Objectives

By the end of this session you will understand:

• The main aspects of Alma-Primo interoperability
  • Publishing
  • Delivery
  • Alma as Link Resolver/ERM
• How to setup Alma for Primo / Primo for Alma
Agenda

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

Alma and Primo – the big picture
Alma and Primo

Alma: Catalog, ERM, DRM

Primo: Search Engine User Interface (Database)

Alma: ERM

Alma: Services

Service Page

Alma: Central

Primo Central

Alma: ERM

Other SE (Google Scholar)

Publishing

Delivery

Holdings

Alma-Primo Basics

- Configuring the Primo Institution – documentation
- Configuring the Primo institution - example
Alma-Primo: Publishing

- Alma record structure → Primo
- The publishing process
- Suppressing records
- Key fields in published Alma record
- Key fields in normalizing to the PNX
- Deduping Alma records in Primo

Alma Data Structure: Institution Zone

MMS (BIB)

IE – Physical
IE – Electronic
IE – Digital
Holdings and Items
Portfolios
Representations
### Alma Data Structure: Institution Zone

- Chemistry Handbook
- IE – Physical
- IE – Electronic
- IE – Digital
- Holdings and Items
- Portfolios
- Representations

### Alma Publishing to Primo: at the IE level

- Alma
  - MMS (MMS ID=1234)
  - Electronic Holdings (ID=876)
  - Print Holdings (ID=567)

- Primo
  - Electronic Record ID=876 (MMS=1234)
  - Print Record ID=567 (MMS=1234)
  - Dedup record
    - Print+Electronic (based on MMS ID)
**Publishing Modes**

**Full Publishing:**
- Initial publishing of all Alma data (typically at the beginning of the project)

*once completed automatically changes to:*

**Incremental Publishing:**
- On-going publishing of new, updated and deleted records several times a day
Publishing sets of record ad hoc

- In principle any change that affects the content of the published record should trigger standard re-publishing

- This job can be useful if you want to change the content of published records. For example - add Course Reserve information to Primo
  - In Publishing Profile → check “Course Information”
  - Create set of records linked to a course
  - Run job

Suppress Records from Publishing

Suppress individual bibliographic and holdings records from publishing
Suppress Records from Publishing

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

- Suppress Print inventory with specific process status

**Job: Suppress BIB records from Discovery**
Publishing in Primo

• Data source – one per Alma institution

• Normalization rules → PNX
  • Use the Alma MARC/DC Template as basis for creating your own rules

• Pipe
  • Regular
  • “Update pipe”

• Dedup – important to dedup based on MMS

Key Fields

• IE-ID – sent in the header
• 001 – MMS ID
• INST – institution
• INT – entity type: Physical / Electronic / Digital / Collection
• AVA – physical inventory per location
  • $$a$ – Institution code
  • $$b$ – Library code
  • $$c$ – Location display name
  • $$d$ – Call number
  • $$e$ – Availability (available, unavailable, or check_holdings)
  • $$j$ – Location code
  • $$k$ – Call number type
  • $$p$ – priority
Deduping Alma Records

- Dedup based on MMS to merge E/P/D linked to same MMS
- MMS added to C5.
- Match on C5 is first step in dedup process
- If you want to disable dedup – keep match on C5 and disable creation of other keys

Key Fields

- CNO – course information
- ECT – indicates if the record is a database
- PLK – links between records
- Cross-references can be included in Author and Subject fields
- AVD - for D inventory. Not used OTB
  - $a – Institution code
  - $b – Representation PID
  - $c – Representation type: REPRESENTATION or REMOTE_REPRESENTATION
  - $d – Remote repository name (if this is a remote representation)
  - $e – Representation's label
  - $f – Public note
- AVE - for E-inventory acquired centrally
  - $i – contains a single e-resource's Available for institution code
  - $c – contains a single e-resource's Available for campus code
  - $l – contains a single e-resource's Available for library code
### Normalizing Alma Records

<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control</td>
<td>almaid</td>
<td>Combines Alma institution code and IE-ID. E.g: 01BC_INST:2110003770001021 Used in requests for Alma services</td>
</tr>
<tr>
<td>Display</td>
<td>availlibrary</td>
<td>Based on AVA</td>
</tr>
<tr>
<td></td>
<td>crsinfo</td>
<td>For course reserve information. Based on CNO</td>
</tr>
<tr>
<td></td>
<td>type</td>
<td>ECT=&quot;database&quot;</td>
</tr>
<tr>
<td>Links</td>
<td>thumbnail</td>
<td>For Alma-D</td>
</tr>
<tr>
<td>Search</td>
<td>searchscope</td>
<td>For AZ list For collections</td>
</tr>
<tr>
<td></td>
<td>General</td>
<td>MMS</td>
</tr>
</tbody>
</table>

### Normalizing Alma Records

<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facets</td>
<td>AZ</td>
<td>For Journal A-Z list</td>
</tr>
<tr>
<td></td>
<td>crsname, crsinst crsid, crsdept</td>
<td>Facets for course reserves</td>
</tr>
<tr>
<td>Dedup</td>
<td>C5</td>
<td>For MMS</td>
</tr>
<tr>
<td>Delivery</td>
<td>institution</td>
<td>INST</td>
</tr>
<tr>
<td></td>
<td>delcategory</td>
<td>INT</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• P → Alma-P</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• E → Alma-E</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• D → Alma-D</td>
</tr>
<tr>
<td>Display</td>
<td>creator, contributor, subject, title, uniform title</td>
<td>Suppression of non-preferred</td>
</tr>
<tr>
<td>Sort</td>
<td>FRBR</td>
<td></td>
</tr>
<tr>
<td>Facets</td>
<td>Dedup</td>
<td></td>
</tr>
<tr>
<td>FRBR</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Sample Records

- **Alma Demo** (primo_alma*)

IZ Published Record

```
<controlfield tag="001">992234070001021</controlfield>
<datafield tag="OWN" ind1=" " ind2=" ">
  <subfield code="a">OL</subfield>
</datafield>
<datafield tag="INT" ind1=" " ind2=" ">
  <subfield code="a">P</subfield>
</datafield>
<datafield tag="INST" ind1=" " ind2=" ">
  <subfield code="a">O1BC_INST</subfield>
</datafield>
<datafield tag="AVA" ind1=" " ind2=" ">
  <subfield code="a">01BC_INST</subfield>
  <subfield code="b">GOV</subfield>
  <subfield code="c">Stacks</subfield>
  <subfield code="d">L 2.71:455-4</subfield>
  <subfield code="e">available</subfield>
  <subfield code="f">1</subfield>
  <subfield code="g">0</subfield>
  <subfield code="j">STACK</subfield>
  <subfield code="k">3</subfield>
  <subfield code="p">1</subfield>
</datafield>
```
IZ Published PNX

<control>
<sourceid>primo_alma2110001860001021</sourceid>
<recordid>primo_alma2110001860001021</recordid>
<originalsourceid>01BC_INST</originalsourceid>
<sourceformat>MARC21</sourceformat>
<sourcesystem>Alma</sourcesystem>
<almaid>01BC_INST:2110001860001021</almaid>
</control>
<display>
<availability>$I01BC_INST$LGOV$1Stacks$L 2.71:455-4$Savailable</availability>
<availability>$S01BC_INST$Savailable</availability>
<availability>$S01BC_INST$Savailable</availability>
</display>
<search>
<searchscope>AZ01BC_INST</searchscope>
<facets>
<atoc>C</atoc>
</facets>
</search>
<dedup>
t1</t>
<atoc>consumerexpenditurescteristics</atoc>
<atoc>1977</atoc>
<atoc>992234070001021</atoc>
<atoc>consumerexpenditurescteristics</atoc>
<atoc>1977</atoc>
<atoc>consumer expenditure survey series interview survey 1972 73 average annual income and expenditures for commodity and service groups classified by family characteristics</atoc>
</dedup>
<delivery>
<institution>01BC_INST</institution>
<delcategory>Alma-P</delcategory>
</delivery>
Alma – Primo: Delivery

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

Alma Delivery

Alma Services

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

Demo
Identifying Patrons

- Users sign-in to Primo (PDS or Primo Authentication Manager)
- Users place requests in Alma – how does Alma identify the user?

![Diagram]

- PDS/Primo Authentication URL should be added to: Administration > General Configuration > Configuration Menu > General Configuration > Other Settings > primo_pds_url

Key Concepts in Primo Delivery

- Availability
  - P – based on circulation status
  - E – restricted / not restricted → based on restricted delivery scopes
  - D – restricted / not restricted → based on restricted delivery scopes
  - Primo Central – based on full-text availability

- Delivery:
  - GetIt 1 – main delivery option
  - GetIt 2 – secondary delivery option
  - Delivery is defined per “Delivery Category” and “Availability status”
Delivery Categories

- Local Data ingested from Alma:
  - P inventory → Alma-P
  - E inventory → Alma-E
  - D inventory → Alma-D

- A record will be assigned up to two delivery categories so that both electronic and physical are represented.
  - Every delivery category will be represented in availability
  - Every delivery category will be assigned a Get It

- Primo Central records: Remote Search Resource

Physical Availability and RTA

- Based on status in AVA ($$e) : available, check_holdings, unavailable

- Retrieved in real time using “RTA” in same format as published record
  - Alma normalization rules set must be defined in “Real-Time Availability (using normalization rules)”

- Calculated availability status
  - If at least one AVA = “available” → available_in_maininstitution
  - If at least one AVA = check_holdings” → check_holdings_in_maininstitution
  - Else → “unavailable_in_maininstitution”

- Labels are defined in “Calculated Availability Status”

- Display of “Best Location”
  - Determined based on location that matches status and then priority in AVA $$p
**Availability for E/D - Restricted Delivery Scopes**

- Tag on PNX to indicate access is restricted – if user does not meet conditions the status will be “restricted”

- How to setup?
  - Define as scope of type “Delivery” → Scope Values definition
  - Add to the normalization rules → in Delivery section
  - Defined allowed users → “Restricted Delivery Scopes”

**Delivery Setup in Primo**

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

- View it and Get It skins
- Labels
- Display Logic
- General Electronic Services
- Physical inventory
  - Holdings record display
  - Location priority
  - Item sort routines
- Electronic inventory
  - Order of services
  - Direct Linking
  - Related Services
  - License display
- Digital inventory
  - Max number of representations

**View it and Get It skins**

- Defines CSS for the View it and Get It
- Administration → General Configuration → User Interface Settings → Delivery System Skins
- Skin ID should = Primo View ID
  - Else the skin ID needs to be added to the Viewit and GetIt delivery templates
  - Classic/New UI – flag indicating if skin is for classic or new
  - Can be problematic if same view is used since the templates are shared between classic and new UI
  - Solution: create separate views.
  - Future: Alma will enable single Skin ID for both classic and new
### Labels

- Fulfilment Configuration → Discovery Interface Display Logic → Labels

### Display Logic

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

• Lets customers add services (not unlike Primo “links”)

• Fulfillment Configuration ➔ Configuration Menu ➔ Discovery Interface
  Display Logic ➔ General Electronic Service & General Electronic Services
  Order

Electronic Inventory

• Fulfillment Configuration ➔ Configuration Menu ➔ Discovery Interface
  Display Logic:
  • Order: ➔ Online Services Order
  • Direct linking: ➔ Direct Linking
  • Display License ➔ Other setting
  • Related Services ➔ Related Records
**Digital Inventory**

- Fulfillment Configuration → Configuration Menu → Discovery Interface Display Logic → Other options
- Max. number of representation in View IT
  - After this number View It will open in a new tab, filters will display

**Physical Inventory**

- Holdings record display
  - 852, 866, 867 always display
  - To display 541, 561, 563, 868
    - Fulfillment Configuration → Discovery Interface Display Logic → Other Settings → display_additional_holding_fields_in_getit set to ‘true’

- Location Priorities
  - Fulfillment Configuration → Discovery Interface Display Logic → Locations Ordering Profiles

- Item sort routines
  - Resource Management Configuration → General → Physical Items Sort Routines
Alma as Link Resolver / ERM

- Publish holdings to Primo Central
- The Services Page

Publish Holdings to Primo Central

- Publish Alma data to Primo Central

*Specify in the Registration system the location of the holdings file*
The Alma Services Page

Example

- Example
### Services Page Base URL

- Classic and New UI:  
  http://primo server host/openurl/<primo institution_code>/<primo view_code>?

- For NUI – must set “New UI Enabled”

### Services Page - Configuration

- Classic UI – required a separate
  - Step 1 - Create Primo view by copying it from the default services page view
  - Step 2 – Configure View

- New UI – separate view not required
Services Page Delivery:
• Delivery category – Remote Search Resource
• Availability statuses:
  • viewit_FT
  • viewit_getit_NFT
  • viewit_getit_FT
  • viewit_getit_NFT
  • getit

Alma-Primo: Some additional interoperability points
• Browse
• Course Reserves
• Linking Records
• Collection Discovery
Browse

Select the list to browse:
- Author
- Title
- Subject
- Library of Congress call number
- NJM call number
- Dewey call number
- SUDOC call number
- Other call number

Advanced Search

No. of records
- Entry

ABC
- See: Africa Bibliographic Centre, Wydawnictwo ABC, African Bibliographic Centre
1
- ABC (A Better Chance)
- ABC active 19th century
- See: A. B. C., active 19th century
- ABC active 19th century
- See: A. B. C., active 19th century
- ABC American Botanical Council
- See: American Botanical Council
- ABC (Architectural Cross)
- See: Architectural Cross
4
- ABC Architectural
1
- ABC Architectural Styles
1
- abc art bellev contemporary (MAP)
- ABC Australia
- See: Australian Broadcasting Corporation
- ABC Brazil
- See: Academia Bibliotécica de Clínicas
2
- ABC Canada
1
- ABC Cinema

Browse: Setup in Alma

226
- Is primo publishing heading enrich

Re-publish to Primo
Setup in Primo

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

Course Reserves

- Generally set up as a separate search scope/tab
- Facets per course name, instructor, department
- Search indexes per course name, instructor, department

- Example
Setting up Course Reserves - Alma

• CR data must be enabled in the Primo Publishing Profile

• CNO includes:
  • $$b – Start date
  • $$c – End date
  • $$e – Department name
  • $$f – Department code
  • $$g – Course instructors
  • $$j – Course name
  • $$k – Course code and section
  • $$l – Academic department
  • $$o – Searchable IDs
  • Note: CNO field is published for active courses only. Alma process ‘Activate/Deactivate Courses’ must run daily in order to activate and deactivate courses. Should be enabled by the customer.

Setting up Course Reserves – Primo

• Alma MARC Template – includes rules for adding:
  • Display – Course Reserves Info
  • Facets – Course ID/Name, instructor, department
  • Search - Course ID/Name, instructor, department

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

• Add search scope and tab with Course facets/indexes to your view
Course Reserves – “CR_RESTRICTED”

- Records that are cataloged specifically for course reserves can be tagged as being “CR_RESTRICTED”
- This tag will be added to the local field defined in Resource Management -> Resource Configuration -> Configuration Menu -> Other Settings

CR_RESTRICTED in Primo

- Used to create a “Restricted Search Scope” and limit discovery to registered users (on campus or signed-in)
  - Define scope as being “Restricted Search”
  - Define scope in Search/Restricted Search Scope
  - Define allowed users in Restricted Search definitions

- Can be used to prevent these records from being discovered in main institution scope
  - Add a condition to main institution scope (or create a new one)
    - False / CNO exists
    - AND
    - False / <local field>=“CR_RESTRICTED”
Linked Records?

• Typical examples from traditional library resources:
  • Earlier/later title for journals (tags 780/785)
  • Analytics – parts of a whole (tags 773/774)

• Example (Manchester)

Linking Data in Records Harvested from Alma

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

- PLK – created for export to Primo:
  - $a type
  - $b MMS
- To include PLK fields the option “Related Records information” must be checked in the Primo Publishing Profile
In Primo

• Create links using the 1Ds30-39/lsr30-30 fields

• Works same as other lateral links (author, title):
  • Content displayed – is searched in parallel index. For example:
    • display/lds30 <record ID>
    • Searches for <record ID> in the search/lsr30 index

Using lDs30-9/lsr30-9: Setup

• Documentation:
  • Technical Guide > Additional Configurations > Creating Lateral Links for Local Fields

• Setup:
  • Search Engine Configuration – Results Threshold – Number of active local fields in search section
  • Increase and deploy Search Engine Configuration
What can be done?

- Link based in MMS ID of parent; direction determined by prefix

<table>
<thead>
<tr>
<th>Field</th>
<th>Parent Record</th>
<th>Child Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source</td>
<td>Source Parent Record</td>
<td>001 = MMS of child PLK $a contains $b &lt;parent MSS&gt;</td>
</tr>
<tr>
<td>Ids31</td>
<td>DN &lt;MSS of parent&gt; Take MSS of parent from 001 if PLK $a = &quot;part of&quot;</td>
<td>UP &lt;MSS of parent&gt; Take MSS of parent from PLK $b if PLK $a = &quot;contains&quot;</td>
</tr>
<tr>
<td>Ids32</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Isr31</td>
<td>DN &lt;MSS of parent&gt; Take MSS of parent from PLK $b if PLK = &quot;contains&quot;</td>
<td></td>
</tr>
<tr>
<td>Isr32</td>
<td>UP &lt;MSS of parent&gt; Take MSS of parent from 001 if PLK $a = &quot;part of&quot;</td>
<td></td>
</tr>
</tbody>
</table>

Source Parent Record

```
<controlfield tag="001">9910239404401631</controlfield>
<datafield tag="245" ind1="1" ind2="0">
  <subfield code="a">Twayne's United States authors series.</subfield>
</datafield>
<datafield tag="PLK" ind1="" ind2="">
  <subfield code="a">Part Of.</subfield>
  <subfield code="b">9916538754401631</subfield>
</datafield>
```

And many more PLK...
Child PNX Record

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

- Demo

Setting up Collection Discovery

Support Resources

- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Alma-Primo_Integration](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Alma-Primo_Integration)
- Primo Users Listserv
Q & A

Any Questions?

Session Survey Evaluation

Please use provide feedback on this session:

https://www.surveymonkey.com/r/technsem2017
THANK YOU