Harvesting and Publishing Alma Records in Primo

Note

If you are working with Primo VE, see Primo VE for more details.

Before you can harvest the exported Alma data in Primo, you must configure the institution, data source, normalization rules, and publishing pipe in Primo. For more information on configuring the institution, see Configuring the Primo Institution. The sections below describe how to define the data source, configure the normalization rules, and publish the records in Primo.

Define Alma as a Data Source

In order to harvest records from Alma, you must define the Alma data source in Primo.

To define the data source in Primo:

1. Open the Primo Data Sources page (Ongoing Configuration Wizards > Pipe Configuration Wizard page > Data Sources Configuration).
2. Select Edit next to your Alma institution in the list.

The Data Sources Attributes page opens.

3. Configure the data source. The following fields are essential for Alma data sources:
   - **File Splitter** – Select OAI splitter.
   - **Source system** – Select Alma.
   - **Character Set** – Select UTF-8.
   - **Source format** – Select MARC 21.
4. Select Save & Continue.

Create a Set of Normalization Rules

The normalization rules determine how the source records are converted to Primo PNX records. For new installations, it is recommended to create a set of normalization rules by copying the Alma MARC - Template template, which contains all definitions required to load Alma data and work with Alma online. For more information on the Alma MARC - Template, see Alma MARC 21.

If you are performing a migration, it is recommended to create a copy of an existing normalization rules set and add or modify the following PNX fields, using the Alma MARC - Template template as an example:

- **Control/almaid** – This field contains a combination of the Alma institution code and Alma system number (MMS ID).
- **Dedup/C5** – Add the MSS ID, which is used for matching.

**Note**

Alma publishes separate records to Primo for each delivery type originating from the same MMS record in Alma. To prevent multiple records from displaying in Primo, deduplication must be enabled, and the MMS identifier in the Alma records must be mapped to the dedup/C5 field in the PNX records.

- **Delivery/delcategory** – Alma delivery is based on the delivery types Alma-E (for electronic publications), Alma-P (for print) and Alma-D (for digital materials).
- **Delivery/institution** – This field should be created from INST $$a and AVE $$i, as mapped from the Summary tab on the Organization Unit Details page in Alma (Administration > General Configuration > Configuration Menu > Libraries > Manage your Institution’s Libraries).
- **Display/creator, Display/contributor, Display/subject** – If headings enrichment is activated for Browse, it is necessary to suppress the creation of the creator and contributor fields from non-preferred headings.
- **Display/availlibrary** – This field should be created from the AVA field that is published by Alma.
- **Display/type** – The Alma_Type mapping table is used for the Alma-D delivery category. In addition, the database resource type is created when the ECT (Electronic Collection Type) field is set to database.
- **Facets/toplevel** – Include Alma-E and Alma-D as online_resources.
- **Facets/AtoZ** – This facet should be created for the A-Z list.
- **Facets/Collection** – The collection facet can be created from the COL field that Alma includes for Alma-D records.
- **Facets/creatorcontributor and Facets/Topic** – Primo Version 4.1 and later releases include Browse functionality. If Headings Enrichment is activated for Browse, it is necessary to suppress creation of the creator and contributor fields from non-preferred headings.
- **Links/thumbnail** – A link should be added for the Alma-D delivery category.
- **Links/linktosrc** – A link is created from 856 fields for Alma-P. This is done in case the conversion to Alma could not create an Alma-E record.
- **Links/linktoholdings** – It should be disabled if present.
- **Link/backlink** – Disable this field because Alma does not have an end-user interface from which to link to the Alma records.
• **Search/searchscope** – Define a search scope for retrieval of Alma data if necessary. In addition, a scope should be added for the A-Z list.

• **Search/general** – Add 001, which contains the MSS.

• **All Browse section fields** – Used for Browse functionality. Refer to the [Browse section](#) for more information.

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**Deploy, Load, Index (not Alma-specific)**

After you have configured the institutions, libraries, Alma data source, enrichment sets, normalization rules, and so forth: you must apply your changes to the system and normalize the records published by Alma.

These steps are not specific to Alma and do not require special attention for Alma. For more information, see [Configuring the Publishing Platform Pipe Flow](#).

**To load the Alma records into Primo after records were published from Alma:**

1. In the Primo Back Office, run **Deploy all**.

2. Create a publishing pipe for the harvesting and loading of Alma data.

   **Note**
   
   Use the S/FTP connection that was defined in Alma. For more information, see [Publishing to Primo](#).

3. Execute the publishing pipe.

4. Run indexing.

5. After configuring ongoing publishing in Alma, schedule a pipe for ongoing updates from Alma.