Alma-Primo Integration
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Introduction to Alma-Primo Integration

Note

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

*Primo* is Ex Libris’ patron-facing discovery service, providing centralized and personalized access to all resources in your fulfillment network: your institution and any partner institutions. Patrons can locate physical, electronic, and digital resources in all locations, with availability information for physical resources (including the ability to request these resources for checkout at the location of the patron’s choice), and instant online access to electronic and digital resources.

Alma information is published to Primo on a regular basis. Electronic and digital resources are available directly from Primo’s local database or the Primo Central Index (PCI).

This guide explains the interoperability between Alma and Primo and details the steps that you must take to integrate the two systems.

Primo serves the following functions:

• Provides the Front End interface for patrons to:
  ◦ Search and request services for library resources managed in Alma. For more information, see Configuring the Primo Front End for an Alma Data Source.
    
    In order to enable this functionality, all types of Alma data (such as physical, electronic, and digital data) must be published and loaded into Primo. For more information, see Publishing Alma Data to Primo.
  ◦ Search for and request services for remote records (such as Primo Central and MetaLib records) via Alma’s link resolver. For more information, see Out-of-the-Box Delivery Settings for Remote Search Records.
    
    To provide availability information for remote records, the following must be enabled for each remote source you are using:
    ▪ For Primo Central records, institutional electronic holdings must be extracted from Alma and placed in a holdings file that your institution has registered with Primo Central. For more information, see Alma as a Source of Holdings Information for Primo Central.
    ▪ For MetaLib records, you must configure MetaLib to use the Alma RSI API to check for availability. For more information, see the Configuring Your Link Resolver section in the *MetaLib System Configuration and Administration Guide*.
  ◦ Perform My Library Card functions via the My Account tab. For more information, see My Account.
  
  • Provides the UI for Alma Link Resolver services for searches that are not initiated via Primo (such as EBSCO, Google Scholar, and bX). The result of these searches is a dedicated Primo page (called the Services Page) that offers both Primo and Alma services, but does not provide discovery. For more information, see Configuring the Primo Front End for Alma’s Link Resolver.

  • In addition, Alma can serve as the user directory for user authentication and authorization for Primo. For more information, see Alma and Patron Directory Services.

See Alma-Primo Interoperability for detailed training sessions on Alma-Primo integration.
Basic Primo Configuration for Integration with Alma

**Note**

If you are working with Primo VE, see [Primo VE](#) for more details.

This section includes:

- [Configuring the Primo Institution](#)
- [Viewing and Exporting the Alma Libraries](#)
To work with Primo in conjunction with Alma, you must configure the Primo institution in the Primo Back Office as described below.

To configure the Primo institution:

1. In the Primo Back Office, select Primo Home > Ongoing Configuration Wizards > Institution Wizard.

2. If you have not already created a Primo institution for your Alma institution, fill in the information for your institution and select Create in the Create a New Institution section. Otherwise, continue with the next step.

3. In the Select Institution for Editing section, select Edit next to the institution that is to be used for Alma. The Edit Institution page opens.

4. In the General Institution Attributes section, enter the following fields:

   - **Alma Institution Code** – Enter the institution code defined in Alma.
   - **SFX institute** – Leave blank.
   - **Source ILS Institution Codes** – Enter the institution code defined in Alma.
   - **Alma Campus Code** – If you are defining Primo institutions at the campus level, enter the Alma inventory network group, which is defined in Alma. Otherwise, leave this field blank.

   For information regarding the other fields, see Configuring Primo Institutions and Libraries.

   ![General Institution Attributes (Institution Wizard)](image)

5. In the Delivery Base URLs section, enter the following fields:
<table>
<thead>
<tr>
<th>Parameter</th>
<th>Details</th>
</tr>
</thead>
</table>
| **Alma** | Enter the URL of Alma’s link resolver (for more information, see [Your Alma Domains](#)). Use the following format:  
https://<Alma delivery domain>/view/uresolver/<Alma_institution_code>/openurl  
For example:  
https://university.userservices.alma.exlibrisgroup.com/view/uresolver/01UNI_INST/openurl  
APAC sites should use the accelerated <Alma delivery domain>. For example:  
https://university-a.userservices.alma.exlibrisgroup.com/view/uresolver/01UNI_INST/openurl  
If you are defining Primo institution’s at the campus level, include the campus code. Use the following format:  
https://<Alma delivery domain>/view/uresolver/<Alma_institution_code>/openurl-<Alma_campus_code>  
For example:  
https://university.userservices.alma.exlibrisgroup.com/view/uresolver/01UNI_INST/openurl=NORTH |
| **Alma Services Page URL** | Enter the base URL for the Services Page view. For more information, see [Base URL for the Services Page](#). Currently, this field is used for the bX Hot Articles service (classic Primo UI) and for the bX Recommendations service (new Primo UI). For more information about bX services, see [bX Hot Articles](#) and [bX Recommendations](#). Use the following format:  
http://<primo server host:port>/openurl/<Primo_Inst_Code>/<Primo_Services_Page_View_Code>?  
**Note**  
To switch from the classic Primo UI to the new Primo UI, you must select the **New UI Enabled** check box and specify the view used for the new UI from the **Select View** drop-down list.  
For new Primo installations that are going directly to the new Primo UI, use the following format:  
**Note**  
For the new Primo UI, it is no longer necessary to create a separate view for the Services page. |
| **RTA** | Enter the URL that provides Primo with real-time availability statuses. Use the following format:  
https://<Alma domain>/view/publish_avail  
APAC sites should use the <Alma alternate domain> instead of the accelerated Alma domain. For details, see [Your Alma Domains](#). |
<p>| <strong>API</strong> | Enter the URL of the Alma API that performs the following: |</p>
<table>
<thead>
<tr>
<th>Parameter</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>◦ Returns user information required for My Library Card functionality.</td>
</tr>
<tr>
<td></td>
<td>◦ Utilizes the Alma RSI API to return full text availability indication for records returned by remote searches using MetaLib.</td>
</tr>
<tr>
<td></td>
<td>Use the following format: https://&lt;Alma domain&gt;. The URL must be defined previously in the <em>ILS API Configuration mapping table</em>.</td>
</tr>
<tr>
<td></td>
<td>APAC sites should use the &lt;Alma alternate domain&gt; instead of the accelerated Alma domain. For details, see <em>Your Alma Domains</em>.</td>
</tr>
<tr>
<td>PC Key</td>
<td>Specify the PC Key received during the registration of Primo Central. For more information, see <em>Primo Central Index Registration</em>.</td>
</tr>
<tr>
<td>Collection</td>
<td>If you are using the Collection Discovery interface, set this field to the same value as the API base URL. For more information about Collection Discovery, see <em>Configuring Discovery for Alma Collections</em>.</td>
</tr>
<tr>
<td></td>
<td>A collection API request is sent once an hour and is cached in memory. The <em>Refresh Collection API Response</em> button (which appears next to the Collection field) allows you to refresh the API response manually as needed.</td>
</tr>
<tr>
<td>DB Category</td>
<td>The base URL of your database repository. For Alma customers who are using the Database Search interface with database categories, this field should be set to the same value as the API field. For more information, see <em>Configuring the Database Search Interface</em>.</td>
</tr>
</tbody>
</table>

### Delivery Base URLs (Institution Wizard)

The **SFX** base URL field must be left blank when integrating with Alma. Otherwise, the system assumes that Primo is using the SFX link resolver.

6. If you want switch to the new Primo UI and receive bX recommendations, you must set the **New UI Enabled** field and populate the **Alma Services Page URL** field. For additional information, see *bX Recommendations*.  

7. Obtain the names of the libraries used in Alma. For more information, see *Viewing and Exporting the Alma Libraries*.  

8. In the **Libraries** section, define the associated Alma libraries, using either of the following sections on the Edit Institution page:  
   ◦ **Load Libraries** – Enter the name of the file that you used to export the libraries from Alma. For more information, see *Loading Libraries*.  

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Create a New Library – This section allows you to map codes from Alma to Primo individually. Enter the following fields:

- **Primo Library Code** – Enter the code of the library used in Primo.
- **Primo Library Name** – Enter the name of the library used in Primo.
- **Source ILS Library Code** – Enter the code of the Alma library that you are mapping to Primo.

**Note**
As a general rule, the Primo library codes can be identical to the codes that are used in Alma.

9. Select **Save & Continue**.

The Edit IPs page opens.

10. On the Edit IPs page, use either the **Create a New IP Range** section or **Load IPs** section to configure the IP addresses for your institution. For more information, see **Loading IPs**.

11. Deploy your changes to the Front End.
See Alma and Primo Interoperability for detailed training sessions on Alma-Primo integration.
Viewing and Exporting the Alma Libraries

**Note**

If you are working with Primo VE, see [Primo VE](#) for more details.

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To define the libraries for the Primo institution, you should obtain the libraries that are defined for the Alma institution. To save time, Alma allows you to export the libraries to a file so that they can be imported in Primo.

**To export the Alma libraries:**

1. Log on to the Alma UI.
2. On the Organization Unit Details page (Administration > General Configuration > Libraries > Add a Library or Edit Library Information), select the Libraries tab to view the available libraries.

   ![Libraries Tab](https://via.placeholder.com/150)

   **Libraries Tab**

   The information you will need is in the following columns:

   - **Organization Unit Name** – The Alma library name.
   - **Path** – The component at the end is the Alma library code.

   For example, INC is the Alma library code for the following path:

   EXLDEV1.EXLDEV1_INST.INC

3. Select ![Export](https://via.placeholder.com/150) to export the list of Alma libraries to an Excel file.
4. Change the exported file to the format described in the [Loading Libraries section](#).
Publishing Alma Data to Primo

**Note**

If you are working with Primo VE, see [Primo VE](#) for more details.

This section includes:

- Exporting Alma Records to Primo
- Suppressing Alma Records from Primo
- Republishing Sets of Bibliographic Records
- Excluding Resources with Specific Process Types from Publishing
- Displaying Alternative Call Number Information in Primo
- Publishing Inventory Management Group Information to Primo
- Harvesting and Publishing Alma Records in Primo
Exporting Alma Records to Primo

**Note**

If you are working with Primo VE, see [Primo VE](#) for more details.

To configure publishing to Primo, you must have one of the following roles:

- Catalog Administrator
- Repository Administrator
- General System Administrator

You can automatically export records to Primo using a publishing profile. For details on configuring this publishing profile, see [Publishing to Primo](#).
Suppressing Alma Records from Primo

Note

If you are working with Primo VE, see Supressing Alma Records from Primo VE.

You can suppress Alma records from discovery in the following ways:

• Suppress all records at a physical location – Select the Suppress from Discovery check box for a location. For more information, see Editing a Physical Location.

Note

After a location has been suppressed or unsuppressed, you must execute the Primo Republish Set of Titles job in order to update the availability information for the holdings. For more information, see Republishing Sets of Bibliographic Records.

• Suppress an individual record – In the MD Editor, select the Suppress from Discovery option for the holdings or bibliographic record. For more information, see Navigating the MD Editor Page. Note that suppression takes effect even without saving the record.

• Set one of the following parameters to true in Configuring Other Settings:
  ◦ suppressBibWithDeletedHol – When set to true, suppresses the bibliographic record if the holdings records are deleted.
  ◦ suppressBibWithSuppressedHol – When set to true, suppresses the bibliographic record if the holdings records are suppressed.

• Exclude resources with specific process types. See Excluding Resources with Specific Process Types from Publishing.
Republishing Sets of Bibliographic Records

**Note**

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

You can create a set of records and then publish them to Primo. When publishing a user-defined set (unlike regular publishing), the publishing process does not check whether the contents of the record have changed since the last time it was published. You can schedule this publishing process independently from the regular publishing process. The submission format information is taken from the publishing profile.

**Note**

When publishing records to Primo, the set of records must contain either MARC records (any combination of MARC 21, UNIMARC, KORMARC, ...) or Dublin Core records, not a mixture of both. To ensure that this is the case, when creating the record set, use an advanced search and select Record format as a search parameter. For more information, see Search Field Descriptions.

For collaborative networks that are using centralized publishing, you can republish sets of records from the Network Zone. For more information, see Republishing Sets of Bibliographic Records from the Network Zone.

**To republish a set of records in non-collaborative network:**

Run the Primo Republish Set of Titles job. For more information, see Running Manual Jobs on Defined Sets.
Excluding Resources with Specific Process Types from Publishing

Loaned items with specific process types, for example claimed as returned or lost, can be excluded so that they are not displayed to end users during discovery or Z39.50 catalog search. This prevents lost loans from being requested.

**Note**

- Excluding resources with specific process types hides the items. In a scenario where you have a title with just one item and a process type that is excluded from publishing (such as Acquisition), the associated holdings is suppressed as well. The parameter `suppressBibWithSuppressedHol` thus controls whether the bibliographic record is published. See [Configuring Other Settings (Resource Management)] for more information about this parameter.
- It is not possible to create new process types.

The display labels for the process types are defined with the Discovery interface. For more information, see the relevant section for your type of environment:

- [Modifying Display Labels for Primo](#)
- [Configuring Display Labels for Primo VE](#)

**To exclude a process type from discovery indexing:**

1. Open the Exclude Process Types from Publishing mapping table (Primo: [Configuration Menu > Resources > Record Export > Exclude Process Types from Publishing]; Primo VE: [Configuration Menu > Discovery > Other > Exclude Process Types from Discovery Indexing]).

2. Select **Add Row** to open the Add Row dialog box.
3. Select the process type to exclude (such as Claimed Returned and Lost) from the Process Type drop-down list.

4. Set the Exclude field to True.

5. Set the Material Type field if needed.

6. Select Add Row.

7. Select Save.

The content that appears in the Material Type column is determined by the Physical Item Material Type Descriptions configuration. If the Material Type column is empty for a specified process type, all items of this process type are excluded. If this column contains a value, only items of the specified process type and physical material type are excluded. See Configuring Physical Item Material Type Descriptions for more information about configuring Physical Item Material Type Descriptions.
Displaying Alternative Call Number Information in Primo

**Note**

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

You can display the alternative call number information in the Get It tab in Primo.

To display the alternative call number information in Primo:

Set the parameter `display_alternate_call_number_in_getit` to `true`. See Configuring Other Settings.
For e-resources in an Alma multicampus environment, you can add library-level ownership and inventory management group (Available For) information to the bibliographic records published to Primo. This can be implemented by defining a separate Primo institution for each Alma campus and using the AVE field as the basis for defining the Primo institution in the PNX records.

Alma includes the following data fields for Primo Publishing:

- **AVE** – (Available Electronic) for inventory management group information:
  - **i** – contains a single e-resource's inventory management group institution code
  - **c** – contains a single e-resource's inventory management group campus code
  - **l** – contains a single e-resource's inventory management group library code

If an e-resource is open and available to all campuses, a single AVE field with subfield i and the value "ALL" is added in addition to the AVE fields created for all of the specific campuses.

For example, if an e-book is available for all campuses/libraries, which includes Main Library, West Campus, and East Campus, the following will be listed in the publishing XML file:

```xml
<datafield tag="AVE" ind1=" " ind2=" ">
  <subfield code="i">64U_INST</subfield>
  <subfield code="c">Main Library</subfield>
</datafield>
<datafield tag="AVE" ind1=" " ind2=" ">
  <subfield code="i">64U_INST</subfield>
  <subfield code="c">West Campus</subfield>
</datafield>
<datafield tag="AVE" ind1=" " ind2=" ">
  <subfield code="i">64U_INST</subfield>
  <subfield code="c">East Campus</subfield>
</datafield>
<datafield tag="AVE" ind1=" " ind2=" ">
  <subfield code="i">64U_INST</subfield>
  <subfield code="c">ALL</subfield>
</datafield>
```

If you choose not to create a Primo institution for each Alma campus, you can use the AVE information to create search scopes and search campus-specific e-resources.

- **OWN** – (Ownership) for the ownership information:
  - **i** – contains a single e-resource ownership associated with the bibliographic record (the institution ID)
• I – contains a single e-resource ownership associated with the bibliographic record (the library)

To configure inventory management groups, see Configuring Distributed Access to Electronic Resources.
Harvesting and Publishing Alma Records in Primo

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

Define Alma as a Data Source

Alma can manage MARC21 and Dublin Core (DC) metadata and publish it to Primo. If you manage both MARC21 and DC data in Alma, you will need to set up separate data sources, normalization rules, and pipes for each data source to load the data correctly into Primo.

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

To define for an Alma data source (MARC21 and/or DC):

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:
Create a Set of Normalization Rules

Normalization rules determine how the source records are converted to Primo PNX records. For new installations, it is recommended that you copy the following templates to create a set of normalization rules for each type of data supported by Alma (MARC21 and DC):

- **Alma MARC - Template** – Contains all definitions required to load MARC21 data and to work with Alma online. For more information on the Alma MARC - Template, see Alma MARC 21.

- **Alma Dublin Core - Template** – Contains all definitions required to load DC data and to work with Alma online. For more information on the Alma Dublin Core - Template, see Alma Dublin Core.

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

- **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.

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**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.

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- **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 sources, 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, but you will need separate pipes for each source that Alma supports (MARC21 and DC). 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.

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**Note**

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

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3. Execute the publishing pipe.
4. Run indexing.
5. After configuring ongoing publishing in Alma, schedule a pipe for ongoing updates from Alma.
Configuring the Primo Front End for an Alma Data Source

Note

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

This section covers several topics related to the configuration of the Primo Front End, which allows Alma end users to discover and request Alma data and services.

For information on configuring how services, labels, and related records appear in Primo’s Get It and View It tabs, see Discovery Interface Display Logic.

This section includes:

- Creating a Primo View
- Removing the Locations Tab in the Classic UI
- Configuring Primo Delivery of Alma Data and Services
- Configuring Real-Time Availability
- Alma Multicampus Setup in Primo
- My Account
- A-Z List
- Citation Linker
- Direct Linking to the Resource Sharing Request Form
- Configuring Course Reserves in Primo
- Direct Linking to the Purchase Request Form
- Database Search

In a collaborative network implementing a Network Zone, also see Discovery in Collaborative Networks.
Creating a Primo View

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

The Views Wizard in the Primo Back Office defines the information that displays to end users in the Primo Front End. Primo views do not require specific configuration to support an Alma data source, but they must be connected to the Alma institution in Primo (see Configuring the Primo Institution). For details on how to create a Primo view, see Primo Views.

**Note**
Currently, Primo does not support a hybrid view of Alma and Voyager.
Removing the Locations Tab in the Classic UI

Note

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

To hide the Locations tab in the classic UI:

1. Log on to the Back Office server as the primo user.

2. Enter the following commands to access and open the CSS file that is used to customize your view:

   fe_web
cd css
vi <custom_CSS>.css

3. Add the following line to the CSS file:

   .EXLTabsRibbon div li.EXLLocationsTab {display:none}

4. Save the changes to the CSS file.

5. On the Primo Home > Deploy All page, select all options and select Deploy.

6. Perform a search to verify that the Locations tab does not appear in the view.

Note

It is not recommended to modify the default Primo CSS, which can be overwritten during updates. For more information regarding the customization of Primo views, see Customizing Primo's User Interface, The Standard Layout, Configuration Options, and New UI Customization.
Configuring Primo Delivery of Alma Data and Services

**Note**

If you are working with Primo VE, see [Primo VE Delivery Services](#) for more details.

Other than a few exceptions (such as changing labels and modifying the Online Resource delivery category), delivery to Alma has been configured out of the box and does not require any changes. Alma delivery requires the use of specific delivery templates. If you feel changes are necessary, consult with Ex Libris Support.

The following sections explain how Primo delivers Alma data and services. For a general explanation about delivery, see [The Delivery Section](#).

For records discovered in Primo, Alma offers the following service categories:

- **View It** – Displays links to full text or the online representation of the resource.
- **Get It** – Displays additional services related to the physical representation of the resources (such as providing request options for print items).

**Note**

The View It and Get It services can now be integrated with any third-party discovery system that is configured to use a SAML-based identity provider for both Alma and the discovery interface authentication. For detailed information, see [https://developers.exlibrisgroup.com/alma/integrations/discovery](https://developers.exlibrisgroup.com/alma/integrations/discovery).

Alma data sources provide delivery information for the following types of records, and Primo must be configured to display the Alma View It and Get It services for these types of records:

- **Local** – Alma records that are harvested and stored on your local Primo server.
- **Remote** – Records that are located via remote searches in Primo Central and MetaLib.

For both local and remote records, Primo sends an OpenURL request to Alma when an end user selects a delivery tab (View It or Get It) in the Primo Front End. For more information on the delivery tabs, see [Configuring Alma's Delivery System](#).

## Delivery Settings for Local Primo Records Harvested from Alma

Primo uses the following delivery categories for Alma records:

- **Alma-P** – Used for physical records.
- **Alma-E** – Used for electronic records.
- **Alma-D** – Used for digital records.
- **Alma-C** – Used for digital collections.

For standard publishing, Primo checks the INT field in the records that were harvested from Alma in order to assign one of
the above values to the delivery/delcategory (delivery category) field in the PNX record.

An exception to this rule occurs when the INT field is set to P and the record also includes an 856 field (which indicates that the record has an online representation). In this case, Primo sets the delivery/delcategory field in the PNX record to Online Resource, which indicates to the system to provide a link to the online resource via the 856 field instead of using Alma directly. This exception may occur if the migration from another ILS to Alma is not able to convert the records to electronic. To handle this scenario, it is necessary to modify the out-of-the-box settings. For more information, see Modifying the Online Resource Delivery Category.

For centralized publishing, Primo checks INST subfield b to assign a delivery/delcategory per institution.

The rules Primo uses to normalize the harvested records are defined in the Alma MARC - Template and Alma Dublin Core - Template templates. For more information about these templates, see Alma MARC 21.

**Modifying the Online Resource Delivery Category**

Out of the box, Primo uses the 856 link (which is normalized to the links/linktorsrc field in the PNX) as the basis for the main delivery option (GetIT 1) for online resources. It is necessary to change the default label for the Online Resource delivery code in the GetIT! Tab 1 Text Configuration mapping table to reflect the terminology used for Alma.

In addition, Primo configures the secondary delivery option (GetIt 2) to send the standard OpenURL template to Alma’s link resolver for online resources.

If you are working with Alma, you need to change the settings in the following mapping tables to request Get It services from Alma:

- GetIt! Tab 1 Text Configuration – Configures the code that determines the label used for the Get It 1 tab.
- GetIt! Tab 2 Text Configuration – Configures the code that determines the label used for the Get It 2 tab.
- GetIt! Link 2 Configuration – Configures the template that is used to build the OpenURL request, which is sent to Alma.

**To configure the online resource settings for Alma:**

1. Use the following table to modify the codes for each Online Resource delivery category in the GetIT! Tab 1 Text Configuration mapping table:

<table>
<thead>
<tr>
<th>Delivery Category Code</th>
<th>Availability Status Code</th>
<th>Tab 1 Label Code (Change)</th>
<th>Tab 1 Label Code (To)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Resource</td>
<td>may_be_restricted</td>
<td>tab1_onl_mayrestrict</td>
<td>alma_tab1_mayrestrict</td>
</tr>
<tr>
<td>Online Resource</td>
<td>restricted</td>
<td>tab1_onl_restrict</td>
<td>alma_tab1_restrict</td>
</tr>
<tr>
<td>Online Resource</td>
<td>not_restricted</td>
<td>tab1_onl_norestrict</td>
<td>alma_tab1_norestrict</td>
</tr>
</tbody>
</table>

2. Use the following table to modify the codes for each Online Resource delivery category in the GetIT! Tab 2 Text Configuration mapping table:
3. Use the following table to modify the codes for each Online Resource delivery category in the GetIT! Link 2 Configuration mapping table:

<table>
<thead>
<tr>
<th>Delivery Category Code</th>
<th>Availability Status Code</th>
<th>Link field in PNX (Change)</th>
<th>Link field in PNX (To)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Resource</td>
<td>may_be_restricted</td>
<td>tab2_onl_mayrestrict</td>
<td>alma_tab2_mayrestrict</td>
</tr>
<tr>
<td>Online Resource</td>
<td>restricted</td>
<td>tab2_onl_restrict</td>
<td>alma_tab2_restrict</td>
</tr>
<tr>
<td>Online Resource</td>
<td>not_restricted</td>
<td>tab2_onl_norestrict</td>
<td>alma_tab2_norestrict</td>
</tr>
</tbody>
</table>

Note

Alma collections do not provide availability status.

Out-of-the-Box Delivery Settings for Local Alma Records

The tables below summarize the out-of-the-box settings in the Primo mapping and code tables to support the Alma delivery categories (Alma-P, Alma-C, Alma-D, and Alma-E). You can modify these settings as needed.

The following table describes the Alma-specific settings in the Delivery mapping tables:

<table>
<thead>
<tr>
<th>Mapping Table</th>
<th>Use</th>
<th>Delivery Category / Availability Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>GetIt Link 1 Configuration</td>
<td>Defines the main delivery option (Get It 1)</td>
<td>Alma-P / all statuses</td>
<td>The system uses the AlmaGetit template to request Get It services from Alma.</td>
</tr>
<tr>
<td>Mapping Table</td>
<td>Use</td>
<td>Delivery Category / Availability Status</td>
<td>Definition</td>
</tr>
<tr>
<td>---------------</td>
<td>-----</td>
<td>----------------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Alma-E and Alma-D / All statuses</td>
<td>The system uses the Almaviewit template to request View It services from Alma.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Alma-C / No status</td>
<td>The system uses the linktocollection template to display the collection in the Collection Lobby.</td>
</tr>
</tbody>
</table>

GetIt! Tab 1 Text Configuration

Defines the codes for the label of the GetIt 1 tab. The text is defined in the GetIt! Tab 1 code table.

<table>
<thead>
<tr>
<th>Use</th>
<th>Delivery Category / Availability Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Alma-P, Alma-E, Alma-D / All statuses</td>
<td>Every delivery category/status has a separate code. See the mapping rows in this mapping table for details.</td>
</tr>
<tr>
<td></td>
<td>Alma-C / No status</td>
<td>The system uses the linktocollection code.</td>
</tr>
</tbody>
</table>

GetIt! Link 2 Configuration

Defines the secondary delivery option (Get It 2).

<table>
<thead>
<tr>
<th>Use</th>
<th>Delivery Category / Availability Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Alma-P / All statuses</td>
<td>No additional delivery option is defined. All Alma services are offered via Get It. You can add a local definition if an additional delivery option is needed.</td>
</tr>
<tr>
<td></td>
<td>Alma-E and Alma-D / All statuses</td>
<td>The system uses the Almagetit template to request additional services from Alma.</td>
</tr>
</tbody>
</table>

GetIt Tab 2 Text Configuration

Defines the codes for the label of the GetIt 2 tab. The text is defined in the code tables.

<table>
<thead>
<tr>
<th>Use</th>
<th>Delivery Category / Availability Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Alma-E and Alma-D / All statuses</td>
<td>Every delivery category/status has a separate code. See the mapping table for details.</td>
</tr>
</tbody>
</table>

---

**Note**

All of the templates mentioned in the above table are defined in the Templates mapping table under the Delivery subsystem.

The following table describes the Alma-specific settings in the Delivery code tables:

<table>
<thead>
<tr>
<th>Code Table</th>
<th>Use</th>
<th>Delivery Category</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>GetIt! Tab 1</td>
<td>Defines the label for the Get It 1 tab.</td>
<td>Alma-P</td>
<td>Get It</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Alma-E and Alma-D</td>
<td>View It</td>
</tr>
</tbody>
</table>
## Out-of-the-Box Delivery Settings for Remote Search Records

Records that Primo retrieves from Primo Central or MetaLib searches are assigned the **Remote Search Resource** delivery category. In order to support out-of-the-box configurations for both Alma’s link resolver and non-Alma link resolvers, the **Remote Search Resource:Alma** virtual delivery category provides a dedicated configuration for Alma in the delivery tables. If the user's institution is defined as an Alma institution, the system first checks the tables for the virtual delivery category.

The availability status for Primo Central records is based on information from Alma and loaded into Primo Central. For more information, see [Alma as a Source of Holdings Information for Primo Central](#). For records retrieved from MetaLib, Primo uses the Alma RSI API to check for full-text availability status.

The following table describes the out-of-the-box settings in the Delivery mapping tables for remote searches:

<table>
<thead>
<tr>
<th>Table</th>
<th>Use</th>
<th>Delivery Category / Availability Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>GetIt! Tab 2</td>
<td>Defines the label for the Get It 2 tab.</td>
<td>Alma-C</td>
<td>View Collection</td>
</tr>
<tr>
<td></td>
<td>Alma-P</td>
<td>No tab defined.</td>
<td></td>
</tr>
<tr>
<td>Alma-E and Alma-D</td>
<td>Get It</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Remote Mapping Table Configurations

<table>
<thead>
<tr>
<th>Table</th>
<th>Use</th>
<th>Delivery Category / Availability Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>GetIt Link 1 Configuration</td>
<td>Defines the main delivery option (Get It 1)</td>
<td>Remote Search Resource:Alma / fulltext</td>
<td>The system uses the <strong>Almaviewit_remote</strong> template to request View it services from Alma.</td>
</tr>
<tr>
<td></td>
<td>Remote Search Resource:Alma / fulltext_unknown</td>
<td>Note</td>
<td>If a title is configured to be a direct link to the online resource, the system uses the <strong>Almasingle_service_remote</strong> template.</td>
</tr>
<tr>
<td></td>
<td>Remote Search Resource:Alma / no_fulltext</td>
<td>The system uses the <strong>Almagetit_remote</strong> template to request Get It services from Alma.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Remote Search Resource:Alma / no_fulltext_linktorsrc</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Remote Search Resource:Alma /</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Table</td>
<td>Use</td>
<td>Delivery Category / Availability Status</td>
<td>Definition</td>
</tr>
<tr>
<td>--------------</td>
<td>----------------------------------------------------------------------</td>
<td>------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>GetIt! Tab 1</td>
<td>Defines the codes for the label of the GetIt 1 tab. The text is defined in the code tables</td>
<td>All</td>
<td>Every delivery category/status has a separate code. See mapping table for details.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Remote Search Resource:Alma / fulltext</td>
<td></td>
</tr>
<tr>
<td>GetIt! Link 2</td>
<td>Defines the secondary delivery option (Get It 2)</td>
<td>Remote Search Resource:Alma / fulltext</td>
<td>The system uses the Almagetit_remote template to request additional services from Alma.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Remote Search Resource:Alma / fulltext_linkedsrc</td>
<td></td>
</tr>
<tr>
<td>GetIt Tab 2</td>
<td>Defines the codes for the label of the GetIt 2 tab. The text is defined in the code tables.</td>
<td>All</td>
<td>Every delivery category/status has a separate code. See mapping table for details.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Remote Search Resource:Alma / fulltext</td>
<td></td>
</tr>
</tbody>
</table>

**Note**

All of the templates mentioned in the above table are defined in the Templates mapping table under the Delivery subsystem.

The following table describes the Alma-specific settings in the Delivery code tables for remote searches:

<table>
<thead>
<tr>
<th>Code Table</th>
<th>Use</th>
<th>Delivery Category / Availability Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>GetIt! Tab 1</td>
<td>Defines the label for the Get It 1 tab.</td>
<td>Remote Search Resource:Alma / fulltext</td>
<td>View It</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Remote Search Resource:Alma / no_fulltext</td>
<td>Get It</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Remote Search Resource:Alma / citation_available</td>
<td></td>
</tr>
<tr>
<td>GetIt! Tab 2</td>
<td>Defines the label for the Get It 2 tab.</td>
<td>Remote Search Resource:Alma / fulltext</td>
<td>Get It</td>
</tr>
<tr>
<td>Code Table</td>
<td>Use</td>
<td>Delivery Category / Availability Status</td>
<td>Definition</td>
</tr>
<tr>
<td>------------</td>
<td>-----</td>
<td>----------------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Remote Search Resource:Alma / citation_available</td>
<td></td>
</tr>
</tbody>
</table>
Configuring Real-Time Availability

Note

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

Return to menu

Primo uses real-time availability to ensure that the status of physical items is current. Alma has an API that enables Primo to check the status in real time. For more information about real-time availability, see Real-Time Availability.

Note

For Alma consortia, real-time availability is initially performed only for items that belong to the view's default institution. Availability from other institutions is updated when users either select the Get It tab in the classic UI or display the record's full details in the new UI. In addition, availability is updated in the brief display.

This section explains how to configure real-time availability in Primo for use with Alma.

To configure real-time availability for Alma:

1. Update the Locations tile in the Views Wizard to enable RTA in the Brief Results and full display.

   ![Locations Tile in the Views Wizard - Enable RTA](image)

2. Make sure that the RTA URL field is defined correctly on the Primo Home > Ongoing Configuration Wizards > Institution Wizard page.
3. On the **Advanced Configuration > General Configuration Wizard** page, select the **RTA** subsystem, type `normalization_rules` in the **RTA method for mapping data** field, and then select **Save & Continue**.

4. On the **Advanced Configuration > All Mapping Tables** page, select the **Adaptors** subsystem and edit the **RTA Adaptors table**.

5. Enable the **Alma** adaptor and then select **Save**.

7. Enable the Alma source system, configure the following fields, and then select Save:
   ◦ Mapping Set Name – Type the name of the normalization rules set.
   ◦ Data Source Code – Type the code of the Alma data source.
   ◦ Active Y/N – Select this field to activate the normalization rules.

### RTA Adaptors Mapping Table - Enabling the Alma Adaptor

To check real-time availability results from Alma:

1. Use the following URL to access the Front End that is used for Alma:
   
   ```
   ```

2. Perform a search to verify that the availability statuses are updating correctly in the brief and full displays.
Alma Multicampus Setup in Primo

Note

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

Setup

In Alma, electronic resources can be managed at the campus or library level. If there are significant differences between campuses or libraries in terms of electronic resource subscriptions, you should consider creating a separate Primo institution per Alma campus/library. This will ensure that every campus/library has its own Primo Central profile and that availability is relative to the campus. For information regarding multicampus setup in Alma, see Configuring Distributed Access to Electronic Resources and Defining Display Logic Rules at the Campus Level.

Institution Wizard

If you are defining an institution per campus/library in Primo, you must configure the following information in the Institution Wizard (Primo Home > Ongoing Configuration Wizards > Institution Wizard):

- For each Primo institution, the Alma campus code must be specified in the Alma Campus Code field. The system uses this field for non-openURL functionality (such as for the Services Page, MetaLib, and the EBSCO API).

Primo automatically stores the Alma campus code in the Alma Institution Campus Codes mapping table. The Alma institution and campus codes are separated by a colon and mapped to a Primo institution. For example:

<table>
<thead>
<tr>
<th>Alma Institution Code/Campus Code</th>
<th>Primo Institution Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>01MY_INST:NORTH</td>
<td>North Campus</td>
</tr>
<tr>
<td>01MY_INST:SOUTH</td>
<td>South Campus</td>
</tr>
</tbody>
</table>

This mapping table cannot be viewed or edited, but you are permitted to reference it from the normalization rules (see Normalization Rules for more information). The mapping table is hidden from view because the campus codes should be entered using the Institution Wizard only.

Note

When referencing this table from the normalization rules, the system converts the Primo institution name to the
Primo institution code.

- The Alma campus code must be appended to the base URL as follows:

  \[ \text{http://<Alma domain>/view/uresolver/<Alma institution code>/openurl-<Alma campus code>} \]

  For example:

  ![Delivery Base URLs](image)

  **Physical Holdings**

  Consider splitting physical holdings per campus so that the availability status that displays following RTA is applicable to the campus. If this is done, every campus-institution should have its own list of Primo libraries defined in the Institution Wizard.

  **Views**

  You may want to create a Primo view per campus. This will ensure that the Primo Central profile and full text availability is always relative to the campus when users do not sign in.

  **Normalization Rules**

  Because the out-of-the-box normalization rules create the delivery/institution field from the MARC INST field, you must update the rules to create a delivery/institution field for each of the institution’s campuses. In multicampus configurations, the institution (subfield $$i$$) and campus (subfield $$c$$) information is populated in the MARC AVE field. The normalization rules can be implemented in different ways. One option is to use the Alma Institution Campus Codes mapping table to map the Alma institution and campus codes to a Primo institution code. For example:
In principle, the Alma multicampus configuration in which every campus becomes a Primo institution is for electronic material. In some cases, it makes sense to also divide the physical holdings per campus instead of per some kind of centralized institution or only one of the campuses. If you want to split your physical holdings per campus, you can create the delivery/institution field for physical records using the Alma library code in AVA $b$.

### Additional Mappings

The following table lists the out-of-the-box settings to the Primo mapping tables.

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Templates mapping table</td>
<td>The Alma campus code has been added to the following templates:</td>
</tr>
<tr>
<td></td>
<td>• almasesingle_services</td>
</tr>
<tr>
<td></td>
<td>• almagetit_services</td>
</tr>
<tr>
<td></td>
<td>• almaviewit_services</td>
</tr>
<tr>
<td></td>
<td>For example:</td>
</tr>
<tr>
<td></td>
<td>{{api_base}}/view/uresolver/{{alma_institution}}/openurl{{alma_campaign_</td>
</tr>
<tr>
<td></td>
<td>code}}?</td>
</tr>
<tr>
<td>ILS Adaptors Templates mapping table</td>
<td>The Alma campus code has been added to the following template:</td>
</tr>
<tr>
<td></td>
<td>• almasesingle_services</td>
</tr>
<tr>
<td></td>
<td>For example:</td>
</tr>
<tr>
<td></td>
<td>{{api_base}}/view/uresolver/{{institution}}/openurl{{alma_campaign_code}}?</td>
</tr>
</tbody>
</table>
My Account

Note
If you are working with Primo VE and not Primo, see Additional Library Card Configurations for Primo VE for more details.

The My Account page in Primo displays the end users’ Library Card information (such as loans, requests, fines, and so forth) from Alma using the OPAC via Primo mechanism, which allows Primo to request information from Alma via the ILS Gateway and then display the information on the My Account page in Primo. For more information about how OPAC via Primo functions, see How OPAC via Primo Works.

As long as the Primo institution configuration includes the api_base base URL, Primo will invoke OPAC via Primo for the My Account functionality. For more information on configuring the institution, see Configuring the Primo Institution.

In addition, you can customize the information that displays on the My Account page (such as which fields appear in the detailed display of a loan or request). For more information, see Configuring OPAC via Primo.

When working with a Network Zone, a patron can view all of their accounts from My Account by selecting the institution at the bottom of the My Account menu. The current institution appears at the top of the menu.

Updating Patron Information

If permitted by Alma, the My Preferences section in My Account > Personal Settings allows patrons to update their personal information.

To allow users to update their patron information from Primo, set the primo_patron_info_updatable parameter to Y in the Customer Parameters table (Configuration Menu > General > General Configuration > Other Settings) in Alma.

<table>
<thead>
<tr>
<th>My Preferences</th>
<th>Address: Jerusalem</th>
<th>Chernichovsky str</th>
<th>340450459</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Israel</td>
<td>Zip:</td>
<td>10/28/2009</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Valid From:</td>
<td>11/27/2009</td>
</tr>
<tr>
<td></td>
<td>telephone 1:</td>
<td>23809</td>
<td></td>
</tr>
<tr>
<td></td>
<td>telephone 4:</td>
<td>89081</td>
<td></td>
</tr>
<tr>
<td></td>
<td>sms wanted:</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>sms number:</td>
<td>0509998887</td>
<td></td>
</tr>
<tr>
<td></td>
<td>my e-mail:</td>
<td><a href="mailto:test@test.com">test@test.com</a></td>
<td></td>
</tr>
</tbody>
</table>
Updating Self-Check Machine PINs

The Update Login Credentials section in My Account > Personal Settings allows Alma users to retrieve, display, and modify their PIN and password.

The following restrictions apply:

- Password updates are limited to collaborative network users (patrons who are not associated with the institution but can receive fulfillment services from it).
- PIN updates are only allowed for Alma environments that use PINs (Authentication required is set to Yes in the self-check machine integration profile - see Self-Check Machines) and have the use_pincode_for_selfcheck_machine parameter set to true in the Customer Parameters table (Configuration Menu > Resources > General > Other Settings) in Alma.

Note

If not permitted by Alma, some or all of the login credential fields may not display in My Account > Personal Settings.
Paying Fines and Fees

Alma allows users to pay fines and fees online using My Account. For Alma configuration information, see Configuring the WPM Education E-Payment System.

To pay fines and fees via Primo:

1. On the My Account > Fine & Fees tab in Primo, select the Pay Fine link above or below the list of fines.

2. On the WPM Education E-Payment System's Payments page, select the items to pay and select Continue.

3. On the WPM Education E-Payment System's Payment Method page, enter your credit card and billing address information and then select Continue.
4. On the WPM Education E-Payment System's Transaction Confirmation page, select **Confirm your transaction**.

Payment receipt emails are sent to the user shortly after processing completes in the WPM Education E-Payment System and Alma.
Configuring the Pay Fine Link

To allow users to pay fines online using My Account, you must configure the link to the WPM Education E-Payment System. For Alma configuration information, see Configuring the WPM Education E-Payment System.

To add the Pay Fine link:

1. On the Primo Home > Advanced Configuration page, select All Mapping Tables.

   The All Mapping Tables page opens.

2. Select Edit in the row containing the My Account Links mapping table.

   The My Account Links mapping table page opens.

3. In the Create a New Mapping Row section, enter the following fields and then select Create:
   
   ◦ View ID – Select the view.
   
   ◦ Link Code – Select fines.payfinelink.
   
   ◦ Order – Specify 1 to place the link next to the fines/fees balance in the title.
   
   ◦ Link URL – Specify the following link to Alma:

   https://<Alma domain>.alma.exlibrisgroup.com/view/FinesFeesPayment/<Alma institution code>/do?system=WPM&pds_handle={{pds_handle}}

   See Your Alma Domain Names. For example:

   https://university.alma.exlibrisgroup.com/view/FinesFeesPayment/01_UNI_INST/do?system=WPM&pds_handle={{pds_handle}}

4. Save and deploy your changes to the mapping table.
Disabling Paging for Request List APIs

Alma allows customers to utilize the paging feature provided by Primo in the My Account > Loans List. By default, Primo fetches loans in bulks. If the user has more loans than the configured bulk size, Primo displays the Show More Loans link at the bottom of the My Account > Loans List page, which allows the user to fetch an additional bulk.

If the user invokes the Renew or Renew All option before all loans have been fetched from Alma, Primo will replace the Show More Loans link with the Refresh List link, which allows the user to display the updated loans list from Alma.

If this functionality is disabled, all of the loans display on the My Account > Loans List page.

To disable paging in Primo:

1. On the Primo Home > Advanced Configuration page, select All Mapping Tables.
   The All Mapping Tables page opens.
2. Select Edit in the row containing the ILS Adaptors Templates table.
3. In the Service Name column, search for get_loans.
4. For each of the rows that contain an Alma Adaptor ID (such as ALMA_01), remove the text in shown in bold in the Call Template column:
   
   ```
   {{api_base}}/view/rest-dlf/patron/{{patron_id}}/circulationActions/loans?lang={{lang}}&view=brief&type={{type}}&institution={{ils_user_institution}}&noLoans={{noItems}}
   ```
5. Save and deploy your changes to the mapping table.

For additional configurations associated with paging, refer to the description of the Bulk Definition mapping table in Front End Subsystem.

Configuring the Sort Direction for List of Loans

The primo_loan_list_sorting customer parameter allows you to configure the direction in which loans are sorted in Primo My Account > Loans. By default, the loans are listed in descending order by due date. You may sort them in ascending order by due date if you prefer.

To configure other settings, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

To change the sort direction of the loans in My Account:

Set primo_loan_list_sorting to ascending or descending (see Configuring Other Settings). By default, the loans in the
list are sorted in descending order by due date.
For sites using Alma, Primo displays the e-Journal A-Z list using the records that were harvested from Alma via the regular publishing pipe. The link to the A-Z list is located on Primo’s main menu, which is defined on the Main Menu tile page in the Views Wizard, as shown below.

Main Menu Tile in Views Wizard (A to Z Link)

Note

If the above row has been removed, you can create a new row with the aoz label in order to create the aoz code. Remember to leave the URL field empty. Once the row has been added, you can change the label.

Primo uses the following PNX fields to create the e-Journal A-Z list for institutions that have Alma data:

- **search/searchscope** — Out of the box, the Alma MARC - Template template creates the A-Z search scope from the institution and only includes records that have the resource type set to Journal and the delivery category set to Alma-E or Online Resource to ensure that electronic journals are included only. The A-Z search scope values must be in the following format:

  AZ<institution code>

  To include additional resource types (for example, newspaper), add the following search/searchscope rules to your normalization rules:

  1. For standard publishing, the following rule is used when the delivery category is Alma-E:
2. For standard publishing, the following rule is used when the delivery category is **Online Resource**: 

A-Z Search Scope Rule (Alma-E) for Standard Publishing

---

**Rule group**: search_searchscope

**Source**: PNR, Delivery/Display category, Match Last

**Conditions logic**: True, And

**Condition 1 - Logic**: True

**Condition 1 - Source**: PNR, Delivery/Display category, Match Last

**Condition 2 - Logic**: True

**Condition 2 - Source**: PNR, DisplayType, Match Last

**Transformations**: Add to beginning of string, A-Z,

**Action**: ADD

---
3. For centralized publishing, the following rule is used when the delivery category is **Alma-E**:
4. For centralized publishing, the following rule is considered when the delivery category is **Online Resource**:

**A-Z Search Scope Rule (Alma-E) for Centralized Publishing**

<table>
<thead>
<tr>
<th>Transformation</th>
<th>Parameter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove Leading String</td>
<td>Alma-E</td>
</tr>
<tr>
<td>Add to beginning of string</td>
<td>AZ</td>
</tr>
</tbody>
</table>
5. Save the new rules, deploy the changes, reload the data, and then perform indexing and hot swapping.

- facets/atoz – Out of the box, the Alma MARC - Template template creates the A-Z facet that the system uses to search via the A-Z values list. The content of the facet should be the first character of the title that is normalized via a dedicated normalization table (A-Z Characters Transformations) by using the Assign To AZ List transformation. 
Citation Linker

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

Return to menu

The Citation Linker lightbox allows users to search for citations of type article, book, and journal via a form in order to view full text or request additional services (such as ILL).

![Citation Linker Lightbox - Journal Tab](image)

Note
Because Alma only supports the **Exact** precision option for title searches, the precision drop-down field does not appear in the lightbox for Alma users.

For information on configuring the Citation Linker, see Configuring the Citation Linker.

Note that in order to be able to search by Digital Object Identifier (DOI) in the Citation Linker you must have a **Resolver Augmentation** integration profile. This integration enables querying the CrossRef database using a DOI to obtain complete article-level metadata. For information on configuring this integration profile, see Alma Resolver Augmentation.

To use the Citation Linker to make a resource sharing request:

1. Select Citation Linker in the Primo Front End.
2. Enter the search information and select Go.

The results for the selected item display.

3. In the item’s results, select the Get It tab.

The available request links display in the Get It tab.
These links are displayed or hidden based on the display logic rules. For more information, see Adding Display Logic Rules.

4. Select the Resource sharing request link to display the Resource Sharing Request form in Primo.

For additional information regarding resource sharing, see the following topics:

- Resource Sharing Workflow
- Managing Resource Sharing Borrowing Requests
- Configuring Resource Sharing

5. Fill in the Resource Information and Delivery Information sections and select Request.

An acknowledgment appears in the Get It tab.

Request Acknowledgement Message
Direct Linking to the Resource Sharing Request Form

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

Primo allows you to create a direct link to the Resource Sharing form in Alma instead of using the Citation Linker page to access it.

Resource Sharing Request Form in Alma

Because the direct link option does not validate any policies (such as resource sharing limits or self ownership), it is recommended that you use the Citation Linker.

To add the Resource Sharing button to Primo’s Front End:

1. In the Primo Back Office, select Edit to your view in the Views Wizard (Primo Home > Ongoing Configuration Wizards > Views Wizard).

2. Continue to the Tiles Configuration page in the Views Wizard.

3. Select Home Page from the Page drop-down list to list the tiles associated with your view's home page.

4. Select Edit Tile in the row containing the Main Menu tile.

   The Edit Main Menu Attributes page opens.

5. In the Create new Label section, enter the following fields:
Label – Enter a display label for the Resource Sharing button. For non-PDS authentication methods, you must enter alma_rs_form. You can change the display label after the link has been created.

URL – Enter a URL to access the Resource Sharing form, using the following format:

For non-PDS authentication:

<alma_domain>/view/uresolver/<alma_institution_code>/openurl?svc_dat=getit&svc.profile=getit&directResourceSharingRequest=true&pds_handle={{pds_handle}}

For PDS authentication:


Link – Specify whether you want the results of the citation search to open in the current window or a new window/tab. The default value is current window.

6. Select Add.

7. Save and deploy your view.

The link should appear as follows in the main menu:

Mapping the OpenURL Form to The Resource Sharing Request Form

<table>
<thead>
<tr>
<th>Alma Form</th>
<th>Open URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Book Title</td>
<td>rft.btitle</td>
</tr>
<tr>
<td></td>
<td>If rft.btitle is empty, rft.title</td>
</tr>
<tr>
<td></td>
<td>If those are empty, rft.jtitle</td>
</tr>
<tr>
<td></td>
<td>Otherwise, rft.stitle</td>
</tr>
<tr>
<td>Journal Title</td>
<td>rft.jtitle</td>
</tr>
<tr>
<td></td>
<td>If rft.jtitle empty, rft.title</td>
</tr>
<tr>
<td></td>
<td>If those are empty, rft.stitle</td>
</tr>
<tr>
<td></td>
<td>Otherwise, rft.btitle</td>
</tr>
<tr>
<td>Article Title</td>
<td>rft.atitle</td>
</tr>
<tr>
<td>Author</td>
<td>If rft.au is not empty, contact, with each value separated by “;”</td>
</tr>
<tr>
<td></td>
<td>Otherwise, First rft.auinit + “,” (if exists rft.auinit) + first rft.aufirst</td>
</tr>
<tr>
<td>Author initials</td>
<td>If not empty rft.auinit with its values separated by ‘,’</td>
</tr>
<tr>
<td>Edition</td>
<td>rft.edition</td>
</tr>
<tr>
<td>Alma Form</td>
<td>Open URL</td>
</tr>
<tr>
<td>---------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Volume</td>
<td>MS field 245 subfield is empty 'n', if it doesn't exist, then use rft.volume</td>
</tr>
<tr>
<td>Issue</td>
<td>rft.issue</td>
</tr>
<tr>
<td>ISBN</td>
<td>rft.isbn</td>
</tr>
<tr>
<td>ISSN</td>
<td>rft.issn</td>
</tr>
<tr>
<td>LCCN</td>
<td>rft.lccn, but if empty, check if rft_id contain 'info:lccn/' and if so take it</td>
</tr>
<tr>
<td>OCLC Number</td>
<td>rft.oclcnum, but if empty, check if rft_id contain 'info:oclcnum/' and if so take it</td>
</tr>
<tr>
<td>DOI</td>
<td>rft.doi</td>
</tr>
<tr>
<td>PMID</td>
<td>rft.pmid</td>
</tr>
<tr>
<td>Publisher</td>
<td>rft.pub, but if empty use rft.publisher</td>
</tr>
<tr>
<td>Publication date</td>
<td>For journal and articles rft.date</td>
</tr>
<tr>
<td></td>
<td>For Book rft.pubdate, but if empty use rft.date</td>
</tr>
<tr>
<td>Place of publication</td>
<td>rft.place</td>
</tr>
<tr>
<td>Part</td>
<td>rft.part</td>
</tr>
<tr>
<td>Source</td>
<td>rfr_id</td>
</tr>
<tr>
<td>Pages to photocopy (page range from the start page to the end page)</td>
<td>rft.pages</td>
</tr>
<tr>
<td>Start Page</td>
<td>rft.spage</td>
</tr>
<tr>
<td>End Page</td>
<td>rft.epage</td>
</tr>
</tbody>
</table>
Configuring Course Reserves in Primo

### Introduction

Course reserve information is not published to Primo unless Alma is configured to publish course enrichment information (See the Course information enrichment parameter in Exporting Alma Records to Primo.). The course reserve information is defined in the MARC CNO field, which contains the following subfields:

- $$a$$ – Institution code
- $$b$$ – Start date
- $$c$$ – End date
- $$e$$ – Department code
- $$f$$ – Department name
- $$g$$ – Course instructors
- $$j$$ – Course name
- $$k$$ – Course code and section
- $$l$$ – Section ID
- $$o$$ – Searchable IDs
- $$r$$ – Course year

For example:

```xml
<datafield tag="CNO" ind1="" ind2=""/>
  <subfield code="a">01TRAINING_INST</subfield>
  <subfield code="b">201412150317+-317</subfield>
  <subfield code="c">201503310217+-217</subfield>
  <subfield code="e">Fine Arts</subfield>
```
Primo’s normalization rules map the above information from Alma to provide the following functionality in the Primo Front End:

- Display course information in the brief and full display of an item
- Create a search scope for course reserves
- Create search indexes for course reserves
- Create facets for course reserves

The following figure shows the integration of the course reserve information in Primo.

![Primo integration figure]

**Course Reserves Enabled in the Front End**

For more details on the CNO field and publishing to Primo, see the following sections: The Format of Published Data and Publishing to Primo.

---

**More from the Same Course**

The More from the same Course section on the Full Display page allows users to expand the search of the current title to
other items in the course and in additional courses that also contain the current title.

More from the Same Course Section

The top half of this section lists all courses to which this title belongs. A maximum of six courses display initially. Users can select the View all courses icon to view the remaining courses. If the course is associated with Leganto, users can select the course to view its reading list in Leganto.

The bottom half of this section allows users to browse items that belong to the item’s related courses. Users can select any of the following:

- the Previous/Next arrows to scroll through the list of items
- an item in the list to open its Full Display.

Configuration Options

The following table lists the settings used to configure this functionality.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Views Wizard</td>
<td>To enable this functionality in the new Primo UI, select the following field in the General section of the Views Wizard: <strong>More from the same Course</strong>.</td>
</tr>
<tr>
<td>Aria Labels</td>
<td>The following code was added to support accessibility for this functionality:</td>
</tr>
<tr>
<td></td>
<td>• default.nui.aria.moreFromTheSame.collection.tab: Navigate to More From The Same Collection</td>
</tr>
<tr>
<td>GetIT! Tab1 code table</td>
<td>The following codes were added to support this functionality:</td>
</tr>
<tr>
<td></td>
<td>• default.nui.brief.results.tabs.moreCourse: More from the same Course</td>
</tr>
<tr>
<td></td>
<td>• default.nui.brief.results.tabs.courseTab: Course</td>
</tr>
<tr>
<td></td>
<td>• default.nui.brief.results.tabs.expandCourses: View all courses</td>
</tr>
<tr>
<td>Normalization Rules</td>
<td>In the Alma MARC Template and Alma UNIMARC Template normalization rule templates, the course information is now mapped to following subfields in the display/crsinfo field, but it will not display in the Primo UI:</td>
</tr>
<tr>
<td></td>
<td>• $$R – The course code and section are mapped from CNO $$k.</td>
</tr>
</tbody>
</table>
Element Description

- $$N$$ – The course section ID is mapped from CNO $$s$$.
- $$M$$ – The course name is mapped from CNO $$j$$.

Note
To include the correct linking information on the Full Display page, make sure that you map the following search fields instead of using local search fields for course information: crsinfo, crsname, crsinstrc, crsid and crsdept.

Linking to Leganto

When enabled this functionality improves the integration between Primo and Leganto by allowing users to select a course link from a record's full display and view the relevant reading list in Leganto.

Course Links in Full Display

Configuration Options

This feature is disabled by default. The following table lists the configuration options associated with this functionality.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Views Wizard</td>
<td>The following field on the Edit Full Details Attributes page in the Views Wizard enables the linking from the Course Information field in the record's full details: <strong>Enable Linking the Course Information to Leganto.</strong></td>
</tr>
</tbody>
</table>
| Templates mapping table | The following code creates the links to Leganto for Alma customers:  
  - leganto_url – {{alma_base}}/leganto/public/{{alma_institution}}/lists?courseCode={{course_code}}&primo=true |
| Normalization Rules | In the Alma MARC Template and Alma UNIMARC Template normalization rule templates, the course information is now mapped to following subfields in the display/crsinfo field, but it will not display in the Primo UI:  
  - $$R$$ – The course code and section are mapped from CNO $$k$$. |
• $$N$$ – The course section ID is mapped from CNO $$N$$.
• $$M$$ – The course name is mapped from CNO $$M$$.

## Primo Back Office Configuration

The PNX and normalization rules are available out of the box with Primo, but you will need to make sure that you have included the course reserve rules to your local normalization rules.

## PNX Configuration

The following table lists the fields that are used to map course reserve data from Alma:

### New PNX Fields for Course Reserves

<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display</td>
<td>Course info</td>
<td>crsinfo</td>
</tr>
<tr>
<td>Facets</td>
<td>Course name</td>
<td>crsname</td>
</tr>
<tr>
<td></td>
<td>Course instructor</td>
<td>crsinstrc</td>
</tr>
<tr>
<td></td>
<td>Course ID</td>
<td>crsid</td>
</tr>
<tr>
<td></td>
<td>Course department</td>
<td>crsdept</td>
</tr>
<tr>
<td>Search</td>
<td>Course name</td>
<td>crsname</td>
</tr>
<tr>
<td></td>
<td>Course instructor</td>
<td>crsinstrc</td>
</tr>
<tr>
<td></td>
<td>Course ID</td>
<td>crsid</td>
</tr>
<tr>
<td></td>
<td>Course department</td>
<td>crsdept</td>
</tr>
</tbody>
</table>

### Note

If you want the display fields to appear in your search results, you must modify your view in the Views Wizard.

## Code Table Configuration

The following table lists the codes that are defined in the code tables under the Front End subsystem to support course reserve information:
### New Codes in Facet Labels Code Table

<table>
<thead>
<tr>
<th>Code Table</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Facet Labels</strong></td>
<td>facets.facet.facet_crsname</td>
<td>Course name</td>
</tr>
<tr>
<td></td>
<td>facets.search-box.facet_crsname</td>
<td></td>
</tr>
<tr>
<td></td>
<td>facets.facet.facet_crsinstruct</td>
<td>Course instructor</td>
</tr>
<tr>
<td></td>
<td>facets.search-box.facet_crsinstruct</td>
<td></td>
</tr>
<tr>
<td></td>
<td>facets.facet.facet_crsid</td>
<td>Course ID</td>
</tr>
<tr>
<td></td>
<td>facets.search-box.facet_crsid</td>
<td></td>
</tr>
<tr>
<td></td>
<td>facets.facet.facet_crsdept</td>
<td>Course department</td>
</tr>
<tr>
<td></td>
<td>facets.search-box.facet_crsdept</td>
<td></td>
</tr>
<tr>
<td><strong>Facets Code Fields</strong></td>
<td>facet_crsname</td>
<td>Course name</td>
</tr>
<tr>
<td></td>
<td>facet_crsinstruct</td>
<td>Course instructor</td>
</tr>
<tr>
<td></td>
<td>facet_crsid</td>
<td>Course ID</td>
</tr>
<tr>
<td></td>
<td>facet_crsdept</td>
<td>Course department</td>
</tr>
<tr>
<td><strong>Advanced Index Fields and Basic Index Fields</strong></td>
<td>crsname</td>
<td>Course name</td>
</tr>
<tr>
<td></td>
<td>crsinstrc</td>
<td>Course instructor</td>
</tr>
<tr>
<td></td>
<td>crsid</td>
<td>Course ID</td>
</tr>
<tr>
<td></td>
<td>crsdept</td>
<td>Course department</td>
</tr>
<tr>
<td><strong>FrontEnd Display Fields</strong></td>
<td>crsinfo</td>
<td>Course Information</td>
</tr>
<tr>
<td><strong>Full Display Labels</strong></td>
<td>fulldisplay.crsinfo</td>
<td>Course Information</td>
</tr>
</tbody>
</table>

### Normalization Rules

The following rules are included in the Alma MARC normalization rules template to allow the mapping of course reserve information. For additional normalization rules, see [Configuration Options](#).

- **Display Section:**

  A rule concatenates the crsid, crsname, crsdept, and crsinstrc fields into the crsinfo field using the following format:

  \[
  \text{<course ID>} : \text{<course name>} ; \text{<course department> ; <course instructor>}
  \]

  For example:
**Facets Section:**

The following tables lists the rules that map course reserve information to the Facets section of the PNX:

<table>
<thead>
<tr>
<th>Field</th>
<th>Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>facet/Course name</td>
<td>Retrieve data from MARC CNO field subfield j</td>
</tr>
<tr>
<td></td>
<td>Transformation: Copy as is</td>
</tr>
<tr>
<td></td>
<td>Retrieve data from MARC CNO field subfield j</td>
</tr>
<tr>
<td></td>
<td>Transformation: Copy as is</td>
</tr>
<tr>
<td>facet/Course instructor</td>
<td>Retrieve data from MARC CNO field subfield g</td>
</tr>
<tr>
<td></td>
<td>Transformation: Copy as is</td>
</tr>
<tr>
<td>facet/Course ID</td>
<td>Retrieve data from MARC CNO field subfield k</td>
</tr>
<tr>
<td></td>
<td>Transformation: Copy as is</td>
</tr>
<tr>
<td></td>
<td>Retrieve data from MARC CNO field subfield k</td>
</tr>
<tr>
<td></td>
<td>Transformation: Copy as is</td>
</tr>
</tbody>
</table>

**Search Section:**

The following tables lists the rules that map course reserve information to the Search section of the PNX:

<table>
<thead>
<tr>
<th>Field</th>
<th>Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>search/Course name</td>
<td>1. Retrieve data from MARC CNO field subfield j</td>
</tr>
<tr>
<td></td>
<td>Transformation: Copy as is</td>
</tr>
<tr>
<td></td>
<td>2. Retrieve data from MARC CNO field subfield j</td>
</tr>
<tr>
<td></td>
<td>Transformations: Delete spaces + Remove Punctuation</td>
</tr>
<tr>
<td>search/Course instructor</td>
<td>Retrieve data from MARC CNO field subfield g</td>
</tr>
<tr>
<td></td>
<td>Transformation: Copy as is</td>
</tr>
<tr>
<td>search/Course ID</td>
<td>1. Retrieve data from MARC CNO field subfield k</td>
</tr>
<tr>
<td></td>
<td>Transformation: Copy as is</td>
</tr>
<tr>
<td></td>
<td>2. Retrieve data from MARC CNO field subfield k</td>
</tr>
<tr>
<td></td>
<td>Transformation: Delete spaces</td>
</tr>
<tr>
<td></td>
<td>3. Retrieve data from MARC CNO field subfield k</td>
</tr>
<tr>
<td></td>
<td>Transformation: Remove punctuation</td>
</tr>
<tr>
<td></td>
<td>4. Retrieve data from MARC CNO field subfield k</td>
</tr>
<tr>
<td></td>
<td>Transformations: Delete spaces + Remove Punctuation</td>
</tr>
<tr>
<td>Field</td>
<td>Rule</td>
</tr>
<tr>
<td>-----------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>search/Course department</td>
<td>Retrieve data from MARC CNO field subfield I</td>
</tr>
<tr>
<td></td>
<td>Transformation: Copy as is</td>
</tr>
<tr>
<td>search/searchscope</td>
<td>Retrieve data from MARC CNO field subfield a</td>
</tr>
<tr>
<td></td>
<td>Transformations:</td>
</tr>
<tr>
<td></td>
<td>Use Mapping table: Alma Institution Codes</td>
</tr>
<tr>
<td></td>
<td>Add to end of string: _CR</td>
</tr>
</tbody>
</table>

**Note**
- The new search scope will be <institution>_CR.
- Records will be added to search scope when MARC CNO field data exists.
Direct Linking to the Purchase Request Form

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

Primo allows you to create a direct link to the Purchase Request form in Alma instead of using the Citation Linker page to access it. For more information about purchase requests, see Purchase Requests.

To add the Purchase Request button to Primo’s Front End:

1. In the Primo Back Office, select Edit to your view in the Views Wizard (Primo Home > Ongoing Configuration Wizards > Views Wizard).
2. Continue to the Tiles Configuration page in the Views Wizard.
3. Select Home Page from the Page drop-down list to list the tiles associated with your view's home page.
4. Select Edit Tile in the row containing the Main Menu tile.
5. In the Create new Label section, enter the following fields:
   - Label – Enter a display label for the Purchase Request button.
   - URL – Enter a URL to access the Purchase Request form, using the following format:
     For non-PDS authentication:
     <alma_domain>/view/uresolver/<alma_institution_code>/openurl?svc_dat=getit&svc.profile=getit&directPurchaseRequest=true&pds_handle={{pds_handle}}
     For PDS authentication:
     <pds_url>?func=sso&url=<alma_domain>/view/uresolver/<alma_institution_code>/openurl?svc_dat=getit&svc.profile=getit&directPurchaseRequest=true
   - Link – Specify whether you want the results of the citation search to open in the current window or a new window/tab. The default value is current window.
6. Select Add.
7. Save and deploy your view.

The link appears in the main menu:
Database Search

Introduction

The Database Search page (new Primo UI only) allows users to search for databases or to browse for databases that start with either a number (0-9), a letter (A-Z), or another non-Latin character (OTHERS). The Languages drop-down list allows you to specify the language of the links listed below the search box. For configuration information, see General Configuration.

The maximum number of results per page is 20 (which is not configurable), and each result contains the following information: title, publisher, date, description, availability, and actions (such as Citation and Email).

Note

Unlike Primo VE, Primo does not provide auto-complete suggestions for databases enabled in Alma.

Browse Databases by Category

When configured (see Assigning Categories to the Database Records), the Database Search page allows users to display a list of databases by clicking specific categories and subcategories, up to three levels.
When the Database Search page opens, the categories display the first category level only. Users can select the 

icon to display the category’s next level.

### General Configuration

The following table describes the general Back Office settings that support the Database Search page.

<table>
<thead>
<tr>
<th>Configuration Options for Database Search</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Element</strong></td>
</tr>
<tr>
<td>Normalization rules</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
The following rule for the facets/atoz field creates the A-Z facet that the system uses to search via the A-Z values list. The content of the facet should be the first character of the title that is normalized via a dedicated normalization table (A-Z Characters Transformations) by using the Assign To AZ List transformation.

Add Search Scope Rule

- The following rule for the facets/atoz field creates the A-Z facet that the system uses to search via the A-Z values list. The content of the facet should be the first character of the title that is normalized via a dedicated normalization table (A-Z Characters Transformations) by using the Assign To AZ List transformation.

Add Rule for Facet

Defines the Database Search link that displays on the Main menu in the new UI.

The following codes configure the display labels associated with Database Search:

- default.nui.databaserequest.title: **Database Search**
- default.nui.databaserequest.searchbox.helpabcChecked: **Letter (0) is chosen. Presents titles starting with (0)**
- default.nui.databaserequest.searchbox.help: **Search titles starting with (0)**
- default.nui.databaserequest.searchbox.help: **Enter database name**
### Database Category Configuration

#### Assigning Categories to the Database Records

This feature requires you to apply database categories, which can contain up to three category levels, to the bibliographic records of your local databases.

**To assign categories to your local database records:**

1. In Alma, choose a local bibliographic field (for example, select any 6XX or 9XX field for MARC21) in which to store the database categories in your local bibliographic records, and then enter that field in the `db_categories_field` parameter on the Alma Customer Parameters page (Configuration Menu > Resources > General > Other Settings).

   **Note**

   Administrators will need one of the following roles to update the above parameter:

   - Catalog Administrator
   - Repository Administrator
   - General System Administrator

2. For each local database, use the Metadata Editor (Resources > Cataloging > Open Metadata Editor) to add the chosen MARC field with the following subfields to assign up to three category levels: $$a$$ (level 1), $$b$$ (level 2), and $$c$$ (level 3). For example:

   ```
   699 ##$$aEducation $bMedical $cFitness
   699 ##$$aEducation $bHealth
   ```

   **Note**

   As shown in the example above, a database can belong to more than one category/subcategory.
3. Wait for the **Creates DB Categories File** job (Admin > Monitor Jobs > Scheduled tab) under the **Discovery** filter to update the record's categories for discovery in Primo. This job is scheduled to run daily.

4. Edit your normalization rules set in Primo, update the new facets/dbcategory rule to map the category information from the source records to Primo, and then deploy your changes to the Front End (Primo Home > Advanced Configuration > Full Normalization Rule Configuration). Note that you must include the subfield delimiter (U+2500).

For example:

![Image](https://example.com/image.png)

**Update Facets/dbcategory Normalization Rule from Alma MARC Template**

5. In the Institution Wizard (Primo Home > Ongoing Configuration Wizard > Institution Wizard), enter the same value that you used for the API base URL in the new DB Category field under the Delivery Base URLs section.

![Image](https://example.com/image.png)

**DB Category Base URL in the Institution Wizard**

**Note**

You can clear this field if you want to disable categories in the view.

6. Run a regular pipe and then re-index to see the database categories on the Database Search page in the new Primo UI.
Customizing the Display Labels

The following codes have been added to the new DB Search code table (Primo Home > Advanced Configuration > All Code Tables > Front End subsystem) to support the new display text on the Database Search page:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>default.dbcategories.databases</td>
<td>Search for databases</td>
</tr>
<tr>
<td>default.dbcategories.description</td>
<td>To search for databases you can do the following:</td>
</tr>
<tr>
<td>default.dbcategories.option1</td>
<td>Enter keywords in the search box.</td>
</tr>
<tr>
<td>default.dbcategories.option2</td>
<td>Click on a letter above.</td>
</tr>
<tr>
<td>default.dbcategories.option3</td>
<td>Browse databases by category.</td>
</tr>
<tr>
<td>default.dbcategories.results</td>
<td>databases found for</td>
</tr>
<tr>
<td>default.dbcategories.title</td>
<td>Databases by category</td>
</tr>
</tbody>
</table>

Creating Translations for Categories

In addition to the labels that appear on Database Search page, the DB Search code table allows you to translate your categories to other languages.

The display label that appears for a category and its translations is based on the value mapped from the MARC subfield. To specify a different display value or provide a translation for a category, you must create a row definition for each language:

- **Code** – Specify the value of the MARC subfield that is to be mapped from the source record. Make sure that each space in the mapped value is converted to an underscore (_). For example, if your category is Medicine & Technology, the value of this field should be set to `default.dbcategories.Medicine&_Technology`.

- **Description** – Specify the value of the category/translation that you want to display. For example, if you are creating the Spanish translation for Medicine & Technology, specify Medicina y Tecnologia.

- **Language** – Specify the browser language for which the translation will appear.
English and Spanish Display Labels for Category

### Note

If a row definition does not exist, Primo will display the value from the MARC subfield.
Configuring the Primo Front End for Alma’s Link Resolver

**Note**

If you are working with Primo VE, see [Primo VE](#) for more details.

This section includes:

- [Introduction to Configuring the Primo Front End for Alma’s Link Resolver](#)
- [Base URL for the Services Page](#)
- [Description of the Services Page](#)
- [Configuring Delivery for the Services Page](#)
- [Configuring the OpenURL Link Action](#)
Introduction to Configuring the Primo Front End for Alma's Link Resolver

Note

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

As a link resolver, Alma provides services for searches performed in sources other than Alma. Alma’s link resolver uses the Services Page view (which is defined in Primo) in order to display these services. This view is based on the standard Primo view. Customers should copy the out-of-the-box Services Page view and create their own Services Page view.

Alma uses the following process (see Alma Services Page Process Flow) to display services to end users:

1. An end user performs a search in a source and requests services.
2. The source sends an OpenURL request to Primo. For more information, see Base URL for the Services Page.
3. Primo modifies the incoming request and forwards it to Alma. If an Alma campus is defined per Primo institution, Primo will include the Alma campus code in the request to Alma.
4. Alma processes the request and determines the possible services, as follows:
   - If there is a single link to full text, Alma sends Primo the link, and then Primo displays the full text in the View It tab on the Services Page for the end user.
   - If there are several full-text options or no full text, Alma sends Primo an XML response with the possible services, and then Primo displays these services in their respective delivery tabs on the Services Page for the end user.

Alma Services Page Process Flow

The following sections describe how to configure the Services Page in Primo.

- Base URL for the Services Page
- Description of the Services Page
• Configuring Delivery for the Services Page
In order for third-party sources to display Alma services via Primo, you must instruct the sources to send a base URL in the following format to Primo:

http://<Primo_domain>/openurl/<Primo_institution_code>/<Primo_view_code>?

Where the base URL includes the following elements:

- **Primo_domain** – Specify the Primo Front End server and port. In the case of multiple FE servers, use the server that serves as the load balancer.

- **Primo_institution_code** – Specify the institution code used in Primo.

- **Primo_view_code** – Specify the code of your Services Page view.

For example:

http://primo2.prod.hosted.exlibrisgroup.com:1701/openurl/01MY_INST/MY_spview?

For new installations that go directly to the new Primo UI, instruct the sources to send a base URL in the following format to Primo:

https://<Primo_domain>/primo-explore/openurl?institution=<Primo_institution_code>&vid=<Primo_view_code>

Because there is no longer a need to have a dedicated Services page for the new Primo UI, use the code for your regular Primo view.

For example:

Description of the Services Page

Note

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

The Services page is a dedicated Primo page and provides a subset of the capabilities (such as suppressed Main menu links, Search section, and Details service) that the Full Display page provides in Primo.

Services Page (Classic Primo UI)

Unlike the Services page for the classic Primo UI, the Services page for the new UI does not require you to configure a separate view. In the following example, notice that tabs (such as View It and Get It) are no longer used and are replaced by service sections. For more details on configuring the new Primo UI, see Back Office Configuration for the New UI.

Services Page (New Primo UI)

The Services page includes the following elements:
• Header
• Top-right menu – Includes e-Shelf, Sign in and My Account links.
• Main Menu – Includes the Language drop-down list.
• Brief record display
• Availability status
• Tabs – the following tabs and options display in the brief and full displays:
  ◦ View It and Get It tabs – Depending on the delivery configuration, one or both of these tabs display as needed per record. For more information, see Configuring Delivery for the Services Page.
  ◦ Details tab (classic UI only) – Primo creates a PNX record from the metadata sent from Alma.
  ◦ Recommendations tab – Displays if there are any recommendations. For information on configuring bX in Primo, refer to the bX Recommendations.

Note
In your bX My Profile, you must configure bX to use Alma’s link resolver. For more information, see Link Resolver Base URL.

◦ Send-to options – Displays per record.

• Footer

The following standard Primo elements are not included with the Services Page:
• The following links in Main Menu: Library Search, Tags, A-Z, and Help.
• Search box
• Reviews and Tags tab
• Links back to the results list and next/previous links

Out of the box, Primo provides a Services Page view that should be used as a template to copy and create your own Services Page view. The following table lists various elements in the Views Wizard and indicates whether the element is applicable to views that are used to display Alma services. For more information, see Views Wizard and Back Office Configuration for the New UI.

<table>
<thead>
<tr>
<th>Views Wizard Page</th>
<th>Element</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Attributes</td>
<td>All are relevant except for the following attributes:</td>
</tr>
<tr>
<td></td>
<td>• Enable My Library Card</td>
</tr>
<tr>
<td></td>
<td>• Personalized ranking</td>
</tr>
<tr>
<td></td>
<td>• Invoke automatic search</td>
</tr>
<tr>
<td></td>
<td>• Session timeout URL – When a session times out, the system uses the active services page view.</td>
</tr>
<tr>
<td>Views Wizard Page</td>
<td>Element</td>
</tr>
<tr>
<td>------------------</td>
<td>---------</td>
</tr>
<tr>
<td>Search scope list</td>
<td>Not applicable.</td>
</tr>
<tr>
<td>Tabs configuration</td>
<td>Not applicable.</td>
</tr>
<tr>
<td>Home Page &gt; Basic Search Tile</td>
<td>Not applicable.</td>
</tr>
<tr>
<td>Home Page &gt; Advanced Search</td>
<td>Not applicable.</td>
</tr>
<tr>
<td>Home Page - Main Menu</td>
<td>The Services Page does not display the out-of-the-box options, but you can add new ones.</td>
</tr>
<tr>
<td>Home Page &gt; Static HTML</td>
<td>The Services Page uses the Header and Footer static HTML files only.</td>
</tr>
</tbody>
</table>
| Brief Display > Brief Results | The Brief Display uses the following options:  
  • **Order of the Tabs** section  
  • **Link to full record display** field – This field indicates which tab should open by default. Only the GetIt Link 1 and Details options are applicable. The default selection for the Services Page is GetIt Link 1 (View It and Get It tabs). Note that this option is available only in Primo V4.1 and later releases.  
  • **Fields to display in lines 1, 2, and 3 of the brief results** |
| Brief Display > Refine My Results | Not applicable. |
| Brief Display > Locations | Not applicable. |
| Full Display > Full Results | All options are applicable. |
| Full Display > Send to | All options are applicable. |
Configuring Delivery for the Services Page

Note

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

Return to menu

When an end user selects a delivery tab (View It or Get It), Primo sends an OpenURL request to Alma to display the requested delivery information. In order to construct the OpenURL request for each tab, Primo uses the GetIt! Link mapping tables to map the Remote Search Resource delivery category and the available services status to either the almaviewit_services or almagetit_services template, as shown in the table below (which contains the out-of-the-box settings).

The following are the available service statuses:

- viewit_FT – View It services and full text are available.
- viewit_NFT – View It services are available, but there is no full text.
- getit – Get It services are available.
- viewit_getit_FT – View It services, Get It services, and full text are available.
- viewit_getit_NFT – View It and Get It services are available, but there is no full text.

Note

The View It and Get It services can be integrated with any third-party discovery system that is configured to use a SAML-based identity provider for both Alma and the discovery interface authentication. For detailed information, see https://developers.exlibrisgroup.com/alma/integrations/discovery.

### Delivery Configuration Mapping Tables

<table>
<thead>
<tr>
<th>Mapping Table</th>
<th>Use</th>
<th>Delivery Category / Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>GetIt Link 1</td>
<td>Defines the main delivery option (Get It 1).</td>
<td>Remote Search Resource / viewit_FT or viewit_NFT</td>
<td>The system uses the almaviewit_services template to request View It services from Alma.</td>
</tr>
<tr>
<td>Configuration</td>
<td></td>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>If the view is configured to link to the online resource on the Brief Results tile page in the Views wizard, the title is a direct link to the online resource. In this case, the system uses the almasingle_services template.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Remote Search Resource / getit</td>
<td>The system uses the almagetit_services template to request Get It services from Alma.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Remote Search</td>
<td>The system uses the almaviewit_services template to request View It services from Alma.</td>
</tr>
<tr>
<td>Mapping Table</td>
<td>Use</td>
<td>Delivery Category / Status</td>
<td>Definition</td>
</tr>
<tr>
<td>---------------</td>
<td>-----</td>
<td>-----------------------------</td>
<td>------------</td>
</tr>
<tr>
<td>GetIt! Tab 1 Text Configuration</td>
<td>Defines the codes used for the label of the GetIt 1 tab. The text is defined in the code tables.</td>
<td>Resource / viewit_getit_FT or viewit_getit_NFT</td>
<td>services from Alma.</td>
</tr>
<tr>
<td>GetIt! Link 2 Configuration</td>
<td>Defines the secondary delivery option (Get It 2).</td>
<td>Remote Search Resource / viewit_getit_FT or viewit_getit_NFT</td>
<td>The system uses the <strong>almagetit_services</strong> template to request Get It services.</td>
</tr>
<tr>
<td>GetIt Tab 2 Text Configuration</td>
<td>Defines the codes used for the label of the GetIt 2 tab. The text is defined in the code tables.</td>
<td>All</td>
<td>Every delivery category/status has a separate code. See this mapping table for details.</td>
</tr>
</tbody>
</table>

**Note**

All of the templates mentioned in the above table are defined in the Templates mapping table under the Delivery subsystem.

The following table describes the out-of-the-box settings in the Delivery code tables:

<table>
<thead>
<tr>
<th>Code Table</th>
<th>Use</th>
<th>Delivery Category / Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>GetIt! Tab 1</td>
<td>Defines label for the GetIt 1 tab.</td>
<td>Remote Search Resource / viewit_FT, viewit_getit_NFT, viewit_getit_FT, viewit_getit_NFT</td>
<td>View It</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Remote Search Resource / getit</td>
<td>Get It</td>
</tr>
<tr>
<td>GetIt! Tab 2</td>
<td>Defines label for GetIt 2 tab.</td>
<td>Remote Search Resource / viewit_getit_FT, viewit_getit_NFT</td>
<td>Get It</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Remote Search Resource / getit, viewit_FT, viewit_NFT</td>
<td>Not defined</td>
</tr>
</tbody>
</table>
Configuring the OpenURL Link Action

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

Alma users can use the Link action in the Actions drop-down list in the Primo search results and the e-Shelf to create an OpenURL link for a record returned in the Alma Services page. This URL can then be copied and used to re-access the Alma Services Page.

Link Action in Actions Drop-Down List

This action opens the Link dialog box, which displays OpenURL to the record. The user can select the URL and then copy and paste it to wherever it is needed.

Back Office Configuration

This functionality does not require any additional configuration, but it may be customized or disabled. The following table lists the related Back Office configuration for this enhancement.

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keeping this item Tile code table</td>
<td>The following codes allow you to modify the title that displays in the Link OpenURL dialog box, the name of the option that appears in the Actions drop-down list, and the tool-tip, respectively:</td>
</tr>
<tr>
<td>Table</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>CSS</td>
<td>Out of the box, the Actions menu displays the Link option on the Alma Services page. You can disable this option by appending <code>display: none;</code> to the following line in your localized CSS file:</td>
</tr>
</tbody>
</table>

```
.EXLTabHeaderButtons ol.EXLTabHeaderButtonSendToList li.EXLButtonSendToOpenUrl
{display: none;}
```
Configuring Alma’s Delivery System

Note

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

Although Primo displays the delivery information in the delivery tabs (Get It and View It), Alma determines the contents and style of the information, and sends the information when requested. The following sections describe the delivery tabs and how to configure various aspects of Alma’s delivery system.

This section includes:

- Primo View It
- Primo Get It
- Modifying Display Labels
- Configuring Related Records for Display in Primo
- Configuring Best Location
- Branding the Delivery Tabs
- Adding Primo Search Box to the Alma Home Page
- Adding a General Electronic Service
- Displaying Historical Loans in Primo
- Displaying the Maximum Renewal Date in Primo
- Displaying the Link to the Leganto Reading List
- Configuring the Template for the Location Map Link

If you are working in a collaborative network, also see Resolving Electronic Resources in the Network Zone.
Primo View It

Note
If you are working with Primo VE, see Configuring Delivery Services for Primo VE for more details.

Displaying License Information
Alma allows you to display an electronic resource’s license information in View It. The displayed terms of the license can be configured in Alma, as well as the license-related labels that display in View It.

Note
This section applies only to Primo. For information on how to configure license information to display in Primo VE and
After the user selects the Show license link, the name of the link changes to Hide license, and the license information appears as configured in Alma:

For more information, view the Display License Information in View It video (5:02 mins).

To configure the display of license-related information, the following roles are necessary:

- Acquisitions Administrator
- Fulfillment Administrator
- General System Administrator

To display license information in View It:

1. Specify which license terms to display in View It. For information on the Display to Public field, see To add a license term.
2. If needed, modify the license-related labels, which are defined by the codes that contain a `c.uresolver.viewit.license` prefix. For more information, see Configuring Labels.
3. Open the Other Settings page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Other Settings).
4. Select the Enable Display of License Information check box.
5. Select Save.
For more information on configuring the license terms in Alma, see Managing License Terms.
Primo Get It

Note

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

Return to menu

Primo Get It (which displays on the Services Page and during the discovery of local Alma records in Primo) allows patrons to determine the following information for each physical title displayed in the search results:

- The locations in which the title can be found
- The availability of the title
- The request options

The order of the search results may be configured. See Configuring the Order of Primo Search Results.

If the user belongs to a collaborative network, additional locations and services may be viewed by selecting the More link in Primo Get It. For more information, see The More Link and Institutions Lightbox.

Depending on the number of locations per title, the type of resource, and the request options for the logged in patron, Primo Get It may display holdings information, item-level information, and/or request information.

Note

- The Get It service can be integrated with any third-party discovery system that is configured to use a SAML-based identity provider for both Alma and the discovery interface authentication. For detailed information, see https://developers.exlibrisgroup.com/alma/integrations/discovery.
- It is not recommended to perform searches on different tabs in your browser and request View It or Get It information from a tab in which the last search was not performed.

Holdings List

If multiple holdings (852 fields) exist for a title, the system displays each location on a separate line and includes the following information for each entry:

- Owning library (852 $$b)
- Shelving location (852 $$c)
- Call number (852 $$h - $$m)
- Accession number (852 $$p) – If it exists, the system will prefix the number with "Accession:" and omit the call number.
- Copy number (852 $$t) – If it exists, it should display after the public note (852 $z) in the single holding display only. The copy number is prefixed with the following customizable text: Copy: .
Public note (852 $$z) - For more information, see Displaying Public Notes.

Availability information - For more information, see Filtering the Library List for Availability in Primo.

For example:

<table>
<thead>
<tr>
<th>Location</th>
<th>Availability</th>
<th>Location Map</th>
</tr>
</thead>
<tbody>
<tr>
<td>Theology Library Stacks BR116 .03 W413 2009</td>
<td>(1 copy, 1 available)</td>
<td>Locate</td>
</tr>
</tbody>
</table>

Get It Tab - Non-Serial Title with Multiple Locations

For serial titles, the following information is also included:

- Summary holdings statement (866 $$a)
- Public note (866 $$z) - For more information, see Displaying Public Notes.

Note

The availability information is omitted for serials.

For example:

<table>
<thead>
<tr>
<th>Location</th>
<th>Holdings</th>
<th>Location Map</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line Library Stacks TS3 A2 A4</td>
<td>v.49 no.2-65(1984-2009)</td>
<td>Locate</td>
</tr>
<tr>
<td>Line Library Current Periodicals TS3 A2 A4</td>
<td>Current issues are listed below</td>
<td>Locate</td>
</tr>
</tbody>
</table>

Get It Tab - Serial Title with Multiple Locations

Holdings can be displayed either according to availability or according to their proximity to the requesting patron. You configure this via the Locations Ordering Profiles setting in Fulfillment Configuration (see Configuring Locations Ordering Profiles).

For information on displaying additional holdings information in the Get It tab, see Displaying Additional Holdings Information.

Configuring the Sort Order of Physical Items

The Sort Routine List page allows you to define the sort used for the list of items in Primo Get It. For more information, see Configuring Physical Item Sort Routines.

To apply a sort to the items on the Get It tab:

1. On the Physical Item Sort Routines page (Configuration Menu > Resources > General > Physical Item Sort Routines), select Edit from the row actions list in the row that contains the sort routine that you want to use in Primo.
Get It.

2. Select the **Display Configuration** tab.
3. Select the **Resource management Get it results** parameter and its associated **Set as default** parameter.
4. Select **Save**.

---

**Items List**

Users can view the items that are related to a specific holdings record by selecting the holdings entry in the Get It tab. After an entry has been selected, the system displays the items that are associated with the selected holdings record (up to 10 per page). For each item, the system displays the following information:

- Barcode
- Material type
- Policy – When a patron is signed in, the system calculates the loan terms of use that will be applied to the loan, and displays the name of the due date policy in this column. If the patron is not signed in, the system checks whether there are any terms of use rules (for that item’s location, material type and item policy) that allows this item to be loaned. If so, the **Loanable** label is displayed. If no terms of use rule is found, then the **Not Loanable** label is displayed.
- Description – Displays only for items that have a Description field.
- Item status
- Library
- Location
- Accession Number
- Availability Info
- Alt Call Number
- Public Note

---

**Note**

Item availability shows outstanding requests as well as the copies held.

---

If users want to narrow the scope of a serial’s list, they may use the following filters, which contain values that are relevant to the items in the list: **Year, Volume, Description**.

---

**Request Options**

Primo Get It allows users to perform the following types of requests, if permitted by the user, for the selected title: Request, Digitization, and other (such as resource-sharing requests and document delivery).

All request options appear as buttons above the holdings for non-serials and within the list of items for serials. For example:
The system displays the request options only if the signed-in user is eligible to place them. If the user is not signed in, the system displays the following message above the list of holdings or items: Please sign in for request options.

For items temporarily located in a resource sharing library (items lent to a resource sharing partner), the Request option appears only if the following configurations have been set in Alma:

- A hold shelf is defined at the circulation desk of the resource sharing library (ensure that the Has Hold Shelf setting is selected when configuring a circulation desk; for details, see Configuring Circulation Desks).
- The resource sharing library has a Deliver To relationship with a library that has a defined hold shelf (for details, see Configuring Fulfillment Services Between Libraries Within an Institution).

The item’s status is listed in Primo as: On ILL Process until <expiration date>

For serial titles, users perform requests at the title+description level. For example:

Requests from Primo are on the title level. For serials, requests will be on a title+description level. To configure Primo to use item level requesting, contact Ex Libris support.

The information (including the request options) that appears in the Get It tab is configured entirely in Alma. Alma allows you to configure the following information in the Get It tab:

- Hide request options – Alma allows you to configure the behavior of the delivery tabs, such as hiding full-text service from a particular user group. For more information, see Configuring Display Logic Rules.
- Labels used for various display fields – see Modifying Display Labels
- Look of the Get It tab – see Branding the Delivery Tabs
- Miscellaneous information such as how to define location map links – see Configuring the Template for the Location Map Link
Fields to be displayed on the hold request form, booking request form, and digitization request form can be configured. See [Customizing Primo Request Forms](#).

For information on configuring the request options, refer to [Alma Fulfillment](#).

**Requesting From Other Institutions Without a Local Linked Patron**

When using Primo discovery across a fulfillment network, it is possible to retrieve another institutions’ information without copying over the patron information from the original institution and without creating a linked account.

The user parameter `uresolver_remote_register` controls whether the other institution’s holdings may be retrieved without creating a local linked patron record (see [Configuring Other Settings](#)). The parameter values are:

- **Auto** - An linked account will be created automatically. This is the default.
- **None** - There will be no option to create a linked account via the Get It page. Only holdings information will be displayed.
- **Manual** - The Get It window will display a link to sign into the institution. Selecting the link will open the request form from the source of the linked account.

![Get It Registration Link](#)

**Selecting a Library for a Resource Sharing Request**

When multiple resource sharing libraries are enabled for a patron, you can select which resource sharing library is to be used for the Primo search results.

Before selecting a resource sharing library for a Primo user, you must do the following:

- Ensure that the patron has multiple resource sharing libraries configured (see the [Resource Sharing Library](#) entry in [Quick User Management Page Fields](#)).
- Ensure that the `ill_item_creation_lib_code` setting on the Customer Parameters Mapping Table is set to `ALL` (see [Configuring Other Settings](#)).

**To select from multiple resource sharing libraries:**

Perform a search for an item in Primo, and select the Get It link for a result. Primo Get It opens.
Primo Get It Tab

- Select the **Resource Sharing Request** link. The page refreshes.

Primo Get It Tab – Multiple Resource Sharing Libraries

- In the **For Library** field, select the relevant resource sharing library. The libraries display according to the ill_item_creation_lib_code value in the CustomerParameters mapping table see Configuring Other Settings), and/or those for which the patron’s TOU are enabled.

- Scroll down in the Get It tab page and locate the **Pickup/delivery location** field in the Delivery Information section. Specify a location for pickup/delivery in the drop-down list.
The values in the **Pickup/delivery location** drop-down depend on the values selected in the **For library** field in the previous step. Fields to be displayed on the resource sharing request form can be configured on the [Resource Sharing Form Customization](#) page.

**Displaying Real Time Item Descriptions for a Borrowing Request**

Primo users can see the list of descriptions of the items they want to request. The items descriptions are based on the values of the Description fields of the items that match the request attributes, as per the locate profiles. Alma runs a locate process on all of the rota's partners in order to populate the list of items. This option is available when the rota partners are use an Alma locate profile. They can place their resource sharing request based on a specific description.

When a user opens up a request form, a spinner indicator appears and a message is displayed that the system is
checking for item level descriptions. The descriptions are then loaded into a drop down list. When the values are loaded into it, the description field becomes mandatory. If no descriptions are available, a message is displayed that no item level descriptions were found.

This option is activated if the description field is made visible (see Customizing Primo Resource Sharing Forms). The field is disabled by default.

### Displaying Public Notes

Primo displays public notes as follows in Primo Get It:

In addition to displaying the 852 $z subfield in the holdings information on the items list page, Primo also displays this information under the Holdings column on the holdings list page.

Primo displays item-level public notes (which are added with the Physical Item Editor) under the Description column in the items list. The note appears after the "Note:" label, which can be customized.

**Public Notes in Holdings List in Primo Get It**

Primo displays item-level public notes (which are added with the Physical Item Editor) under the Description column in the items list. The note appears after the "Note:" label, which can be customized.

**Public Notes in Items List in Primo Get It**

No additional configuration is necessary to enable this functionality, but you can modify the labels that display in Primo.

To configure the display of license-related information, either of the following roles can modify display labels:

- Fulfillment Administrator
- General System Administrator

**To modify the public note display label:**

1. On the Labels page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Labels), select Customize in the line containing the following code and modify the text in the Description field: c.uresolver.getit2.item_list.note.
2. Select Customize at the bottom of the page to store the modified label in the system.
Alma allows you to display additional holdings information in the Primo Get It tab. The following table lists the MARC fields that hold additional information to display in Primo. To display most of this additional information, you must first enable the `uresolver_enable_getit_holding_configuration` or `display_additional_holding_fields_in_getit` Other Settings parameter.

### Display Additional Holdings Information

<table>
<thead>
<tr>
<th>MARC Field</th>
<th>Description</th>
<th>Requires Enabling?</th>
</tr>
</thead>
</table>
| 867 (Textual Holdings - Supplementary Material) | This field displays in the holdings list and in the single holdings display. The information appears after the "Supplementary Material: " label, which can be customized by modifying the description for the following code:  
  `c.uresolver.getit2.holding_list.supplementary_material` | N                  |
| 868 (Textual Holdings - Indexes)    | This field displays in the holdings list and in the single holdings display. The information appears after the "Indexes: " label, which can be customized by modifying the description for the following code:  
  `c.uresolver.getit2.holding_list.indexes` | Y                  |
| 561 (Ownership and Custodial History) | This field displays in the holdings list and in the single holdings display. Primo displays only the following subfields, which are separated by a comma:  
  - $a (History)  
  - $u (Uniform Resource Identifier)  
  - $3 (Materials specified)  
  This information appears after the "Ownership and Custodial History: " label, which can be customized by modifying the description for the following code:  
  `c.uresolver.getit2.holding_list.ownership` | Y                  |
| 563 (Binding Information)           | This field displays in the holdings list and in the single holdings display. Primo displays only the following subfields, which are separated by a comma:  
  - $a (Binding note)  
  - $u (Uniform Resource Identifier)  
  - $3 (Materials specified)  
  This information appears after the "Binding: " label, which can be customized by modifying the description for the following code:  
  `c.uresolver.getit2.holding_list.binding` | Y                  |
| 541 (Immediate Source of Acquisition Note) | This field displays in the holdings list and in the single holdings display. Primo displays only the following subfields, which are separated by a comma:  
  - $a (Source of acquisition)  
  - $b (Address)  
  - $c (Method of acquisition) | Y                  |
<table>
<thead>
<tr>
<th>MARC Field</th>
<th>Description</th>
<th>Requires Enabling?</th>
</tr>
</thead>
<tbody>
<tr>
<td>$d (Date of acquisition)</td>
<td><strong>Source of Acquisition:</strong> label, which can be customized by modifying the description for the following code: <code>c.uresolver.getit2.holding_list.source_of_acq</code></td>
<td></td>
</tr>
<tr>
<td>852 $t (Copy number)</td>
<td><strong>Copy:</strong> label, which can be customized by modifying the description for the following code: <code>c.uresolver.getit2.item_list.copy</code></td>
<td>N</td>
</tr>
</tbody>
</table>

The following figure shows examples of additional holdings information in the Primo Get It tab:

### Additional Holdings Information Shown in Primo Get It

The following role can modify the parameters in the Customer Parameters mapping table:

- **General System Administrator**

To display additional holdings information in Primo Get It:

Set `uresolver_enable_getit_holding_configuration` or `display_additional_holding_fields_in_getit` to `true` (see Configuring Other Settings).

Either of the following roles can modify display labels:

- **Fulfillment Administrator**
- **General System Administrator**

To modify a display label:

1. On the Labels page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Labels), select **Customize** to the right of the label that you want to edit and modify the text in the **Description** field.
2. Select **Customize** at the bottom of the page to store the modified label in the system.

Alma offers expanded holdings information and customization options in the Primo Get It tab. A configuration table, **Primo Customized Holding** (see Configuring Holdings Display Labels), allows you to configure which of the holdings...
records’ fields and subfields will appear in the Get It tab, and allows for the labels and order of the holdings fields to be customized. The Holdings Display Labels and Order table (see Configuring Primo Holdings Display) allows you to configure the exact labels that will be used for each field, and the order by which they will appear in the Get It tab. The tables are only visible if the uresolver_enable_getit_holding_configuration (see Configuring Other Settings), parameter is set to true. When this parameter is set to true, the previous customer parameter that expanded the holdings, display_additional_holding_fields_in_getit, is not considered.
Modifying Display Labels

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

To configure labels, you must have one of the following roles:

• General System Administrator
• Fulfillment Administrator

Note
This section applies only to Primo. For information regarding Primo VE and Alma-Summon environments, see the following pages:

• Configuring Display Labels for Primo VE
• Configuring Display Labels for Alma-Summon

The Discovery Interface Labels Code Table page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Labels) contains predefined labels that appear in Primo. You cannot add or remove these labels, but you can edit the label’s text to meet your requirements. For more information about code tables, see Code Tables.

![Discovery Interface Labels Code Table (Partial Listing)](image)

Note
• Labels can be configured at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.
• The Enabled column is not functional on this page and will be removed in an upcoming release.
• For user-created license terms that appear in Primo, see Viewing User-Created License Terms that Appear in...
In addition, you can add HTML code to these fields to change the display of labels. For example, if you modify the following field as indicated, the output appears as displayed in the figure below.

- `c.uresolver.request.request_type` = Request Type: <font color=red>ALL FIELDS REQUIRED!</font>

Modified Label with HTML in Primo Get It

List of Commonly Used Labels

<table>
<thead>
<tr>
<th>Label Code</th>
<th>Default Value</th>
<th>Location in Interface</th>
</tr>
</thead>
<tbody>
<tr>
<td>New for June! c.search.htmlCreator.unifiedDisplay</td>
<td>{0} copy, {0} available, {0} requests</td>
<td>Displays the count in the items list.</td>
</tr>
<tr>
<td></td>
<td>Formatted as: {{copies_labels}}, {{available_labels}}, {{requests_labels}}.</td>
<td>- Brackets within the new label: {{copies_labels}} will be populated with information from these existing labels:</td>
</tr>
<tr>
<td></td>
<td>All content in curly brackets cannot be changed or translated because they represent other labels. Text can be added before, after or between each pair of curly brackets. Or one of the labels can be removed.</td>
<td>◦ c.search.htmlCreator.copy for a single copy</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ c.search.htmlCreator.copies if there are multiple copies</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Brackets within the new label: {{available_labels}} will be populated with information from this existing labels:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ c.search.htmlCreator.available. If you have configured Time to reshelve, the following labels may replace it:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ c.uresolver.getit2.item_list.status.SOME_HOLDING_ITEMS_AWAITING_</td>
</tr>
<tr>
<td>Label Code</td>
<td>Default Value</td>
<td>Location in Interface</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>----------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>c.uresolver.locate</td>
<td>Locate</td>
<td>Link to locate location in library (location map). Appears both in items list (when only one holding) and holdings list (when more than one holding).</td>
</tr>
<tr>
<td>c.uresolver.request</td>
<td>Request</td>
<td></td>
</tr>
<tr>
<td>c.uresolver.request.submitSuccessfully</td>
<td>Request Placed</td>
<td>This label displays in Get It after a request has been submitted.</td>
</tr>
<tr>
<td>c.uresolver.request.placeInQueue</td>
<td>For customers that went live before the August 2019 release, the default value is: Place in queue is {0}. For customers going live in August 2019 or later, the default value is: {0} user(s) before you get served.</td>
<td>This label displays in Get It after a request has been submitted.</td>
</tr>
<tr>
<td>c.uresolver.request.submitFailed</td>
<td>Failed to place a request on the resource. Please contact the library.</td>
<td>This label displays in Get It when a request submission fails.</td>
</tr>
<tr>
<td>c.uresolver.request.title</td>
<td>Details of title you requested:</td>
<td>This label displays on the top of a digitization or hold request form.</td>
</tr>
<tr>
<td>c.uresolver.request.notNeededAfter</td>
<td>Not Needed After:</td>
<td>This label displays on the Hold Request form.</td>
</tr>
<tr>
<td>c.uresolver.request.Partial.madatoty_comment</td>
<td>Please add the part to digitize</td>
<td>Partial digitization confirmation message</td>
</tr>
<tr>
<td>c.uresolver.request.institution_dropdown_my_institution</td>
<td>My Institution</td>
<td>In fulfillment network configuration, the pickup location selection in the request form displays a My Institution option.</td>
</tr>
<tr>
<td>c.uresolver.request.institution_dropdown_other_institutions</td>
<td>Other Institutions</td>
<td>In fulfillment network configuration, the pickup location selection in the request form displays a label, Other Institution,</td>
</tr>
</tbody>
</table>

RESHELVING,
- c.uresolver.getit2.item_list.status.ALL_HOLDING_ITEMS_AWAITING_RESHELVING.

- Brackets within the new label: {{requests_labels}} will be populated with information from these existing labels:
  - c.search.htmlCreator.request if there is a single request
  - c.search.htmlCreator.requests If there are multiple requests
  - c.search.htmlCreator.noRequests if there are no requests
<table>
<thead>
<tr>
<th>Label Code</th>
<th>Default Value</th>
<th>Location in Interface</th>
</tr>
</thead>
<tbody>
<tr>
<td>c.uresolver.request.comment</td>
<td>Comment:</td>
<td>This label displays on the Request form.</td>
</tr>
<tr>
<td>c.uresolver.request.manualDescription</td>
<td>Manual Description:</td>
<td>The <strong>Request a different issue</strong> link appears in Get It if the item has a description or the resource holding has a summary holdings field. This allows users to request items that may have not been cataloged. After selecting the <strong>Request a different issue</strong> link, this label appears on the request form.</td>
</tr>
<tr>
<td>c.uresolver.request.submitRequest</td>
<td>Request</td>
<td>This label displays for the Request button at the bottom of the Request form.</td>
</tr>
<tr>
<td>c.uresolver.request.refresh</td>
<td>Refresh Services List</td>
<td>After submitting a request, the Refresh Services List link appears in Get It.</td>
</tr>
<tr>
<td>c.search.htmlCreator.copy</td>
<td>copy</td>
<td>Displays the count of total copies and copies available <em>(X copy, Y available)</em> in the items list.</td>
</tr>
<tr>
<td>c.search.htmlCreator.copies</td>
<td>copies</td>
<td>Availability display</td>
</tr>
<tr>
<td>c.search.htmlCreator.request</td>
<td>request</td>
<td>Availability display</td>
</tr>
<tr>
<td>c.uresolver.ServicesForThisTitle</td>
<td>Services For This Title</td>
<td>This label appears in View It when there are General Electronic services available.</td>
</tr>
<tr>
<td>c.uresolver.GeneralElectronicServices</td>
<td>Additional services</td>
<td>This label appears in View It when there are related records.</td>
</tr>
<tr>
<td>c.uresolver.ServicesForRelatedTitles</td>
<td>Services For Related Titles</td>
<td>This label appears in View It when there is full text services available.</td>
</tr>
<tr>
<td>c.uresolver.availableOnline.full_text_prefix</td>
<td>Full text available at:</td>
<td>The label appears in View It when there is full text services available.</td>
</tr>
<tr>
<td>c.uresolver.availableOnline.selected_full_text_prefix</td>
<td>Selected full text available at:</td>
<td>The prefix for a full text link in View It.</td>
</tr>
<tr>
<td>c.uresolver.emptyList</td>
<td>No full text available</td>
<td>This label appears in View It when there is no full text services available.</td>
</tr>
<tr>
<td>c.uresolver.error</td>
<td>We're sorry. An error occurred while retrieving services for this title.</td>
<td>This label appears in Get It and View It if there was a processing error.</td>
</tr>
<tr>
<td>c.uresolver.request.ill</td>
<td>Resource Sharing Request:</td>
<td>This label appears at the top of the Resource Sharing Request form.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.citationType.book</td>
<td>Book</td>
<td>This label appears as an option for the Citation Type field on the Resource Sharing Request form.</td>
</tr>
<tr>
<td>Label Code</td>
<td>Default Value</td>
<td>Location in Interface</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------</td>
<td>------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>c.uresolver.request.ill.citationType.article</td>
<td>Article</td>
<td>This label appears as an option for the Citation Type field on the Resource Sharing Request form.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.format.physical</td>
<td>Physical</td>
<td>This label is found on the Resource Sharing Request tab &gt; Delivery Information &gt; Format &gt; Physical.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.format.digital</td>
<td>Digital</td>
<td>This label is found on the Resource Sharing Request tab &gt; Delivery Information &gt; Format &gt; Digital.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.format.physicalNonReturnable</td>
<td>Physical non-returnable</td>
<td>This label is found on the Resource Sharing Request tab &gt; Delivery Information &gt; Format &gt; Physical non returnable.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.delivery.library</td>
<td>Deliver to library</td>
<td>This label is found on the Resource Sharing Request tab &gt; Delivery Location &gt; Delivery to Library.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.delivery.alternative</td>
<td>Alternative address</td>
<td>This label is found on the Resource Sharing Request tab &gt; Delivery Location &gt; Alternative address.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.volume</td>
<td>Volume:</td>
<td>This label displays on the Resource Sharing Request form for both articles and books.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.issue</td>
<td>Issue:</td>
<td>This label displays on the Resource Sharing Request form for articles.</td>
</tr>
<tr>
<td>c.uresolver.availableOnline.service_is_temporary_unavailable_due_to</td>
<td>Service temporarily unavailable due to</td>
<td>This label appears in View It when the service is temporarily unavailable and a Service unavailability reason has been defined in Alma (see figure below).</td>
</tr>
<tr>
<td>c.uresolver.availableOnline.service_is_temporary_unavailable</td>
<td>Service temporarily unavailable</td>
<td>This label appears in View It when the service is temporarily unavailable and there is no Service unavailability reason defined in Alma (see figure above).</td>
</tr>
<tr>
<td>Label Code</td>
<td>Default Value</td>
<td>Location in Interface</td>
</tr>
<tr>
<td>------------</td>
<td>---------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>c.uresolver.getit2.request.request_options</td>
<td>Request Options:</td>
<td>This label appears next to the list of request options in Get It.</td>
</tr>
<tr>
<td>c.uresolver.getit2.request.monograph</td>
<td>Request</td>
<td>This label appears for the Request link in Get It. If all items are monographs, the link will be at the title level.</td>
</tr>
<tr>
<td>c.uresolver.getit2.request.serial</td>
<td>Request</td>
<td>This label appears for the Request link in Get It. If there are serial items, the link will be at the item level.</td>
</tr>
<tr>
<td>c.uresolver.getit2.request.noItems</td>
<td>Don't see what you need? Request Anyway</td>
<td>This request option appears when the item is not available at this location. Select the link to create a request.</td>
</tr>
<tr>
<td>c.uresolver.getit.related_title_display</td>
<td>Inventory of related &quot;(0)&quot; is listed below</td>
<td></td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.location_map</td>
<td>Location Map</td>
<td>This is the column title for the Locate links in the holdings list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.related_holdings</td>
<td>Related holdings</td>
<td>This is the label that appears with related holdings. See the Enabling the Display of Related Records in Primo section for more information.</td>
</tr>
<tr>
<td>c.uresolver.getit2.ill_request.monograph</td>
<td>Resource sharing request</td>
<td>The Resource Sharing Request link displays in the request options at the title level when all items are monographs (without description) or there are no holdings.</td>
</tr>
<tr>
<td>c.uresolver.getit2.ill_request.serial</td>
<td>Resource sharing request</td>
<td>The Resource Sharing Request link displays in the request options at the title level when at least one of the items is serial (with description) or no items exist.</td>
</tr>
<tr>
<td>c.uresolver.getit2.digitization_request.monograph</td>
<td>Digitization</td>
<td>The Digitization Request link displays in the request options at the title level when all items are monographs (without description) or there are no holdings.</td>
</tr>
<tr>
<td>c.uresolver.getit2.digitization_request.serial</td>
<td>Digitization</td>
<td>The label displays in the holding item digitization service in Primo Get It.</td>
</tr>
<tr>
<td>c.uresolver.getit2.display_related_holding_separately_from_original_record</td>
<td>LOCATIONS FOR RELATED TITLES</td>
<td>The label that appears above the list of related holdings if the Separately from the original record holdings option is selected. See the Enabling the Display of Related Records in Primo section for more</td>
</tr>
<tr>
<td>Label Code</td>
<td>Default Value</td>
<td>Location in Interface</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| c.uresolver.getit2.display_related_holding | Alma-Primo: Related title:0 (1)  
Primo VE: Related title:0 | Appears in Get It to indicate that the physical title is related to the record.  
For Alma-Primo environments only, the type of relation is appended to the end of the title. For example:  
Related title:Art / (Contains) |
<p>| c.uresolver.getit2.item_list.pagination.records | Records                                                                      |                                                                                        |
| c.uresolver.getit2.item_list.type       | Type                                                                          | The <strong>Type</strong> column is in the holding item in Primo Get It.                          |
| c.uresolver.getit2.item_list.policy     | Policy                                                                        | The <strong>Policy</strong> column is in the item list in Primo Get It.                           |
| c.uresolver.getit2.item_list.status     | Status                                                                        | The <strong>Status</strong> column is in the holding item in Primo Get It.                        |
| c.uresolver.getit2.item_list.empty      | No items exist. Please refer to the request options above                    | The label is in the items list when there is a holding without items.                |
| c.uresolver.getit2.request_different   | Request a different issue                                                    | The <strong>Request a different issue</strong> link will appear in Primo Get It if the item has a description or the resource holding has a summary holdings field. This will enable requesting items that may have not been cataloged. |
| c.uresolver.getit2.digitize_different  | Digitize a different issue                                                   | The <strong>Digitize a different issue</strong> column is in the holding item in Primo Get It.    |
| dlf.block.expiry                   |                                                                              | Configure with {0} to display the user's block expiry on the <strong>My Account</strong> page. For example, entering <strong>Expired on (0)</strong> in the label description will be displayed as <strong>Expired on 07/07/2017</strong>. |
| dlf.onHoldShelf.until               | until (0)                                                                     | This label appears in the <strong>List of Requests</strong> in <strong>My Account</strong>. The first part of the status is based on the status and therefore may not be configured. Only the text of <strong>until (0)</strong> is configurable. |</p>
<table>
<thead>
<tr>
<th>Label Code</th>
<th>Default Value</th>
<th>Location in Interface</th>
</tr>
</thead>
<tbody>
<tr>
<td>c.uresolver.request.part_to_digitize</td>
<td>Part to Digitize:</td>
<td>The label is in the digitization request in Primo Get It.</td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.empty.top</td>
<td>Your search did not match any physical resource in the library</td>
<td>When there are no holdings, this is the first row in Primo Get It (if the user is signed in).</td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.empty.signed_in_user</td>
<td>Use the link/s below in order to request the resource from other libraries</td>
<td>When there are no holdings, this is the second row in Primo Get It (if the user is signed in).</td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.empty.signed_in_user.no_services</td>
<td>There are no services available</td>
<td>When there are no holdings and no services, this is the message shown in Primo Get It (if the user is signed in).</td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.empty.bottom</td>
<td>Having problems? Please contact the ExLibris staff</td>
<td>When there are no holdings, this description is shown at the bottom in Primo Get It (if the user is signed in).</td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.empty.guest_user</td>
<td>In order to receive options to request the resource from other libraries, please sign in.</td>
<td>When there are no holdings and user is not signed in, this is shown in Primo Get It.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.non_circulating</td>
<td>Not loanable</td>
<td>When item is not loanable (according to policy), the Policy under the item list will be Not loanable.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.circulating</td>
<td>Loanable</td>
<td>When the item is loanable (according to policy), the Policy under the item list will be Loanable.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.alt_call_number_prefix</td>
<td>Additional location information:</td>
<td>A prefix for the alternative call number appears next to an item description in the Get It items page,</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.ITEM_NOT_IN_PLACE</td>
<td>Item not in place</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.ITEM_IN_PLACE</td>
<td>Item in place</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.ACQ.with_expected_date</td>
<td>On order until {0}</td>
<td>This is a status in the item list (expiration date is included).</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.TRANSIT.with_expected_date</td>
<td>In transit until {0}</td>
<td>This is a status in the item list (expected arrival time is included).</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.NOPROCESS.with_no_expected_date</td>
<td>On Shelf</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>Label Code</td>
<td>Default Value</td>
<td>Location in Interface</td>
</tr>
<tr>
<td>------------</td>
<td>---------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.WORK_ORDER_DEPARTMENT.with_expected_date</td>
<td>In process of (0) until {1}</td>
<td>This is a status in the item list (expiration date is included).</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.LOST_LOAN.with_expected_date</td>
<td>Lost since (0)</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.CLAIM_RETURNED_LOAN.with_expected_date</td>
<td>Claimed returned. Due on {0}</td>
<td>This is a status in the item list (due date is included).</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.LOAN.with_expected_date</td>
<td>On loan until (0)</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.OVERDUE.with_expected_date</td>
<td>On loan - overdue since {0}</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.WORK_ORDER_DEPARTMENT.with_no_expected_date</td>
<td>In process of (0)</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.ILL.with_expected_date</td>
<td>On ILL process until {0}</td>
<td>This is a status in the item list (when the Resource Sharing request has a due date.)</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.ILL.with_no_expected_date</td>
<td>On ILL process</td>
<td>This is a status in the item list (when the Resource Sharing request doesn't have due date).</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.TECHNICAL.with_no_expected_date</td>
<td>Technical</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.viewit.related_type_list.CONTAINS</td>
<td>Related Records</td>
<td>This is the label for the relation type Contains. This label appears with View It related records. See the Enabling the Display of Related Records in Primo section for more information.</td>
</tr>
<tr>
<td>c.uresolver.viewit.relatedTemplate</td>
<td>@TITLE (@RelationType)</td>
<td>This is shown in View It.</td>
</tr>
<tr>
<td>c.uresolver.missingProvider</td>
<td>view full text</td>
<td>This is the link to the full text in View It.</td>
</tr>
</tbody>
</table>
Configuring Related Records for Display in Primo

Related records indicate to the OpenURL link resolver that, when a user receives a certain record in the search results, another record should also be returned as related. The MARC linking entries (MARC fields 76X-78X) are used to link bibliographic records and to differentiate their relationships to users. For electronic services, the configuration of related records are useful for the following reasons:

- Articles sought by users may be available only in related versions of the journal.
- Metadata in the OpenURL can be for one publication, but in fact, a related journal by another name is what the end user sought.
- Vendors may list previous or newer versions in their holdings causing inconsistencies in the Community Zone. For example, the journal Civil Engineering Systems is now named Civil Engineering and Environmental Systems.

In the following example, View It displays the available services for the discovered record and the host record:

```
Source: Civil engineering systems [0263-0257]
Full text available at: Taylor & Francis CRKN Science and Technology

Services For Related Titles
Civil engineering and environmental systems (Precedes)
Full text available at: CCC Get It Now Taylor and Francis

Additional services
Search this on Amazon
```

Related Records as Shown in View It

A close relation indicates that the two records should be considered identically useful in the search results. If the record requested in the OpenURL has close relations (MARC 773 and 774) with another record, electronic services for the related record are included in View It, with no indication that these services are for the related record. To the user, it seems as if these services are for the record sent in the OpenURL. Since the relation type is very close, it can be considered equivalent; and as far as the user is concerned, no distinction needs to be made. Other types of relations are considered remote and are listed under the Services for Related Titles section in View It.

Note

To configure close relations to appear in the same section as the related titles in View It, see the Display closely related record services option in Enabling the Display of Related Records in Primo.

---

Note

This section applies only to Primo. For information on how to configure related records in Primo VE and Alma-Summon environments, see Configuring Related Record Services for Primo VE.
To configure the order of Primo search results, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Alma determines the location display priority primarily by availability. Holdings with the greatest number of available items are displayed first (this cannot be configured). In addition, Alma enables you to give preference to locations that match the IP address of the patron's IP address. These locations include the AVA $$P field. For more information, see the following topic: Discovery in Collaborative Networks

Based on one or more of the following criteria, holdings locations are displayed in order on the first page in Primo Get It:

- According to the holdings’ locations and their proximity to the patron, according to the library IP address. The locations in the libraries closest to the patron appear at the top of the holdings list. If this criteria is used, it takes priority over the holdings' availability.

- According to the holdings’ availability, in the order (by default):
  1. In temporary locations
  2. In permanent locations
  3. In remote locations

You select this order on the Locations Ordering Profile page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Locations Ordering Profile).

Note

If you are working with Primo VE, see Configuring Delivery Services for Primo VE for more details.
To configure a locations ordering profile:

1. In the **Use Alphabetical Sorting Only** field, select **Yes** to sort the holdings alphabetically by the external location name in Primo Get It. The order of the locations is passed to Primo in the AVA $$p subfield during RTA. The alphabetical sorting logic is hard-coded.

   When this option is set to **Yes**, all other ordering options on this page are disabled.

2. In the **Use "IP best location" sorting** field, select **Yes** to configure the display of holdings by location. IP addresses must be defined for the libraries. **No** indicates that holdings are displayed by availability and that for the display of holdings locations, IP addresses do not need to be defined.

   IP addresses can be configured:
   
   ◦ On the library level (see [Managing IP Definitions for a Library](#))
   
   ◦ On the campus level (see [Editing a Campus](#))

3. In the **Prefer remote storage** field, select **Yes** to increase the priority of remote storage items when viewing results in Primo Get It, publishing to Primo, or the Primo RTA.

4. Select **Save**.
Branding the Delivery Tabs

Depending on which Primo UI are using, Alma uses the following CSS files to define the look and feel of the View It and Get It tabs and the Alma Link Resolver Electronic Services page:

- calendar.css – (classic Primo UI) The classes associated with the existing calendar component.
- mashup.css – This file contains the classes used for the classic Primo UI.
- mashup_new.css – This file contains the classes used for the new Primo UI.

Alma allows you to modify the CSS (and associated image files) that the system uses for the delivery tabs by uploading a customized CSS file. You can download a Zip file that contains the default CSS used for the delivery screens (see Creating a New Skin). By examining the UI page and the contents of the default CSS, you can determine which elements you want to customize.

Note

This section applies only to Primo. For customizations regarding Primo VE and Alma-Summon environments, see the following pages:

- Branding the View for Primo VE
- Branding the View for Alma-Summon

Add a Skin Page

Note

The View It tab uses separate CSS classes authNote and publicNote for displaying the authentication notes and public notes. It is possible to customize both of these elements.
Creating a New Skin

You can create new skins, as well as modify existing skins (see Modifying a Skin). After a skin has been created and uploaded to the server, it is important that you configure Primo to use the new skin. Otherwise, Alma continues to use the default skin for the delivery screens.

You create or modify skins on the Manage Skins page (Configuration Menu > General > User Interface Settings > Delivery System Skins).

To create a customized skin:

1. On the Manage Skins page, select Add Skin. The Add a Skin page appears.

2. In the Skin Details section, specify a unique name for the skin and an optional description.

3. Select one of the following radio buttons to download the correct template for your Primo UI: Current UI or New UI. If you are using both UIs in parallel, see Creating Parallel Skins for the New and Classic UIs.

4. In the Skin Zip File section, select the Default Zip file link to download the default CSS and associated image files to your desktop.

5. Modify the contents of the files that you want to customize.
   You must retain the original structure of the zip file, including the names of the files and subdirectories and the number of files.

   When customizing images, you must modify the version number to update the old image that may be stored in users' cache. For example, if you modified the calendar-icon.png file, you must change the version parameter in the calendar.css file from:

```
background: url(/view/branding_skin/icons/calendar-icon.png?version=1.0) no-repeat;
```

   to:
If the version parameter does not exist, you will have to add it as shown above.

6. Put the CSS and image files into a zip file, keeping the original structure of the default zip file.
7. In the Skin Zip File section, search for and select the new zip file in the Please submit a zip field.
8. Select Save.
9. In the Primo Back Office, add the following parameter to the related delivery templates (Almagetit, Almaviewit, Almagetit_remote, Almaviewit_remote, Almasingle_service_remote, Almagetit_services, Almasingle_services, Almaviewit_services) on the Templates mapping table page:

req.skin=<skin name>

---

**Note**

This step is not necessary if the Primo view code is the same as the skin code. In such cases, Alma uses the view code to match the appropriate skin. If you are using the new and classic UIs in parallel, see Creating Parallel Skins for the New and Classic UIs.

---

### Creating Parallel Skins for the New and Classic UIs

Before switching to the new UI, Primo allows customers to run the new Primo UI in parallel with the classic UI. This section describes the steps needed to create and use separate skins for each UI.

#### To create parallel skins:

1. If you have not already done so, create a separate view for the new UI. For more information see Views Wizard.
2. Create separate skins for the classic and new UIs, making sure to use the code of the corresponding Primo view as the skin’s name. For more information, see Creating a New Skin.

3. Make sure that you do not add the req.skin parameter to the delivery templates in the Primo Back Office. You may have to remove the req.skin parameter if previously defined for the classic UI's skin. For more information, see Updating the Delivery Templates.

---

**Modifying a Skin**

The Add a Skin page enables you to modify skins, as well as create new skins (see Creating a New Skin). To make sure that you are modifying the latest version of a CSS, it is recommended that you download the skin from the server each time you modify it, rather than modifying a copy that may be stored on your local machine.

**To modify a skin:**
You must retain the original structure of the default zip file, including the names of the files and subdirectories and the number of files.

1. Open the Manage Skins page (Configuration Menu > General > User Interface Settings > Delivery System Skins).

   ![Manage Skins Page](image)

2. Edit your skin.
3. In the Skin Zip File section, select the Skin Zip file link to download the customized CSS and associated image files to your local machine.

4. Modify the contents of the files that you want to customize.

To customize the mashup.css file, update and uncomment each class that you want to override. If you used an older version of the mashup.css file, you may need to copy the classes from the default Zip file, which is downloaded when adding new skins.

5. When customizing images, you must modify the version number to update the old image that may be stored in users’ cache. For example, if you modified the calendar-icon.png file, you must change the version parameter in the calendar.css file from:

   ```
   background: url(/view/branding_skin/icons/calendar-icon.png?version=1.0) no-repeat;
   ```

   To:

   ```
   background: url(/view/branding_skin/icons/calendar-icon.png?version=1.1) no-repeat;
   ```

   If the version parameter does not exist, you will have to add it as shown above.

6. Put the CSS and image files into a Zip file, keeping the original structure of the default Zip file.
7. In the **Skin Zip File** section, search for and select the modified Zip file in the **Please submit a zip** field.
8. Select **Save**.
Adding Primo Search Box to the Alma Home Page

Note

If you are working with Primo VE, see Configuring the Discovery Search Widget to configure the search box's default search field and operator precision.

You can add the Primo search box to the Alma Home Page so that staff users can search for items using Primo's search interface within Alma. This dashboard provides high-level information regarding the last publish-to-Primo job.

Primo Dashboard

The Publishing Jobs List link provides access to the Monitor Jobs page and only displays for staff users who have one of the following roles:

- General System Administrator
- Catalog Administrator

To add Primo's search box to the Alma home page:

1. Open the Primo Widget Search Fields code table (Configuration Menu > General > Widgets > Primo Widget Search Fields). For more information about code tables, see Code Tables.
2. Configure and enable the types of searches (such as title, subject, and so forth) that you want to allow from the search box and select **Save**.

**Note**
Currently, for the new Alma UI, only the default search type can be configured. The other search types will not be available in the search box.

3. Open the Primo Widget Search Precision code table (**Configuration Menu > General > Widgets > Primo Widget Search Precision**). For more information about code tables, see **Code Tables**.

**Primo Widget Search Precision Page**

4. Configure and enable the precision operators (such as **exact**, **contains**, and so forth) that you want to allow from the search box and select **Customize**.

**Note**
Currently, for the new Alma UI, only the default precision operator can be configured. The other operators will not be available in the search box.
5. Open the Primo Widget Configuration code table (Configuration Menu > General > Widgets > Primo Widget Configuration). For more information about code tables, see Code Tables.

6. Configure and enable the URL that is used for Primo searches and select Save.

   You must configure the **primo_search_box_url** parameter for the Primo widget search capability to be available from the Alma home page. The value for this setting needs to be a valid URL for a Primo brief search deep link. For more information, see the following page in the Ex Libris Developer Network:

   https://developers.exlibrisgroup.com/primo/apis/deeplinks/brief

   Format the URL as follows for both the new and classic Primo UIs:

   http://<Primo_domain>/primo_library/libweb/action/dlSearch.do?institution=<Primo_institution_code>&vid=<view_code>&tab=<tab_code> must be lowercase&search_scope=<scope_code>

   The following is an example of a valid URL:


   **Note**

   - If the **tab** and **search_scope** parameters are not specified, the system will use the view's default values.
   - The **query** parameter should not be configured in the URL. Alma builds the **query** parameter from the search value and the drop-down values specified in the search box by the user.
   - If you want to use the new Primo UI, make sure that the **New UI Enabled** and **Select View** fields are configured in the Primo Back Office Institution Wizard. This forwards all deep links to the new Primo UI. Otherwise, the system will display the classic Primo UI.

7. To have the Primo Dashboard appear on the Alma Home Page, see Managing Widgets.
Adding a General Electronic Service

To configure general electronic services, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Note
This section applies only to Primo. For information on how to configure general electronic services in Primo VE, see Configuring General Electronic Services for Primo VE.

In addition to services found in your own collection (such as full text, requests, and so forth), Alma enables you to define general HTTP services (such as searches in ProQuest dissertations and Amazon.com, Ask a Librarian, and so forth) to present to patrons in Primo. To have these services appear in Leganto, see Enabling General Electronic Services in Leganto.

In order to create a general electronic service, you must be familiar with the syntax of the service’s URL, which includes any parameters that are required to query or access specific information from the service. The service’s URL along with OpenURL context object attributes returned from Alma’s link resolver are used to define the URL template, which Alma uses to create the service link that appears in View It and/or Get It.

In addition, you can configure the following display settings for general electronic services:

- Specify service order – see Configuring General Electronic Services Order
- Define display logic rules – see Configuring Display Logic Rules

To configure general electronic services:

1. Open the General Electronic Services Configuration page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > General Electronic Services). In addition to the columns that are visible on the General Electronic Services list, the Item Level column may be added to the view in the view configuration.
2. Select **Add Service**. The Add Service dialog box opens.

![Add Service Dialog Box](image)

3. Enter the following service information:

   - **Service Code** – The internal code for the service.
   - **Service Name** – The internal name used for the service.
   - **Service Description** – The description of the service.
   - **Public Name** – The label for the link that displays in View It and/or Get It.
   - **Public Note** – The note or description of the service that displays below the link in View It and/or Get It.
   - **Is this a Document Delivery/ILL Service** – (Applies only to Alma-Summon and Primo VE environments.) Choose one of the following options: **Yes** indicates that this service provides access to the resource and will appear in the specified display location. **No** indicates that the links to the general electronic service will display in the Links section.
   - **Display Location** – Specify the areas in Primo in which the link displays. The following options are valid: **None**, **Getit & How To Getit**, **Viewit & How To Getit**, **Getit, viewit & How To Getit**, and **How To Getit only**.

### Note

The display of general electronic services is based on the service's availability rules that are defined with the Service Availability Rules tab, which appears while editing a general electronic service. For more details, see **step 5**. See **Configuring Display Logic Rules** if you want to hide the general electronic service based on
additional criteria (such as the existence of another type of service or the type of user).

- **URL Template** – The URL where the patron is redirected when the external service link is selected.

The URL substitutes OpenURL fields that are enclosed in brackets ( "{" and "}") with the relevant values. For example, the referring URL's ISBN is substituted into a URL containing: ...&isbn={rft.isbn}&...

For example, the URL for an Amazon search for a specific ISBN:

```plaintext
http://www.amazon.com/s/ref=nb_sb_ss_c_0_12?url=search-alias%3Dstripbooks&field-keywords={rft.isbn}
```

When connecting to a resource sharing broker, ensure that this field contains an attribute corresponding to the broker in use. For example, when using the OCLC broker:

```plaintext
http://xxx.worldcat.org/oclc/{rft.oclcnum}
```

ILLiad - Books/Book Items (based on your institution's base URL). For example:

```plaintext
http://libill.XXX.edu/illiad/
illiad.dll?Action=10&Form=30&rft.genre={rft.genre}&rft.title={rft.btitle}&rft.subtitle={rft.stitle}&rft.author={rft.atitle}&rft.pub={rft.pub}&rft.publisher={rft.publisher}&rft.place={rft.place}&rft.doi={rft.doi}&rft_dat={rft.oclcnum}&rfr_id={rfr_id}
```

ILLiad - Articles/Journals (based on your institution's base URL). For example:

```plaintext
http://libill.XXX.edu/illiad/
illiad.dll?Action=10&Form=30&rft.genre={rft.genre}&rft.title={rft.title}&rft.subtitle={rft.stitle}&rft.author={rft.atitle}&rft.pubyear={rft.pubyear}&rft.publisher={rft.publisher}&rft.place={rft.place}&rft.doi={rft.doi}&rft_dat={rft.oclcnum}&rfr_id={rfr_id}
```

ProQuest - Dissertation Service. For example:

```plaintext
http://gateway.proquest.com/openurl?res_dat=xri%3Apqm&title={rft.btitle}&rft_val_fmt=info%3Aofi%2Ffmt%3Akev%3Amtx%3Adissertation
```

The following values can be specified in the URL Template parameter between the curly brackets used for normalizing the ISBN, ISSN, eISBN, or eISSN:

- **rft.normalized_isbn**
  
  This normalization removes the text after digits and the hyphen (-) and converts ISBN 10 to ISBN 13

- **rft.normalized_issn**
  
  This normalization removes the text after digits and changes text to lower case.

- **rft.normalized_Eisbn**
  
  This normalization removes the text after digits and the hyphen (-) and converts ISBN 10 to ISBN 13.

- **rft.normalized_Eissn**
  
  This normalization removes the text after digits and changes text to lower case.
For more information regarding OpenURL, refer to the following:

- [Commonly Used OpenURL Attributes for the URL Template](#)
- [http://en.wikipedia.org/wiki/OpenURL](#)
- Specific vendor web sites for OpenURL details

Item Level - Select **yes** to show the link next to each item that matches the input rules. Select **no** to show the link at the holding level. This field is only active when the **Display Location** field is **Getit** or **None**.

---

**Note**

To prevent potential performance issues, the Item level General Electronic Services cannot be used for the **If Exists** portion of Display Logic Rules.

---

When the General Electronic Service is added as an item level service, the URL template may be configured to make use of the following Holdings and item level information:

<table>
<thead>
<tr>
<th>Holdings/Item Element</th>
<th>Name of Place Holder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Library (Code)</td>
<td>Library</td>
</tr>
<tr>
<td>Current Location (Code)</td>
<td>Location</td>
</tr>
<tr>
<td>Current Call Number</td>
<td>Call_Number</td>
</tr>
<tr>
<td>Barcode</td>
<td>Barcode</td>
</tr>
<tr>
<td>Material Type (Code)</td>
<td>Material_Type</td>
</tr>
<tr>
<td>Current Item Policy (Code)</td>
<td>Item_Policy</td>
</tr>
<tr>
<td>MMS ID</td>
<td>BIB MMS_ID</td>
</tr>
<tr>
<td>Process Type (Code)</td>
<td>Process_Type</td>
</tr>
<tr>
<td>Item description</td>
<td>Description</td>
</tr>
</tbody>
</table>

In addition, it is possible to add fields from the Holdings record to the URL template. The placeholder syntax is `HOL_{field}_{indicators}_{subfields}`. The use of indicators is optional. For example:

- **HOL_506_ab** - Alma will extract subfields a and subfield b from 506 field. Each subfield will be delimited from the next one with a space. The indicators are not taken into account.
- **HOL_506_12_df** - Alma will extract subfields d and subfield f from 506 field only when indicators 1 and 2 exists. Each subfield will be delimited from the next one with a space.
- **HOL_506_1#_g** - In this scenario, Alma will extract subfields g from 506 field only when the first indicator value is 1 with no dependency on the second indicator.

A sample URL template may be: `<baseURL>?LIB={library}&BARCODE={barcode}&FIELD1={HOL_506_ab}`.

4. Select **Add and Close**. The new service appears on the General Electronic Service page with the following row actions: **Remove** and **Edit**.
5. Edit the new row to configure additional service details. The Service Details page appears.

6. To display this service to signed-in users only, select No in the Enable without login field.

7. To display this service based on the availability of the physical resource in the institutional repository, select one of the following options for Disable Service:

   - Never – The service is never disabled.
   - When resource is owned by the campus – The service is disabled when physical items for the resource are owned by the campus.
   - When resource is owned by the campus and available – The service is disabled when physical items for the resource are owned by the campus and are available (that is, they are not involved in a process).
   - When resource is owned by the institution – The service is disabled when there are physical items for the resource that are owned by the institution.
   - When resource is owned by the institution and available – The service is disabled when there are physical items for the resource that are owned by the institution, are in place, and are in an open location. Note that if a physical location is set to Unavailable (see Adding a Physical Location) and this option is selected, the service is enabled. You may want to use this option when items in a certain location (such as a reading room) cannot be requested. Setting this location to Unavailable will enable the display of the service.

8. Select the Service Availability Rules tab.

   The Service Availability Rules tab displays the rules that the system uses to determine whether a service should
appear for the user. Each service has a default rule that is applied when none of the other rules apply. By default, the system does not display the service (IsDisplay=False). You can edit the default rule and add rules as needed.

9. Add rules regarding the OpenURL context object attributes (which may be returned by Alma’s link resolver during the user’s search) to ensure that Alma has the necessary information to display the service.

Note

- The available attributes are standard OpenURL attributes. For more information, see Commonly Used OpenURL Attributes for the URL Template.
- The following item level attributes may be used when item level services are configured:
  - material_type
  - item_policy - values are populated from the institution's Item Policy table. See Configuring Item Policies.
  - process_type
  - base_status - values are Item not in place and Item in place.
- Adding parameters within a rule will cause the parameters to have an AND relationship with each other, meaning that all values must be true before the rule is considered true. For OR conditions, where only one of values must be true, parameters should be entered separately in a new rule.
- If multiple rules evaluate to true, the output parameter will be applied based on the first rule that is true.

1. To add a new rule, select Add Rule. The Edit Rule page opens.
2. In the **Edit Rule** section, enter the rule name (required) and description (optional).

3. In the Input Parameters section, select **Add Parameter**. The Add Parameter dialog box opens.

4. Enter the following fields:
   - **Name** – The name of the attribute in the OpenURL context object. For more information about these attributes, see [Commonly Used OpenURL Attributes for the URL Template](#).
   - **Operator** – The comparison operator to use with this context object attribute.
   - **Value** – An accepted value for this parameter. To match multiple values, create a separate rule for each value. Note that not all operators require a value.

5. Select **Add Parameter**. The parameter is added to the input parameter list.

6. In the **Output Parameters** section, set **IsDisplay** to **true**.

7. Select **Save**. The Service Availability Rules page displays the new rule.
10. Select **Save**. The General Electronic Services page displays the new service.

In a collaborative network, you can create general electronic services in the Network Zone and then distribute them to member institutions. The member institutions have view permission to the distributed records but are not able to edit or delete them. When the Network Zone general electronic service has been distributed, the local list will show either the distributed records only or both the distributed records and the previous local general electronic service records, depending on the configuration in the customer parameter, `network_ges_distribution_members_behavior`.

![General Electronic Services List for a Member Institution](image)

For more information, see [Configuring Fulfillment Information in the Network Zone](#).

### Commonly Used OpenURL Attributes for the URL Template

The OpenURL attributes returned from Alma’s link resolver are grouped by the following general categories:

<table>
<thead>
<tr>
<th>OpenURL Attribute Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Category</strong></td>
</tr>
<tr>
<td>Requester</td>
</tr>
<tr>
<td>ReferringEntity</td>
</tr>
<tr>
<td>Referent</td>
</tr>
<tr>
<td>ServiceType</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

The following are commonly returned attributes that can be used to create service availability rules:

<table>
<thead>
<tr>
<th>Commonly Returned OpenURL Attributes from Alma’s Link Resolver</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Attribute</strong></td>
</tr>
<tr>
<td>req_id</td>
</tr>
<tr>
<td>rft.advisor</td>
</tr>
<tr>
<td>rft.applcc</td>
</tr>
<tr>
<td>rft.appldate</td>
</tr>
<tr>
<td>Field</td>
</tr>
<tr>
<td>---------</td>
</tr>
<tr>
<td>rft.applyear</td>
</tr>
<tr>
<td>rft.artnum</td>
</tr>
<tr>
<td>rft.assignee</td>
</tr>
<tr>
<td>rft.atitle</td>
</tr>
<tr>
<td>rft.au</td>
</tr>
<tr>
<td>rft.aucorp</td>
</tr>
<tr>
<td>rft.aufirst</td>
</tr>
<tr>
<td>rft.auinit</td>
</tr>
<tr>
<td>rft.auinit1</td>
</tr>
<tr>
<td>rft.auinitm</td>
</tr>
<tr>
<td>rft.aulast</td>
</tr>
<tr>
<td>rft.ausuffix</td>
</tr>
<tr>
<td>rft.bici</td>
</tr>
<tr>
<td>rft.btitle</td>
</tr>
<tr>
<td>rft.cc</td>
</tr>
<tr>
<td>rft.chron</td>
</tr>
<tr>
<td>rft.co</td>
</tr>
<tr>
<td>rft.coden</td>
</tr>
<tr>
<td>rft.date</td>
</tr>
<tr>
<td>rft.day</td>
</tr>
<tr>
<td>rft.dcContributor</td>
</tr>
<tr>
<td>Field</td>
</tr>
<tr>
<td>-------------</td>
</tr>
<tr>
<td>rft.dcCreator</td>
</tr>
<tr>
<td>rft.dcDescription</td>
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<tr>
<td>rft.dcFormat</td>
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<tr>
<td>rft.dcIdentifier</td>
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<tr>
<td>rft.dcLanguage</td>
</tr>
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<td>rft.dcRelation</td>
</tr>
<tr>
<td>rft.dcRights</td>
</tr>
<tr>
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<td>rft.dcSubject</td>
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<td>rft.dcTitle</td>
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<tr>
<td>rft.dcType</td>
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<td>rft.epage</td>
</tr>
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<td>rft.format</td>
</tr>
<tr>
<td>rft.genre</td>
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<tr>
<td></td>
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<td></td>
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<tr>
<td></td>
</tr>
</tbody>
</table>
conference papers)

- **issue**: single issue
- **preprint**: paper or report published in print or electronically prior to publication in journal or serial
- **proceeding**: conference presentation published in a journal or serial publication
- **report**: report or technical report published by an organization, agency, or governmental body
- **unknown**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>rft.inst</td>
<td>Issuing institution, for a dissertation</td>
</tr>
<tr>
<td>rft.inventor</td>
<td>Inventor's full name: &quot;Smith, John J.&quot;. For a patent.</td>
</tr>
<tr>
<td>rft.invfirst</td>
<td>Inventor's given names: &quot;John J.&quot;. For a patent.</td>
</tr>
<tr>
<td>rft.invlast</td>
<td>Inventor's last name: &quot;Smith&quot;. For a patent.</td>
</tr>
<tr>
<td>rft.issn</td>
<td>International Standard Serial Number. May contain a hyphen. ISSN for a book may be associated with the series.</td>
</tr>
<tr>
<td>rft.jtitle</td>
<td>For the LDR positions, see Fields that Identify the Bibliographic Material Type.</td>
</tr>
<tr>
<td>rft.kind</td>
<td>Patent kind code, for a patent: &quot;AU A1&quot;. Kind codes are meaningful within the country of origin.</td>
</tr>
<tr>
<td>rft.month</td>
<td>Publication month</td>
</tr>
<tr>
<td>rft.number</td>
<td>Application number, for a patent</td>
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<tr>
<td>rft.object_type</td>
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</tr>
<tr>
<td>rft.oclcnum</td>
<td>OCLC control number or journal level OCLC number. May be multiple OCLC control numbers, separated by commas.</td>
</tr>
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</tr>
<tr>
<td>rft.part</td>
<td>Either a subdivision of, or in place of, volume. Examples: &quot;B&quot;, &quot;Supplement&quot;.</td>
</tr>
<tr>
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<tr>
<td>------------------------</td>
<td>------------</td>
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<td>addata/cop</td>
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<tr>
<td>rft.prioritydate</td>
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<tr>
<td>rft.pub</td>
<td>addata/pub</td>
</tr>
<tr>
<td>rft.pubdate</td>
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</tr>
<tr>
<td>rft.publisher</td>
<td>addata/pub</td>
</tr>
<tr>
<td>rft.pubyear</td>
<td>addata/pub</td>
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<tr>
<td>rft.quarter</td>
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<td>addata/seriesitle</td>
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<td>addata/sici</td>
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<td>rft.spage</td>
<td>addata/spage</td>
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<td>rft.ssn</td>
<td>addata/ssn</td>
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<tr>
<td>rft.title</td>
<td>245 a,b</td>
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<td>rft.tpages</td>
<td>addata/volume</td>
</tr>
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<td>rft.volume</td>
<td>addata/volume</td>
</tr>
<tr>
<td>svc.abstract</td>
<td>addata/volume</td>
</tr>
<tr>
<td>svc.any</td>
<td>addata/volume</td>
</tr>
<tr>
<td>svc.citation</td>
<td>addata/volume</td>
</tr>
<tr>
<td>svc.fulltext</td>
<td>addata/volume</td>
</tr>
<tr>
<td>svc.holdings</td>
<td>addata/volume</td>
</tr>
<tr>
<td>svc.ill</td>
<td>addata/volume</td>
</tr>
</tbody>
</table>
Displaying Historical Loans in Primo

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

By default, Alma does not send historical loan information to Primo to be displayed in My Account > Loans. You must set the view_historical_loans_in_primo parameter to true in the Customer Parameters mapping table in Alma; see Configuring Other Settings.

List of Historical Loans

For information on configuring the display of loans in Primo, see Configuring the Loans View.

Note
Make sure that historical loans are tracked in Alma by setting the should_anonymize_item_loan parameter to false.
Displaying the Maximum Renewal Date in Primo

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

Return to menu

The max_renew_date field (which is enabled on the My Account > Loans Details page out of the box) is defined in the Loans Detailed Display mapping table under the OPAC via Primo subsystem in the Primo Back Office. Because the List of Loans pages display a limited number of columns in the classic UI, many fields including this one will not display. To display the max_renew_date field, it must replace one of the other fields.

In the following example, we will replace the Potential Fine column with the Max Renewal Date column.

To display the max_renew_date field on the Active List of Loans page:

1. Edit the Loans List Configuration mapping table (Primo Home > Advanced Configuration > All Mapping Tables).
2. Customize the following row to replace the Potential Fine column:

   ![Loans List Configuration Mapping Table](image)

   Loans List Configuration Mapping Table

3. Change the Description field to max_renew_date.
4. Save and deploy your changes.

Note
This configuration is not necessary in the new UI since the display of the fields is not limited by the number of display columns on the List of Loans pages.

Active List of Loans - Classic UI
5. Edit the Loans List Labels code table (Primo Home > Advanced Configuration > All Code Tables).

6. Customize the following row to replace the Potential Fine column:

7. Change the Description field to Max Renewal Date.

   In addition, you can change the label for this field on the Details of Loan page by modifying the description for the following code:

   default.loans.max_renew_date – Maximum renewal date:

8. Save and deploy your changes.

9. The List of Active Loans should display as follows:
For signed-in users, Primo allows you to display a link in the Main menu that allows users to access their main reading list in Leganto.

To enable the Leganto link:


2. Continue to the Tile Configuration page and edit the Main Menu tile under Home Page.

3. In the Create a New Label section, specify the following fields:
   
   ◦ **Label** – Type **leganto**.
   
   ◦ **URL** – Enter the URL for Leganto using the following format:
     
     <alma_base_url>/leganto/readinglist/
     lists?auth=<auth_type>&institute=<alma_institution_code>
     
     ▪ **alma_base_url** – Specify the base URL that you use for Alma. For example: https://<my_university>.alma.exlibrisgroup.com
     
     ▪ **auth_type** – Specify the type of authentication that you are using. The following types are supported: CAS, SAML, and local (which is used for LDAP).
     
     ▪ **alma_institution_code** – Specify Alma’s institution code.
     
     ◦ **Link should open in** – Select one of the following display options: **current window** or **new window/tab**.

4. Select **Add**.

5. Select **Save & Continue**.

6. Deploy the changes to the Front End.
Configuring the Template for the Location Map Link

Alma allows you to define the template that is used for the location map link in Primo Get It.

To define the location map link template in Alma:

1. On the Integration Profile List page (Configuration Menu > General > External Systems > Integration Profiles), select **Add Integration Profile** to open the External System page.

2. Enter the following required fields:
   - **Code** – Enter a code for discovery interface.
   - **Name** – Enter a name for the discovery interface.
   - **Integration Type** – Select **Discovery Interface** from the drop-down list.

3. Select **Next**.

4. In the Actions section, enter the following fields:
   - **URL template** – Enter the template link to the location map. The following parameters can be included in this field (surrounded by {}): library_code, location_code, location_name, call_number, title, lang.
   - **Supported libraries** – Select the libraries that support the location map in the drop-down list.
   - **Excluded location** – If you want to exclude specific locations within a supported library, select the locations from the drop-down list.

   **Note**
   You cannot assign a library to more than one discovery interface.

5. Select **Save**.
Alma as a Source of Holdings Information for Central Discovery Index/Primo Central

The search results for records that are retrieved from Central Discovery Index / Primo Central contain a status that indicates whether full text is available for a specific institution. For example:

![Primo Central Results - Availability Indicators](image)

For information on how to publish the holdings information to Primo Central, see [Publishing to Primo Central](#).

For information on how to publish the holdings information to Central Discovery Index, see [Publishing Electronic Records to Central Discovery Index](#).
Alma and Patron Directory Services

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

This section includes:

- Introduction
- Identify Patrons to Provide Relevant Services
- Alma as the Patron Directory for Authentication
Introduction

Note

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

Return to menu

It should be noted that the Patron Directory Services server (PDS) is configured on the Primo side and that this section describes only the interaction Alma has with Primo’s PDS. This interaction serves the following purposes:

- Identifies patrons accessing Alma from Primo in order to provide the relevant services in the View It and Get It tabs.
- If Alma serves as the patron directory for authentication (such as LDAP, for example), Primo's PDS can use Alma’s `bor_auth` and `bor_info` APIs to authenticate users.

Note

The preferred method is to configure Primo to use external authentication systems instead of Alma’s system to manage patron authentication.
Identify Patrons to Provide Relevant Services

Note

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

Return to menu

The following figure illustrates the authorization/authentication process used between Alma and Primo's PDS:

Alma - Primo Authentication Flow

After Alma receives a Get It or View It request, it sends a bor-info request to Primo's PDS, as follows:


In return, Alma receives an XML response, as follows:

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<bor>
  <bor_id>
    <id>exl_support</id>
    <handle>23820123442435521060831483217</handle>
    <institute>university</institute>
  </bor_id>
  <bor-info>
    <id>exl_support</id>
    <institute>university</institute>
    <name>exl_support</name>
    <group>STAFF</group>
  </bor-info>
</bor>
```
The ID attribute coming from PDS bor-info should match the Primary identifier as defined in on the User Details page in Alma (see Managing Users).

---

**PDS Configurations**

This section describes the configurations that may be necessary in order for Alma to interact with Primo’s PDS. For information regarding Alma and Primo sandboxes, see Alma Sandbox Environments and Alma-Primo Sandbox Integration.

**Configuring the PDS URL**

To identify patrons, Alma must point to the relevant PDS server (see #4 in the figure above). This is configured by entering the URL of the PDS in the `primo_pds_url` parameter (see Configuring Other Settings).

For example:

http://primo.exlibrisgroup.com/pds?

or

https://primo.exlibrisgroup.com/pds?

---

**Note**

Make sure that there is a question mark (?) at the end of the URL.

---

**Configuring the PDS bor-info Function**

In the PDS, the bor_info function should be configured to retrieve the following mandatory fields:

- **Name** – The user name
- **ID** – The user ID
- **email_address** – The user email address
- **Institute** – The institution code

This should be checked especially when working with LDAP authentication. To configure the above, see the Patron Directory Services Guide.

**To test the PDS configuration:**

1. Open the Primo Front End in a browser, but do not sign in.
2. Perform a search.
3. In a brief result, select Get It.

   No request options should display, and the following message should display in the Get It tab:

   You must sign in to get Request options

4. Select **Sign in** and enter your login information.
5. Perform a search.
6. In a brief result, select **Get It**.

The request options should display, and you should no longer get the message to sign in. If not, check the PDS log on the Primo server to see whether the bor-info request was sent from Alma and to see whether the bor-info response included the required attributes (name, institute, and so forth).

7. Select **My Account** and then select the **Personal Settings** tab.

You should see user details. If this is not the case, check the PDS log on the Primo server to see whether the bor-info request was sent from Alma and to see whether the bor-info response included the required attributes (name, institute, and so forth).
Alma as the Patron Directory for Authentication

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

PDS Configurations
This section describes the configurations that may be necessary in order for Alma to interact with Primo’s PDS.

Applying the Version Fix to PDS
If Primo’s PDS version is less than 2.1.1, you must apply the following fix in the PDS code.

To apply the fix:

1. Enter the following commands to edit the CallHttpd.pm file:
   ```
   pdsroot
   cd program
   vi CallHttpd.pm
   ```

2. Delete the following line from the CallHttpd.pm file:
   ```
   'Accept-Encoding' => 'gzip, deflate',
   ```

3. Save the changes to the file.

4. Enter the following commands to restart the Apache server:
   ```
   apcb
   ./apachectl stop
   ./apachectl_auto
   ```
Configuring the Calling Institution

If the PDS configuration uses Alma as the patron directory for authentication and authorization, you must create a tab_service file for your institution by either creating the file manually on the server or using the PDS Wizard in the Primo Back Office.

The tab_service.<institute> file defines the services that are required from the PDS for an institution. There is one file for each institution.

**Note**

The PDS is configured on the Primo side.

To create the tab_service file manually:

1. Enter the following commands, to create tab_service.<institute> file:

   ```
   pdsroot
   vi tab_service.<institute>
   ```

2. Enter the AUTHENTICATE, BOR_INFO, and INSTITUTE DISPLAY sections for your institution. For example:

   ```
   [AUTHENTICATE]
   program = dps.pl
   params = <Alma domain>.exlibrisgroup.com,80,BOR_AUTH,N
   [END]

   [BOR_INFO]
   program = dps.pl
   params = <Alma domain>.exlibrisgroup.com,80,BOR_INFO,N
   [END]

   [INSTITUTE DISPLAY]
   code = university
   desc = university institution
   lang = ENG
   primo = UL
   [END]
   ```

   **Note**

   Currently, the system authentication method's name is Rosetta. However, it is used for Alma as well.

3. Save your changes to the file.

To create the tab_service file with the PDS Wizard:

1. On the Primo Home > Ongoing Configuration Wizards > PDS Configuration Wizard page, select your institution.
2. Use your login information to enter the wizard.
3. Continue with the wizard and define the authentication method. Currently, the wizard uses Rosetta as the application
method for Alma.

Define the AUTHENTICATE Section

4. Continue with the wizard and define the bor-info attributes. Currently, the wizard uses Rosetta as the application method for Alma.

Define the BOR-INFO Section
To test the PDS configuration:

1. Open the Primo Front End in a browser, but do not sign in.
2. Select My Account and then select the Personal Settings tab.
   No personal settings should display.
3. Select Sign in and enter your login information.
4. Select My Account and then select the Personal Settings tab.

You should see user details. If you do not, verify that the PDS bor-info is working by entering the following URL in your browser:

Making the Primo Front End Read Only

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

This section describes the steps required to make the Primo Front End read-only, which consists of hiding features that interact with the external system or user data, such as the following features:

- OPAC via Primo requests
- Access to My Account
- Creating new tags
- Creating or editing reviews
- Saving queries
- Adding items to the e-Shelf basket (as an authenticated user)
- Ordering items in the Main menu

This may be useful during the cutover period when changing your current ILS to Alma.

To make the FE read-only:

1. Create a file called readonly.css and include the following information:

```css
/* Readonly Attributes */
/* Hide the e-shelf feature */
.EXLMyShelf,.EXLResultsList td.EXLMyShelfStar,.EXLFacetContainer
div.EXLFacetActionsV2 li.EXLFacetSaveToEShelfAction,.EXLTabHeaderButtons
ol.EXLTabHeaderButtonSendToList li.EXLButtonSendToMyShelf {display: none;}
/* Hide the My Account feature */
.EXLMyAccount {display: none;}
/* Hide the ability to add new Tags and reviews and to view your reviews and tags */
.EXLTagsContainer p:first-child,.EXLReviewsContent p:first-child, div#myTags,
.EXLTagsPageRecentTags,.EXLReviewsContent cite {display: none;}
/* Hide the ability to place requests */
.EXLTabsRibbon div li.EXLRequestTab {display:none;}
.EXLLocationTableActions {display:none;}
.EXLLocationTableHeaderActions {display:none;}
/* Hide the ability to save queries */
.EXLFacetContainer div.EXLFacetActionsV2 li.EXLFacetSaveSearchAction {display:
none;}
/* Create a readonly banner that displays a read-only message at the top of the
Front End */
div.readonly {padding: 0px; margin: 0px 0px 0px 0px; font-size: 80%;
border-bottom: 1px solid #E1E1E1; border-top: 1px solid #E1E1E1;
}
```

If you are working with Primo VE, see Primo VE for more details.
2. Save the file to the server. If you do not have access to the server, use the File Uploader utility (Primo Home > Primo Utilities) to upload the file.

3. Edit the CSS mapping table (Primo Home > Advanced Configuration > All Mapping Tables > Front End subsystem).

4. In each mapping row, append readonly.css to the list of CSS files in the CSS URL field. For example: Primo_default.3.0.css;../uploaded_files/<YOUR_VIEW>/readonly.css

5. Save and deploy your changes to the mapping table.

6. Edit the Static HTML file that you use for the header and add the following text:

```html
<script type="text/javascript">
    // To be added in your static HTML file header during the Alma cutover period
    //<![CDATA[
    (function() {
        // You can customize the message if you want
        var mess = 'Due to system upgrade some services may not be available. Please contact library staff for additional information and services.';
        $('body').prepend('<div class="readonly">' + mess + '</div>');
    })();
    //]]>
</script>
```

7. Save the modified static HTML file to the server. If you do not have access to the server, use the File Uploader utility (Primo Home > Primo Utilities) to upload the file. In the FE, you should see the message at the top of the page: