Objectives

By the end of this session you will understand:

• The main aspects of Alma-Primo interoperability within the context of an Alma/Primo consortium
  
  • Publishing
  • Delivery
  • Alma as Link Resolver/ERM

• How to setup Alma for Primo / Primo for Alma
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

- Overall view
- Alma consortial topologies
- Basics: setting up the Primo view
Alma and Primo

Alma:
Catalog, ERM, DRM

Primo:
Search Engine
User Interface (Database)

Other SE (Google Scholar)

Primo Central

Alma:
ER M

Alma:
Services

Holdings

Delivery

Service Page

Collaborative Networks

Affects Publishing

Central Catalog, Shared Catalog

Joint acquisitions and negotiations

ILL directly between partners

Direct patron interaction

Affects Services

Cataloging

Acquisitions

Resource Sharing

Fulfillment
### Alma/Primo Topology - Collaborative Networks

<table>
<thead>
<tr>
<th>Alma</th>
<th>Primo</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Multiple Alma institutions – no Network Zone</td>
<td>• Primo institution per Alma institution. Each institution will manage their own data.</td>
</tr>
<tr>
<td>• Have a Fulfilment Network and/or want a Union Catalog and/or ‘search other institution’</td>
<td>• Every institution will have its own view / a central view is also possible.</td>
</tr>
<tr>
<td>• Multiple Alma institutions with Network Zone</td>
<td>• May dedup across-institutions</td>
</tr>
<tr>
<td></td>
<td>• Will likely have shared scopes</td>
</tr>
<tr>
<td></td>
<td>• Primo institution per Alma institution</td>
</tr>
<tr>
<td></td>
<td>• Shared management of data – single feed from Alma</td>
</tr>
<tr>
<td></td>
<td>• Every institution will have its own view / a central view is also possible.</td>
</tr>
<tr>
<td></td>
<td>• Will likely have shared scopes</td>
</tr>
</tbody>
</table>

### Alma-Primo Basics

- [Configuring the Primo Institution – documentation](#)
- [Configuring the Primo institution – example](#)
Alma-Primo: Publishing

- Alma record structure → Primo /with & without NZ
- The publishing process / with & without NZ
- Suppressing records
- Key fields in published Alma record
- Key fields in normalizing to the PNX
- Deduping Alma records in Primo

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

Holdings and Items

IE – Electronic

Portfolios

IE – Digital

Representations

Alma Publishing to Primo: at the IE level

MMS

(MMS ID=1234)

Electronic Holdings

(ID=876)

Print Holdings

(ID=567)

Alma

Electronic Record

ID=876

(MMS=1234)

Print Record

ID=567

(MMS=1234)

Primo

Dedup record

Print+Electronic

(based on MMS ID)
**Alma Data Structure: Shared Acquisitions of E**

- Network Zone
  - MMS (BIB)
  - IE-E
    - AVE INST-A
    - AVE INST-B
    - AVE INST-C

- Institution A – will have no record
- Institution B – will have no record
- Institution C – will have no record

---

**Centralized Publishing**

- Alma Network Zone
  - Shared Catalog
  - Shared e-Inventory

- Alma Institution A
  - Local extensions of bib records
  - Institutional Inventory

- Alma Institution B
  - Local extensions of bib records
  - Institutional Inventory

**Primo Publishing Platform**
**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

Suppress Records from Publishing

- Job: Suppress BIB records from Discovery
Publishing in Primo

- Data source
  - IZ publishing – one per Alma institution
  - Centralized publishing – single data source

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

- Pipe
  - Regular
  - “Update pipe”

- Dedup – important to dedup based on MMS

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: IZ vs Centralized Publishing

<table>
<thead>
<tr>
<th>Field</th>
<th>IZ publishing</th>
<th>Centralized publishing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record ID (in header)</td>
<td>IE of inventory</td>
<td>IE of NZ</td>
</tr>
<tr>
<td>This becomes the basis for the PNX record ID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MMS</td>
<td>Included in 001</td>
<td>Added to MMS field</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Per institution</td>
</tr>
<tr>
<td>Institution</td>
<td>INST</td>
<td>INST $$a$$</td>
</tr>
<tr>
<td>Inventory type</td>
<td>INT</td>
<td>INST $$b$$</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(INST $$c$$ = IE of institution)</td>
</tr>
<tr>
<td>Local field</td>
<td></td>
<td>Institution added to $$A$$</td>
</tr>
</tbody>
</table>

### Key Fields

- **AVA** – physical inventory per location
  - $$a$$ – Institution code
  - $$b$$ – Library code
  - $$c$$ – Location display name
  - $$d$$ – Call number
  - $$e$$ – Availability - available, unavailable, or checkHoldings).
  - $$j$$ – Location code
  - $$k$$ – Call number type
  - $$p$$ – priority
## 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</td>
</tr>
<tr>
<td></td>
<td></td>
<td>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=“database”</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>
</tbody>
</table>

## Sample Records

- [IZ publishing](#)
- [Centralized Publishing](#)
IZ Published Record

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

IZ Published PNX

<control>
<sourcerecordid>2110001860001021</sourcerecordid>
<sourceid>primo_alma</sourceid>
<originalsourceid>01BC_INST</originalsourceid>
<sourceformat>MARC21</sourceformat>
<almaid>01BC_INST:2110001860001021</almaid>
</control>
<display>
<availlibrary>01BC_INST&&GOV&&Stacks[L 2.71:455-4]
available</availlibrary>
<availinstitution>01BC_INST&&GOV&&Stacks</availinstitution>
<availpnx>available</availpnx>
</display>
<search><searchscope>AZ01BC_INST</searchscope></search>
<facets>
<atoz>C</atoz>
</facets>
IZ Publishing PNX

<dedup>
<ct>1</ct>
<ct>3</ct>consumerexpenditurescteristics</ct>
<ct>4</ct>1977</ct>
<ct>5</ct>992234070001021</ct>
<ct>6</ct>consumerexpenditurescteristics</ct>
<ct>6</ct>1977</ct>
<ct>7</ct>consumer expenditure survey series interview survey 1972 73 average annual income and expenditures for commodity and service groups classified by family characteristics</ct>
</dedup>

delivery
<institution>01BC_INST</institution>
<delcategory>Alma-P</delcategory>
</delivery>

Centralized Publishing Published Record

<controlfield tag="001">99164820300001451</controlfield>
<datafield tag="INST" ind1="" ind2=" ">
<subfield code="a">01ALLIANCE_NETWORK</subfield>
<subfield code="b">P</subfield>
<subfield code="c">71167879300001451</subfield>
</datafield>
<datafield tag="INST" ind1="" ind2=" ">
<subfield code="a">01ALLIANCE_EWU</subfield>
<subfield code="b">P</subfield>
<subfield code="c">2198007380001843</subfield>
</datafield>
<datafield tag="AVA" ind1=" " ind2=" ">
<subfield code="0">99115243520101843</subfield>
<subfield code="a">01ALLIANCE_EWU</subfield>
<subfield code="b">JFK</subfield>
<subfield code="c">Upper Level Book Stacks</subfield>
<subfield code="d">E178 A535</subfield>
<subfield code="e">available</subfield>
<subfield code="f">2</subfield>
<subfield code="g">0</subfield>
<subfield code="j">ejs</subfield>
<subfield code="k">0</subfield>
<subfield code="p">1</subfield>
</datafield>
<datafield tag="AVA" ind1=" " ind2=" ">
<subfield code="0">99115243520101843</subfield>
<subfield code="a">01ALLIANCE_EWU</subfield>
<subfield code="b">MARS</subfield>
<subfield code="c">local</subfield>
</datafield>

Centralized Publishing - PNX

<control>
<sourcerecordid>71167879300001451</sourcerecordid>
<sourceid>CP</sourceid>
<recordid>CP71167879300001451</recordid>
<originalsourceid>01ALLIANCE_NZ</originalsourceid>
<sourceformat>MARC21</sourceformat>
<sourcesystem>Alma</sourcesystem>
<almaid>01ALLIANCE_NETWORK:71167879300001451</almaid>
<almaid>01ALLIANCE_EWU:2198007380001843</almaid>
</control>
<display>
<availlibrary>$$IEWU$$LEWU_JFK$$1Upper Level Book Stacks$$2(E178 .A535)
$$Savailable$$X01ALLIANCE_EWU$$YJFK$$Zejs$$ availlibrary>
<availlibrary>$$IPSU$$LPSU_MILLAR$$1Offsite$$2(Z1236 .A51357)
$$Savailable$$X01ALLIANCE_PSU$$YMILLAR$$ZPANXRQ$$ availlibrary>
<availlibrary>$$IWWU$$Savailable<availlibrary>
<availlibrary>$$IPSU$$Savailable<availlibrary>
<availlibrary>$$IWWU$$Savailable<availlibrary>
</display>

Centralized Publishing - PNX

<search>
<searchscope>AZNZ</searchscope>
<searchscope>AZEWU</searchscope>
<searchscope>AZPDS</searchscope>
<searchscope>AZUID</searchscope>
<searchscope>AZUW</searchscope>
<delivery>
<institution>NZ</institution>
<institution>EWU</institution>
<institution>PSU</institution>
<institution>UID</institution>
<institution>UW</institution>
<delcategory>Alma-P$$INZ</delcategory>
<delcategory>Alma-P$$IEWU</delcategory>
<delcategory>Alma-P$$PSU</delcategory>
<delcategory>Alma-P$$UID</delcategory>
<delcategory>Alma-P$$UW</delcategory>
</delivery>
Alma – Primo: Delivery

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

Delivery in Consortia – Points to consider

- Cross-institution dedup can result in records with mixed institution inventory.
  - Do we take this inventory into account?

- Institutions can search each other’s records.
  - What kind of delivery can be offered if the institution itself has no inventory at all?

- What is the “active” institution?
  - For P (Get It) → directed to the owner of the inventory. Initial request always to institution of the view
  - For E (View It) → directed to the institution of the user
  - For D (View It) → directed to the owner of the inventory.
    - May change with the new “Shared-D” option
<table>
<thead>
<tr>
<th>Flag</th>
<th>Configured in</th>
<th>Description</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always Prefer Online Resources in Multi-Institution Records</td>
<td>General Configuration</td>
<td>If institution has P inventory – take electronic inventory of other institutions in account?</td>
<td>If set to “Y” you probably also need to set up restricted delivery scopes</td>
</tr>
<tr>
<td>Shared User Database &amp; Resource sharing</td>
<td>General Configuration</td>
<td>This means that users can place requests in other institutions. It also means that if the institution only has electronic inventory, the P inventory of other institutions will be taken into account</td>
<td></td>
</tr>
<tr>
<td>Sort by locations by user institution / Include only locations of the view</td>
<td>View Wizard</td>
<td>Display/do not display locations from other institutions</td>
<td></td>
</tr>
</tbody>
</table>
Alma Collaborative Networks: Resource Sharing

- Description: Users always request from their home libraries

- Setup in Primo:
  - Shared scopes
  - Inventory from other institutions is suppressed

- Flags:
  - Always Prefer Online Resources in Multi-Institution Records → N
  - Shared User Database & Resource sharing → N
  - Locations → Include only locations of the view

Alma Collaborative Networks: Fulfilment Network

- Description: Users request from owning institution directly

- Setup in Primo:
  - Shared scopes
  - Inventory from other institutions is not suppressed

- Flags:
  - Always Prefer Online Resources in Multi-Institution Records → Y
  - Shared User Database & Resource sharing → Y
  - Locations → Sort by user institution
Alma Delivery

Alma Services

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

Demo
Demo Classic UI

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

Identifying Patrons

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

Primo <> Alma <> PDS / Primo Authentication

- 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 status
  - Every delivery category will be assigned a Get It 1
    - In consortium member inventory is taken into account

- **Primo Central records:** Remote Search Resource
**Physical Availability and RTA**

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

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

- Calculated availability status – relative to institution of the view
  
  - If at least one AVA = “available” \(\rightarrow\) available_in_maininstitution
  
  - If at least one AVA = check_holdings’ \(\rightarrow\) check_holdings_in_maininstitution
  
  - If unavailable
    
    - “unavailable_in_maininstitution_more” \(\rightarrow\) member institutions have holdings
    
    - “unavailable_in_maininstitution_nomore” \(\rightarrow\) members do not have holdings
  
  - If does not exist \(\rightarrow\) does_not_exist_in_maininstitution

- Labels are defined in “Calculated Availability Status”

- Display of “Best Location”
  
  - Determined based on location that matches status and then priority in AVA \$Sp

**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” \(\rightarrow\) Scope Values definition
  
  - Add to the normalization rules \(\rightarrow\) in Delivery section
  
  - Defined allowed users \(\rightarrow\) “Restricted Delivery Scopes”

- Can be used in the following scenarios:
  
  - Shared scopes include “E” inventory from member institutions
    
    - View It will not offer services except for GES.
    
    - Based on availability status “Restricted” GetIt1 can be changed to “Get It”
      
      - Example (BIBSYS)
  
  - For D inventory with access restrictions. From main institution or member institutions.
### Fulfilment Networks – What is Required?

- **In Alma:**
  - Define fulfilment network and policies

- **In Primo:**
  - Dedup across institutions
  - Create shared scopes
  - Users can access Get It of member institutions

### Fulfilment Network: My Account

- Display all My Account info for all institutions
**Fulfilment Network: My Account - Configuration**

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

- Customer Parameter: uresolver_remote_register
  - Fulfilment Configuration → General → Other settings. Values:
    - Auto – always created. Default
    - None – user not created at all
    - Manual – user must indicate he wants to create a user in member institution

  - Must be defined in the member institution – not the home institution

**Manually Linked Patrons**

![Image of manually linked patrons](image)
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
  • Fulfilment Configuration → Discovery Interface Display Logic → Other Settings
    → display_additional_holding_fields_in_getit set to ‘true’

• Location Priorities
  • Fulfilment Configuration → Discovery Interface Display Logic → Locations Ordering Profiles

• Item sort routines
  • Resource Management Configuration → General → Physical Items Sort Routines

Alma as Link Resolver / ERM

• Publish holdings to Primo Central
• The Services Page
**Publish Holdings to Primo Central**

- Publish Alma data to Primo Central

<table>
<thead>
<tr>
<th>Action</th>
<th>Name</th>
<th>Description</th>
<th>Last Run</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>Publish bib records to Primo</td>
<td></td>
<td>Actions</td>
</tr>
<tr>
<td>✔️</td>
<td>Synchronize local holdings with OCLC</td>
<td></td>
<td>Actions</td>
</tr>
<tr>
<td>✔️</td>
<td>Synchronize bibliographic records with OCLC</td>
<td></td>
<td>Actions</td>
</tr>
<tr>
<td>✔️</td>
<td>Publish electronic records to Primo Central</td>
<td></td>
<td>Actions</td>
</tr>
<tr>
<td>✔️</td>
<td>Publish electronic records to Google Scholar</td>
<td></td>
<td>Actions</td>
</tr>
</tbody>
</table>

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

```
Client name: PRIMO
Client ID: EXLEDEV1_NIST_PPRRO
Registered application: Primo
Environment type: Production
FT1 host name and port: demo-alma.exlibrisgroup.com:1701
EDX Invenio host name and port: demo-alma.exlibrisgroup.com:1801
```

---

**The Alma Services Page**

![Alma Services Diagram](image-url)

Source

- Request for services

User searches and Source and requests services

Primo

- Request for services

Primo displays Services Page in user's browser

Alma

- Response
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:

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 : Setup in Alma**

- **Alma MARC Template supports 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 $$I with the institution to prevent cross-institution display

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

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

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 lds30-39/lsr30-30 fields

- Works same as other lateral links (author, title):
  - Content displayed – is searched in parallel index. For example:
    - display/lds30 <record ID>
    - Searches for <record ID> in the search/lsr30 index
Using lds30-9/lsr30-9: Setup

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

- **Setup:**
  - Search Engine Configuration – Results Threshold – Number of active local fields in search section
    - Increase and deploy Search Engine Configuration

What can be done?

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Parent</th>
<th>Child</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source</td>
<td>001 = MMS of parent PLK/s $aPart of $b&lt;child MSS&gt;</td>
<td>001=MMS of child PLK $acontains $b&lt;parent MSS&gt;</td>
</tr>
<tr>
<td>lds31</td>
<td>DN&lt;MSS of parent&gt; Take MSS of parent from 001 if PLK $a=&quot;part of&quot;</td>
<td></td>
</tr>
<tr>
<td>lds32</td>
<td></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>lsr31</td>
<td></td>
<td>DN &lt;MSS of parent&gt; Take MSS of parent from PLK $b if PLK=&quot;contains&quot;</td>
</tr>
<tr>
<td>lsr32</td>
<td></td>
<td>UP &lt;MSS of parent&gt; Take MSS of parent from 001 if PLK $a=&quot;part of&quot;</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...

Source Child Record

<controlfield tag="001">9916507164401631</controlfield>
<datafield tag="245" ind1="1" ind2="0">
  <subfield code="a">Henry Miller </subfield>
</datafield>
<datafield tag="PLK" ind1="" ind2="">
  <subfield code="a">Contains.</subfield>
  <subfield code="b">9910239404401631</subfield>
</datafield>
PNX Parent Record
<title>Twayne's United States authors series.SERIES.</title>
<lds31>DN9910239404401631</lds31>
<lsr32>UP9910239404401631</lsr32>

Child PNX Record
<title>Henry Miller / by Kingsley Widmer.</title>
<lds29>9916507164401631</lds29>
<lds32>UP9910239404401631</lds32>
<lsr31>DN9910239404401631</lsr31>
### Rule Group: display_Mz29

<table>
<thead>
<tr>
<th>Source</th>
<th>Type</th>
<th>Field</th>
<th>Ind1</th>
<th>Ind2</th>
<th>Subfield</th>
<th>Conditions logic</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARC</td>
<td>001</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>True</td>
</tr>
</tbody>
</table>

**Conditions**

**Condition 1: Logic**

<table>
<thead>
<tr>
<th>Field</th>
<th>Ind1</th>
<th>Ind2</th>
<th>Subfield</th>
<th>Success If</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Match Current</td>
</tr>
</tbody>
</table>

**General Parameter**

- Take characters from the end: 4
- Check string equals string: 1621

**Transformations**

- **Copy As Is**
- **Behavior**
- **Action**: OFF

### Rule Group: display_Mz31

<table>
<thead>
<tr>
<th>Source</th>
<th>Type</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PNK</td>
<td>display_Mz29</td>
<td></td>
</tr>
</tbody>
</table>

**Conditions**

**Condition 1: Logic**

<table>
<thead>
<tr>
<th>Field</th>
<th>Ind1</th>
<th>Ind2</th>
<th>Subfield</th>
<th>Success If</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Match Any</td>
</tr>
</tbody>
</table>

**General Parameter**

- **Routine**
- **Upper Case**: ON
- **Check string equals string**: DART OF

**Transformations**

- **Add to beginning of string**: OFF
- **Behavior**
- **Action**: ADD
## Collection Discovery

- **Demo**

<table>
<thead>
<tr>
<th>Rule group</th>
<th>search_br22</th>
<th>search_br22</th>
<th>search_br22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source</td>
<td>PNX</td>
<td>display/br22</td>
<td>Enabled</td>
</tr>
<tr>
<td>Condition logic</td>
<td>True</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Condition 1 - Logic</td>
<td>True</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Condition 1 - Source</td>
<td>MARC</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Transformations

<table>
<thead>
<tr>
<th>Transformation</th>
<th>Parameter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address beginning of string</td>
<td>UP</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Action</th>
<th>ADD</th>
<th></th>
</tr>
</thead>
</table>

Go to top of page

Vote new source mapping

Go Back  Save

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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/techsem2017

THANK YOU