Publishing Records in Primo

Jean Cabaup | Training Consultant
Mike Pruzan | Senior Knowledge Management Specialist

Agenda

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

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

Publishing Overview – Record in Front End

Diverse methodologies in the study of music teaching and learning
Linda K. Thompson, Mark Robin Campbell (2018)
& Education, Music Library, Music Library, 8811. 811 39.18)
Get It Details Virtual Review

Table of Contents
This is in Amazon
This is in WorkCerti
Why do we transform records?
- Start with different data repositories and different formats
- End result – all records in same format
- Allows Primo to search all records at once
- Consistent display
- Scopes, facets, browse

What do records get transformed into?
- Primo Normalized XML (PNX)
Agenda

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

Stages of Publishing – Library Catalog
Stages of Publishing – Library Catalog

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

Stages of Publishing – Extract

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

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

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

- **FTP/SFTP**
  - Primo picks up extract from ILS
  - ILS transfers extract to other server where Primo picks it up

- **OAI PMH**
  - Repository configured to respond to Primo’s request for data

### Stages of Publishing – Normalize

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

**MARC XML** → **PNX**
**Stages of Publishing – Normalize**

- Library Catalog
- Extract
- Harvest
- Normalize
- Persistence
- DEDUP
- FRBR
- Index
- DidUMean
- Hotswap

**Dublin Core**

**PNX**

**Stages of Publishing – Enrich**

- Library Catalog
- Extract
- Harvest
- Normalize
- Persistence
- DEDUP
- FRBR
- Index
- DidUMean
- Hotswap

**Enrichment**

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

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

Stages of Publishing – DEDUP

DEDUP
- De-duplication process
- Recognizes multiple copies of the same item
- Displays them as one item with multiple copies/locations
Stages of Publishing – FRBR

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

Stages of Publishing – Indexing and Hotswapping

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

Did You Mean
- Usually run once a week
### Stages of Publishing – Summary

- **Library Catalog**
- **Data Extracted**
- **Data Harvested**
- **Data Normalized**
- **Data Enriched**
- **Data written to Primo Database (Persistence)**
- **Data DEDUPed and FRBRed**
- **Index Created**
- **Hotswap Run**
- **DidUMean Generated**

---

**Diverse methodologies in the study of music teaching and learning**

*Edited by Linda K. Thompson and Mark Robin Campbell* (2008)

**Available at Music Library Music Stacks (MT1.D56 2008)**

---

### Agenda

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

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

Adding a new data source
Editing a data source
Deleting a data source
- Can only delete a data source if it’s not being used

Exercise #2a

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

See handout for step-by-step instructions
Scope Values Configuration – DEMO

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

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

Adding / Editing scope values
- Types of scopes (institution, library, collection)
Pipes Configuration – DEMO

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

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

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

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

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

**Editing a Pipe**
- Go to Pipes List (can add one here, too)

**Deleting a Pipe**
- In Primo Back Office, can only delete pipes that haven’t been used

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

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

Pipes Configuration – DEMO

Running a Pipe
- Executing a pipe
- Terminating a pipe

History
- Status

Logs
- Log, Harvest Log, Dedup/FRBR logs

Errors
- Show why records weren’t loaded
Exercise #2b

Create and run a pipe to load data into Primo

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

*See handout for step-by-step instructions*