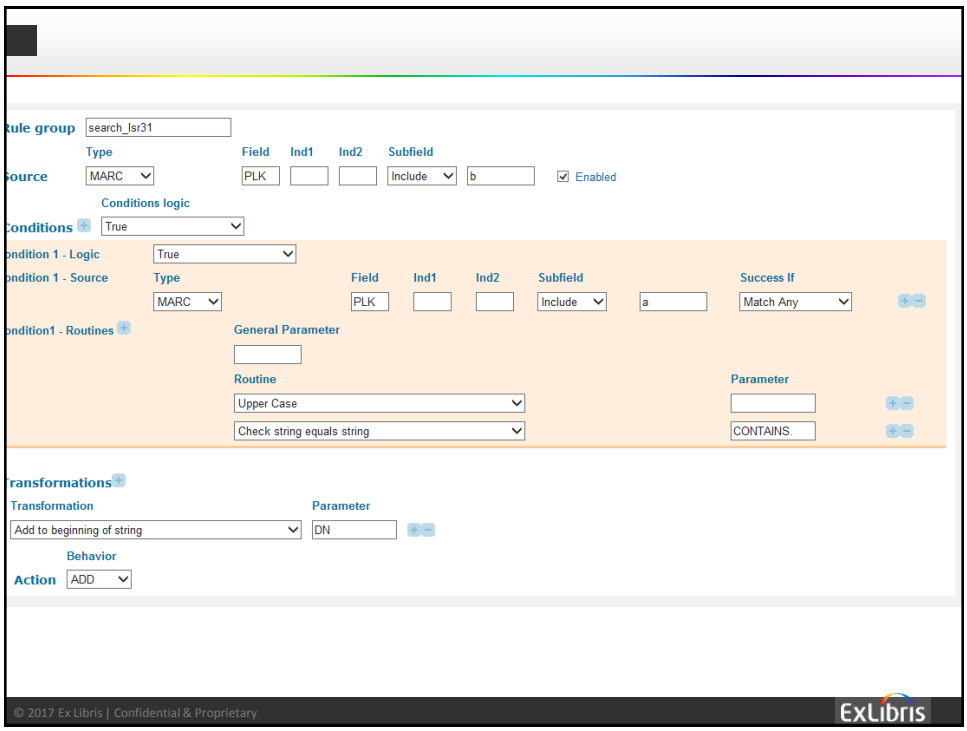
<title>**Henry Miller / by Kingsley Widmer.**</title>
<lds29>**9916507164401631**</lds29>
<lds32>**UP9910239404401631**</lds32>
<lsr31>**DN9910239404401631**</lsr31>

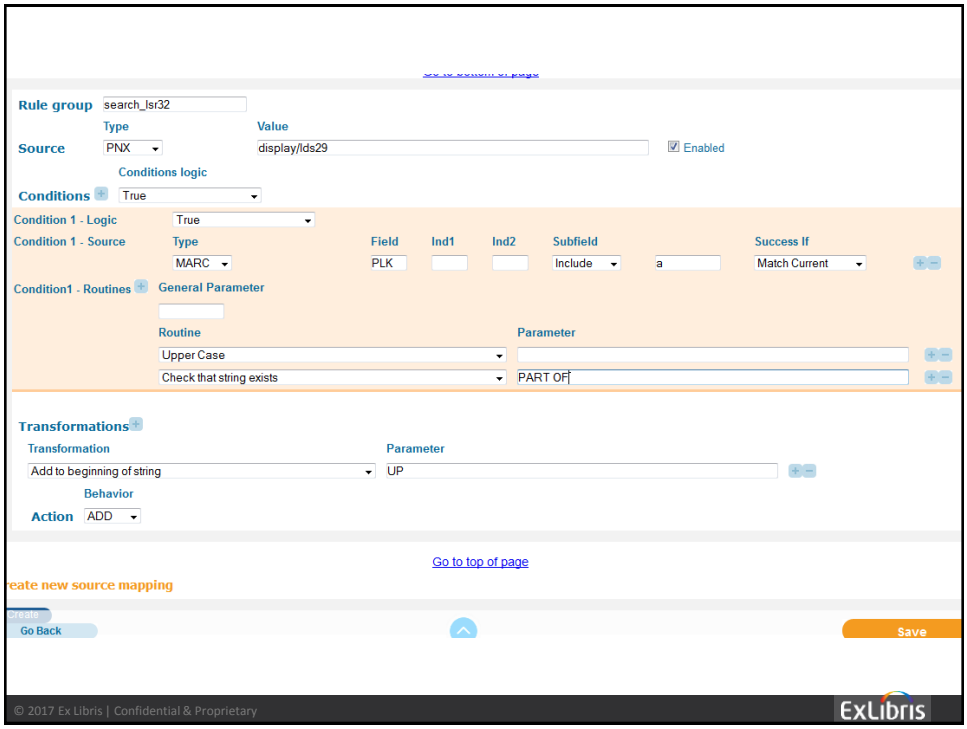
© 2017 Ex Libris | Confidential & Proprietary


mments:
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.
rsion:
1
Go to bottom of page
Rule group
display_lds29
Type
Field
Ind1
Ind2
Subfield
Source
MARC
001
Include
Enabled
Conditions logic
Conditions
True
Condition 1 - Logic
True
Condition 1 - Source
Type
Field
Ind1
Ind2
Subfield
Success If
MARC
001
Include
Match Current
Condition1 - Routines
General Parameter
Routine
Parameter
Take characters from the end
4
Check string equals string
1631
Transformations
Transformation
Parameter
Copy As Is
Behavior
Action
OR
© 2017 Ex Libris | Confidential & Proprietary
ExLibris


Rule group
display_lds31
Type
Value
Source
PNX
display/lds29
Enabled
Conditions logic
Conditions
True
ondition 1 - Logic
True
ondition 1 - Source
Type
Field
Ind1
Ind2
Subfield
Success If
MARC
PLK
Include
a
Match Any
ondition1 - Routines
General Parameter
Routine
Parameter
Upper Case
Check string equals string
PART OF.
Transformations
Transformation
Parameter
Add to beginning of string
DN
Behavior
Action
ADD
© 2017 Ex Libris | Confidential & Proprietary
ExLibris

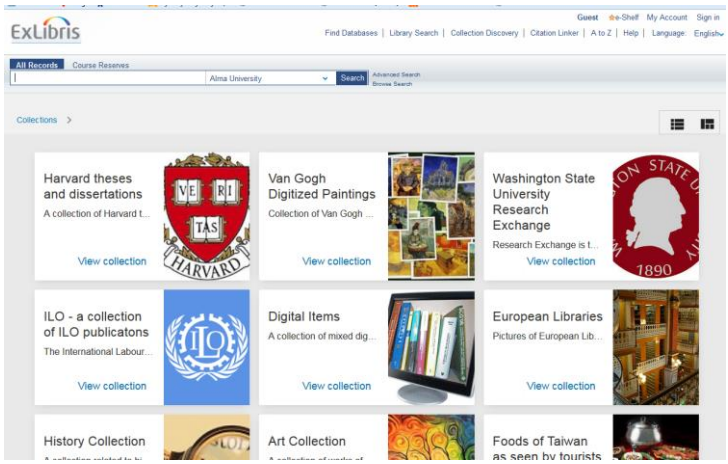

Rule group display_lds32
Type Field Ind1 Ind2 Subfield
Source MARC PLK Include b Enabled
Conditions logic
Conditions True
Condition 1 - Logic True
Condition 1 - Source Type Field Ind1 Ind2 Subfield Success If
MARC PLK Include a Match Current
Condition1 - Routines General Parameter
Routine Parameter
Upper Case
Check string equals string CONTAINS.
Transformations
Transformation Parameter
Add to beginning of string UP
Behavior
Action ADD
Go to top of page
© 2017 Ex Libris | Confidential & Proprietary
ExLibris


Rule group search_lsr31
Type Field Ind1 Ind2 Subfield
Source MARC PLK Include b Enabled
Conditions logic
Conditions True
ondition 1 - Logic True
ondition 1 - Source Type Field Ind1 Ind2 Subfield Success If
MARC PLK Include a Match Any
ondition1 - Routines General Parameter
Routine Parameter
Upper Case
Check string equals string CONTAINS.
Transformations
Transformation Parameter
Add to beginning of string DN
Behavior
Action ADD
© 2017 Ex Libris | Confidential & Proprietary
ExLibris



Collection Discovery

- Demo



© 2017 Ex Libris | Confidential & Proprietary
ExLibris

Setting up Collection Discovery

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

© 2017 Ex Libris | Confidential & Proprietary

Support Resources

© 2017 Ex Libris | Confidential & Proprietary

Support Resources

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

© 2017 Ex Libris | Confidential & Proprietary

Q & A

Any Questions?

© 2017 Ex Libris | Confidential & Proprietary

Session Survey Evaluation

Please use provide feedback on this session:

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

© 2017 Ex Libris | Confidential & Proprietary