Publishing Records in Primo

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ExLibris
a ProQuest Company

Agenda

- Publishing Overview
- Stages of Publishing
- Data Sources
- Scope Values
- Pipe Configuration
- Running Pipes

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Publishing Overview – Record in Front End

Diverse methodologies in the study of music teaching and learning
Linda K Thompson; Mark Robin Campbell c2008
Available at Music Library Music Stacks (MT1 .D58 2008)

Get It | **Details** | Virtual Browse

Actions

Title: Diverse methodologies in the study of music teaching and learning
Author: Linda K Thompson; Mark Robin Campbell
Subjects: Music -- Instruction and study
Description: The live/d performance of scholarship: shared structures and ethos in music and research / Liora Bresler -- Focus on teacher and learning. Young children's constructions of the musical knowledgeable other / Peter Whiteman ; Getting the minutes in: a case study of beginning instrumentalists' music practice / Margaret H. Berg ; First-year teachers and methods classes: is there a connection? / Margaret Schmidt ; Music educator as change agent: a personal narrative / Melissa Natale Abramo ; Teaching in an unforgiving present for the unknowable future: multicultural human subjectivity, antiracism pedagogy, and music education / Deborah Bradley ; Discourse in the band room: the role of talk in an instrumental music classroom / Teryl L. Dobbs -- Focus on social and institutionl contexts and issues. Charter schools: embracing or excluding the arts? / James R. Austin and Joshua A. Russell ; Doctoral students in music and their socialization into teaching: an initial inquiry / Susan Wharton Conkling and Warren Henry ; The role of IRBs in music education research / Linda C. Thornton.
Related Titles: Series: Advances in music education research
Publisher: Charlotte, NC : Information Age Pub.
Creation Date: c2008
Format: xxi, 218 p. : ill. ; 24 cm..
Language: English
Identifier: ISBN9781593116293 (pbk.);ISBN9781593116309 (hardcover)
Source: Training Voyager Source
RE ALMA

Links
› Table of Contents
› This item in Amazon.com
› This item in WorldCat®

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Publishing Overview – PNX

Why do we transform records?

- Start with different data repositories and different formats
- End result – all records in same format
- Allows Primo to search all records at once
- Consistent display
- Scopes, facets, browse

What do records get transformed into?

- Primo Normalized XML (PNX)

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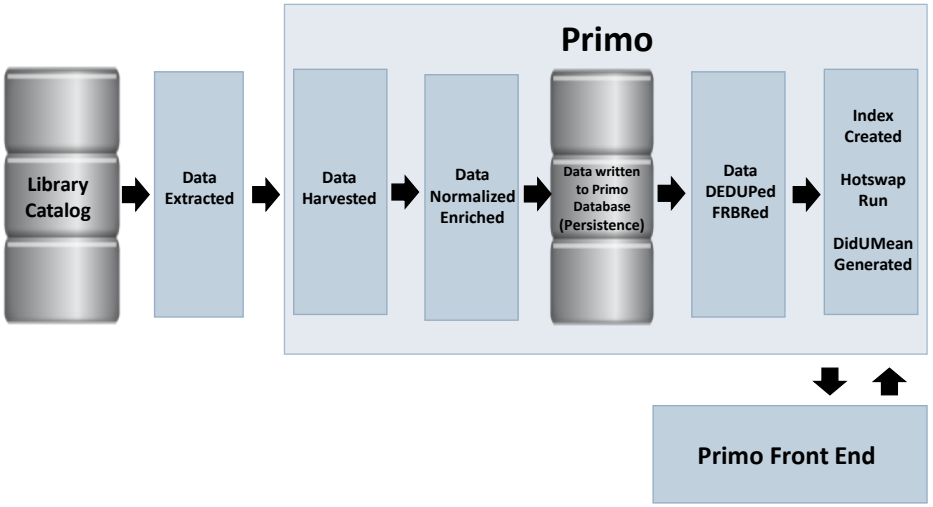
Publishing Overview – Process



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- Exercise

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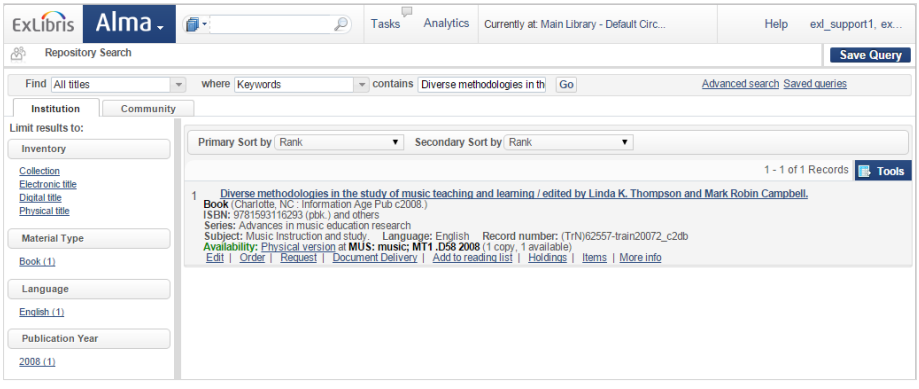
Stages of Publishing – Library Catalog

Library Catalog → Extract → Harvest → Normalize Enrich → Persistence → DEDUP FRBR → Index DidUMean Hotswap



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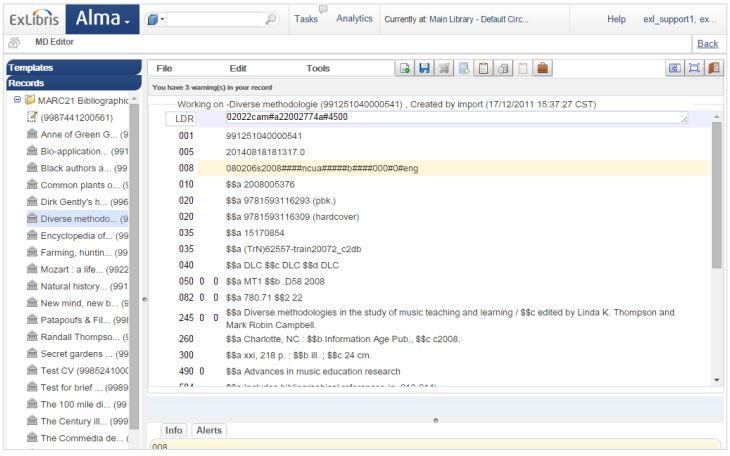

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Stages of Publishing – Extract

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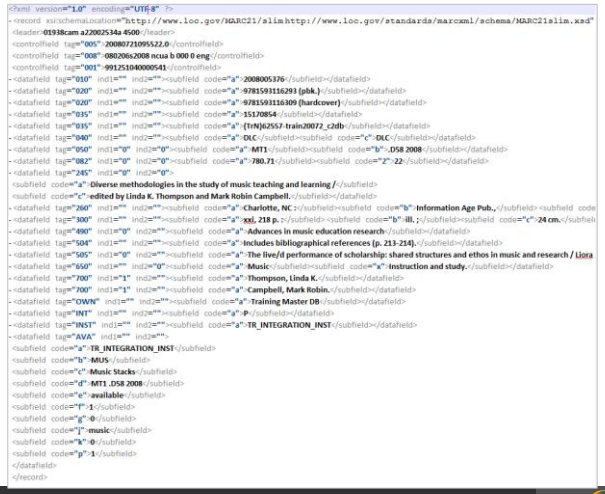
Formats
MARC Exchange
MetaLib
UNIMARC
Digital Entity
Dublin Core
DANMARC2
MARC21
XML
KORMARC
MAB
Web Archive



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Stages of Publishing – Harvest

Library Catalog → Extract → **Harvest** → Normalize Enrich → Persistence → DEDUP FRBR → Index DidUMean Hotswap

Harvest Methods
Copy
FTP/SFTP
OAI

Copy

- Manually place data on Primo server
- ILS transfers extract to Primo

FTP/SFTP

- Primo picks up extract from ILS
- ILS transfers extract to other server where Primo picks it up

OAI PMH

- Repository configured to respond to Primo's request for data

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Stages of Publishing – Normalize

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Stages of Publishing – Normalize

Library Catalog → Extract → Harvest → **Normalize Enrich** → Persistence → DEDUP FRBR → Index DidUMean Hotswap

PNX Sections	
Control	Dedup
Display	FRBR
Links	Delivery
Search	Enrichment
Sort	Ranking
Facet	Addata
	Browse

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Stages of Publishing – Normalize

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Dublin Core → PNX

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Stages of Publishing – Enrich

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Enrichment

- Ability to add data to PNX not from the source record
- Availability Enrichment (used for non-Ex Libris ILS)
- Library of Congress Classification

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Stages of Publishing – Persistence

Library Catalog | Extract | Harvest | Normalize Enrich | **Persistence** | DEDUP FRBR | Index DidUMean Hotswap

Persistence

- PNX record is 'written' to the database
- Retain a copy of the record in its original format

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Stages of Publishing – DEDUP

Library Catalog | Extract | Harvest | Normalize Enrich | Persistence | **DEDUP FRBR** | Index DidUMean Hotswap

DEDUP

- De-duplication process
- Recognizes multiple copies of the same item
- Displays them as one item with multiple copies/locations

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Stages of Publishing – FRBR

Library Catalog → Extract → Harvest → Normalize Enrich → Persistence → DEDUP FRBR → Index DidUMean Hotswap

FRBR

- Functional Requirements for Bibliographic Records
- Different manifestations of a work
- Different editions, book, video, audio book, etc.
- Displayed as one record with multiple versions – opening multiple versions will show each record separately

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Stages of Publishing – Indexing and Hotswapping

Library Catalog → Extract → Harvest → Normalize Enrich → Persistence → DEDUP FRBR → Index DidUMean Hotswap

Indexing and Hotswapping

- Separate from the normalization process
- Creates index files used for searching
- Hotswapping puts sections of index into place for searching (no downtime!)
- Index and Hotswapping runs on a daily basis

Did You Mean

- Usually run once a week

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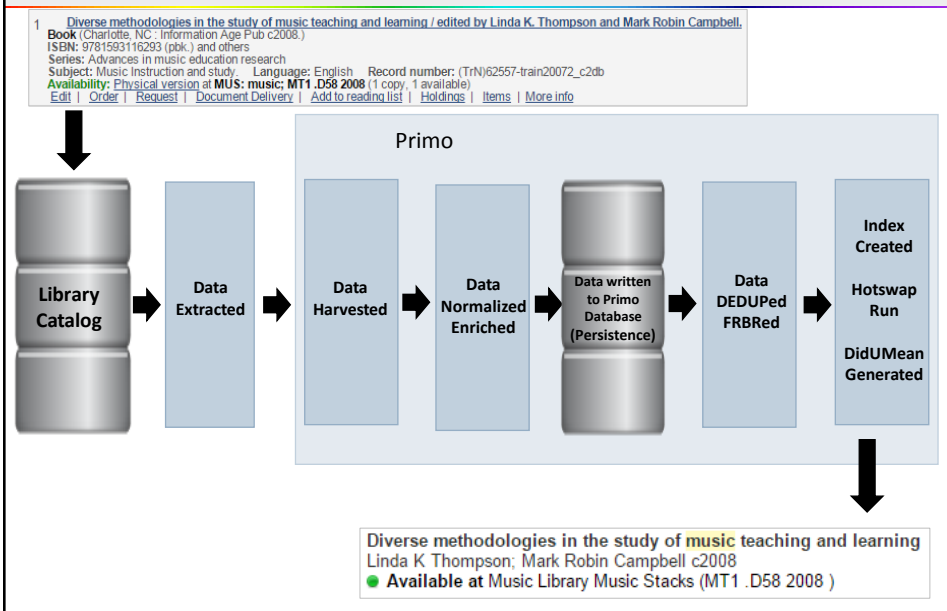
Stages of Publishing – Summary



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Data Sources Configuration – DEMO

Data Sources Overview

- Starting point for loading data
- Defines data sources and formats for institution
- Will affect how the data is loaded into Primo
- See Primo Back Office Guide for in-depth descriptions of fields

Adding a new data source

Editing a data source

Deleting a data source

- Can only delete a data source if it's not being used

Primo Back Office > Ongoing Configuration > Pipe Configuration > Data Sources Configuration

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Exercise #2a

Create a data source

- Go to Ongoing Configurations > Pipe Configuration Wizard > Data Sources
- Add a new data source
- Define parameters

See handout for step-by-step instructions

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Scope Values Configuration – DEMO

Scope Values Overview

- Default institution scope is automatically created when the Institution was created
- Used to define scope values in the Views Wizard
- Necessary for searching
- More information on Scopes in the Refining Search training

Deleting a scope value

- If the default institution scope is deleted, it will need to be redefined to provide location based delivery

Adding / Editing scope values

- Types of scopes (institution, library, collection)

Primo Back Office > Ongoing Configuration > Pipe Configuration > Scope Values Configuration

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Pipes Configuration – DEMO

Add a New Pipe

- Under Pipe configuration, don't see the existing pipes (Define pipe)
- Can also add a pipe from the Pipes List

Pipe Types

- Regular (initial load, ongoing updates)
- Delete Data Source (removing data source from Primo)
- No harvesting – update data source (Renormalize data)
- Delete data source and reload (only used if ongoing updates are full data refreshes

NEW PIPES: *Primo Back Office > Ongoing Configuration > Pipe Configuration > Pipes Configuration*
EDIT EXISTING PIPES: *Primo Back Office > Publishing > Pipes List (top navigation)*

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Pipes Configuration – DEMO

Add a New Pipe

- Define pipe name
- Define source
- Define harvest method
- Date – automatically changes to date pipe was last run (may need to adjust if deleting and reloading data)
- Defining normalization and enrichment sets
- Define last processing stage
- DEDUP and FRBR forcing

NEW PIPES: *Primo Back Office > Ongoing Configuration > Pipe Configuration > Pipes Configuration*
EDIT EXISTING PIPES: *Primo Back Office > Publishing > Pipes List (top navigation)*

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Pipes Configuration – DEMO

Editing a Pipe

- Go to Pipes List (can add one here, too)

Deleting a Pipe

- In Primo Back Office, can only delete pipes that haven't been used

NEW PIPES: *Primo Back Office > Ongoing Configuration > Pipe Configuration > Pipes Configuration*
EDIT EXISTING PIPES: *Primo Back Office > Publishing > Pipes List (top navigation)*

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Pipes Configuration – DEMO

Running a Pipe

- Executing a pipe
- Terminating a pipe

History

- Status

Logs

- Log, Harvest Log, Dedup/FRBR logs

Errors

- Show why records weren't loaded

NEW PIPES: *Primo Back Office > Ongoing Configuration > Pipe Configuration > Pipes Configuration*
EDIT EXISTING PIPES: *Primo Back Office > Publishing > Pipes List (top navigation)*

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Pipes Configuration – DEMO

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Exercise #2b

Create and run a pipe to load data into Primo

- Go to Ongoing Configurations > Pipe Configuration Wizard
- Create a new pipe
- Run pipe

See handout for step-by-step instructions

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