Alma-Primo Integration

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1

Introduction

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 using Primo 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** on page **43**.

    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** on page **15**.
  - 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** on page **49**.

    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** on page **151**.
    - 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** on page **62**.
- 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** on page **97**.

VIDEO:

See *End-to-End Discovery for Alma and Primo* for a detailed training Webex session on Alma-Primo integration. (47 mins). Note that you must be logged on to the Ex Libris Learning Center to access this session.

2

Basic Primo Configuration for Integration with Alma

This section includes:

Configuring the Primo Institution

To work with Primo in conjunction with Alma, you must configure the Primo institution in the Primo BO as described below.

To configure the Primo institution:

1. In the Primo Back Office, click **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 click **Create** in the **Create a New Institution** section. Otherwise, continue with the next step.
3. In the **Select Institution for Editing** section, click **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 used in Alma.
   - **SFX institute** – Leave blank.
   - **Source ILS Institution Codes** – Enter the institution code used in Alma.

- **Alma Campus Code** – If you are defining Primo institutions at the campus level, enter theAlma inventory network group, which is defined in Alma. Otherwise, leave this field blank.

For information regarding the other fields, refer to the *Primo Back Office Guide*.

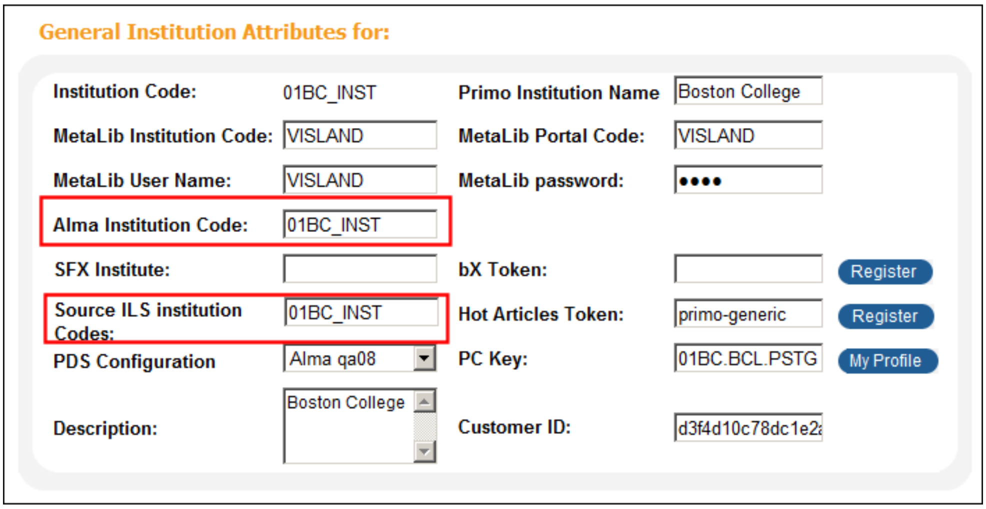


Figure 1: General Institution Attributes (Institution Wizard)

5 In the **Delivery Base URLs** section, enter the following fields:

- **Alma** – Enter the base URL of Alma's link resolver. Use the following format:

  https://<*Alma_base_url:port*>/view/uresolver/<*Alma_institution_code*>/openurl

  If you are defining Primo institution's at the campus level, include the campus code:

  https://<*Alma_base_url:port*>/view/uresolver/<*Alma_institution_code*>/openurl-<*Alma_campus_code*>

- **Alma Services Page URL** – Enter the base URL for the Services Page view. For more information, see **Base_URL for the Services Page** on page 98. Currently, this field is used for the bX Hot Articles service. For more information on enabling bX Hot Articles, see the *Primo Back Office Guide*.

- **RTA** – Enter the URL that provides Primo with real-time availability statuses. Use the following format:

  https://<*RTA_base_url:port*>/view/publish_avail

- **API** – Enter the URL of the Alma API that performs the following:

- Returns user information that is required for the My Library Card functionality.
- Utilizes the Alma RSI API to return full text availability indication for records returned by remote searches using MetaLib.

Use the following format:

```
https://<API_base_url:port>
```

The above URL must be defined previously in the ILS API Configuration mapping table. For more information, see the *Primo Interoperability Guide*.

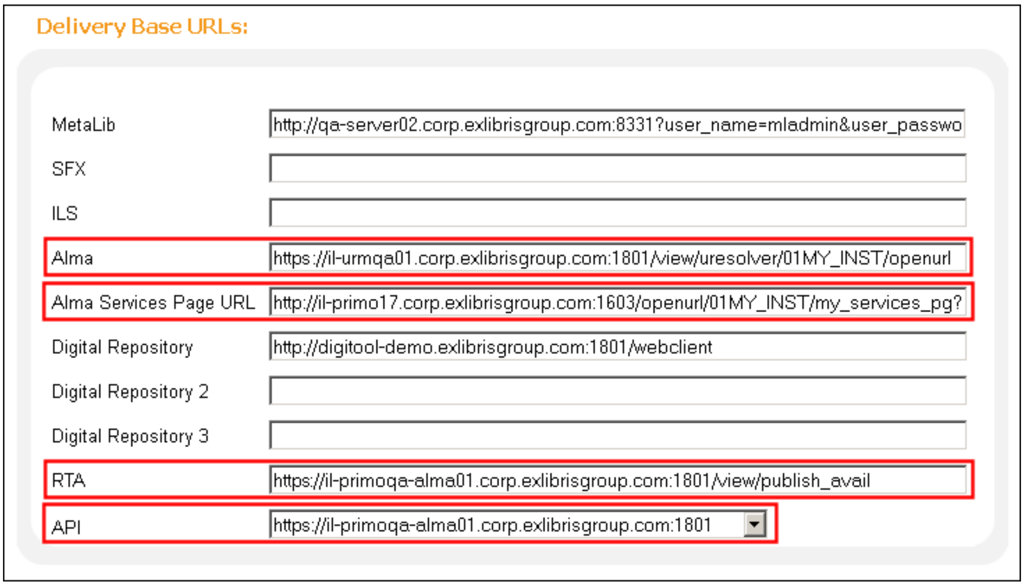


Figure 2: Delivery Base URLs (Institution Wizard)

IMPORTANT:
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 Obtain the names of the libraries used in Alma. For more information, see **Viewing and Exporting the Alma Libraries** on page 13.

7 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 on loading libraries, see the *Primo Back Office Guide*.

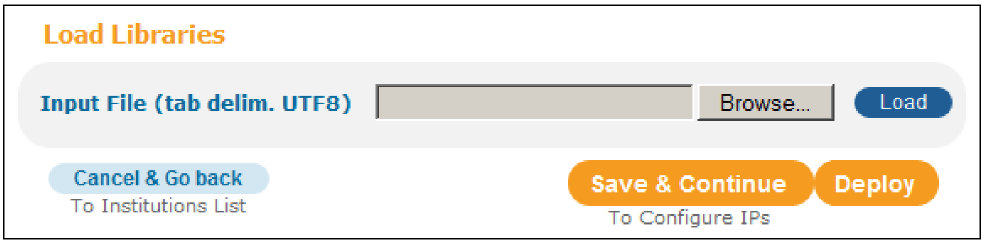


Figure 3: Load Libraries Section (Institution Wizard)

- **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.

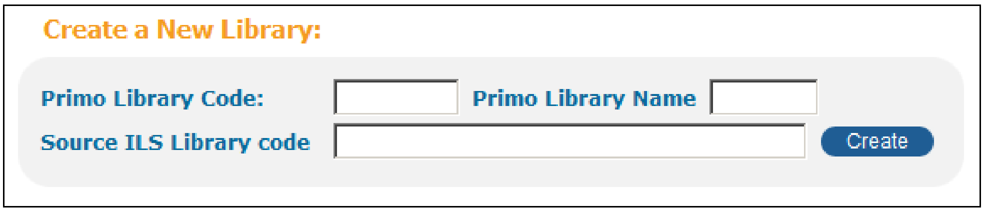


Figure 4: Create a New Library Section (Institution Wizard)

8 Click **Save & Continue**.

The Edit IPs page opens.

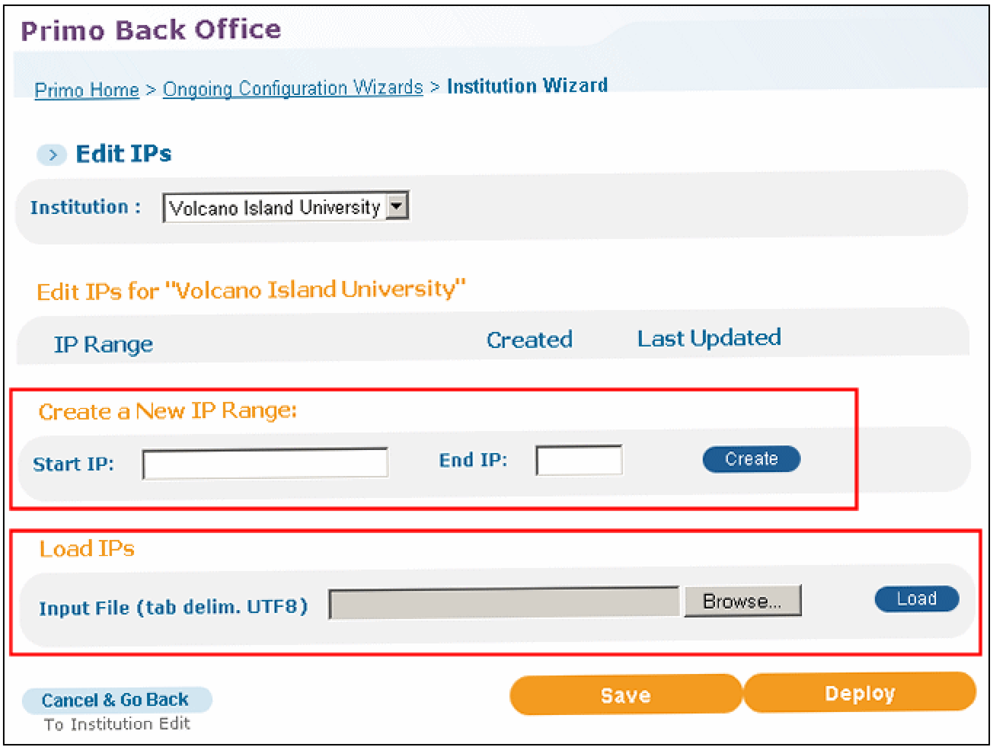


Figure 5: Edit IPs Page

9 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 the *Primo Back Office Guide*.

10 Deploy your changes to the Front End.

VIDEO:

See *Alma and Primo* for a detailed Webex training session on configuring Primo with Alma. Note that you must be logged on to the Ex Libris Learning Center to access this session.

Viewing and Exporting the Alma Libraries

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 General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Manage Your Institution's Libraries** under **Libraries**. The Organization Unit Details page opens
3. Click the **Libraries** tab to view the available libraries.

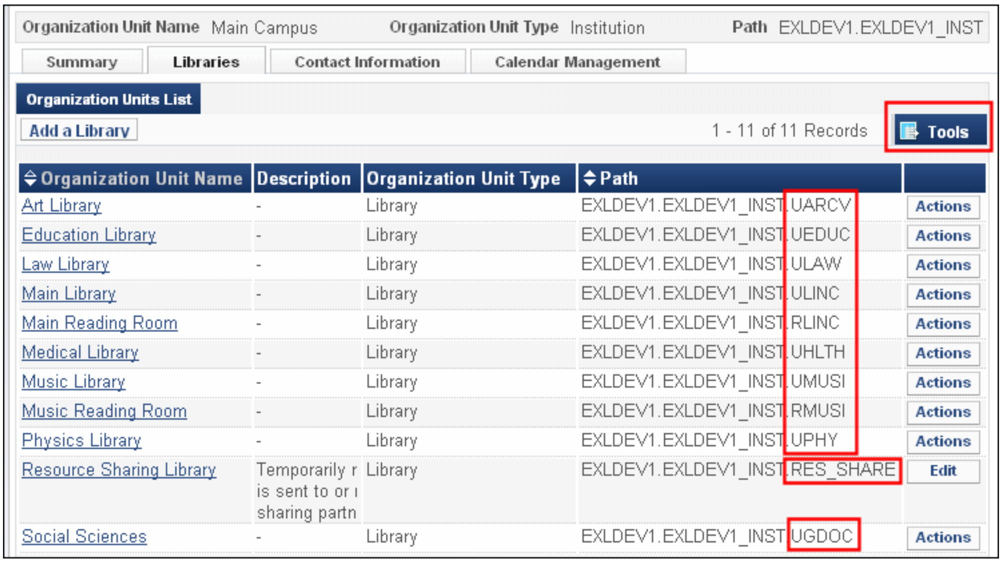


Figure 6: Libraries Tab

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, `ULINC` is the Alma library code for the following path:

```
EXLDEV1.EXLDEV1_INST.ULINC
```

4. Select **Tools** > **Excel** to export the list of Alma libraries to an Excel file.
5. Change the exported file to the format described in the Loading Libraries section in the *Primo Back Office Guide*.

3

Publishing Alma Data to Primo

This section includes:

Exporting Alma Records to Primo

The Alma publishing process is run after the bibliographic, holdings, circulation data, and optional course reserves data has been populated in Alma. Alma exports the full set of records the first time and then exports the changed records daily. After Alma exports the records, Primo harvests and normalizes the exported records to be searched and viewed by end users via Primo's Front End.

Publishing to Primo

The publishing profile allows you to configure the settings used to publish the records to Primo.

For consortial environments, the NZ institutions can publish shared resources for the member institutions. For more information, see **Publishing from the Network Zone Institution** on page **21**.

To publish Alma records to Primo:

1 Configure an S/FTP connection to be used by Alma and Primo (see **Configuring S/FTP Definitions** in the *Alma Administration Guide*).

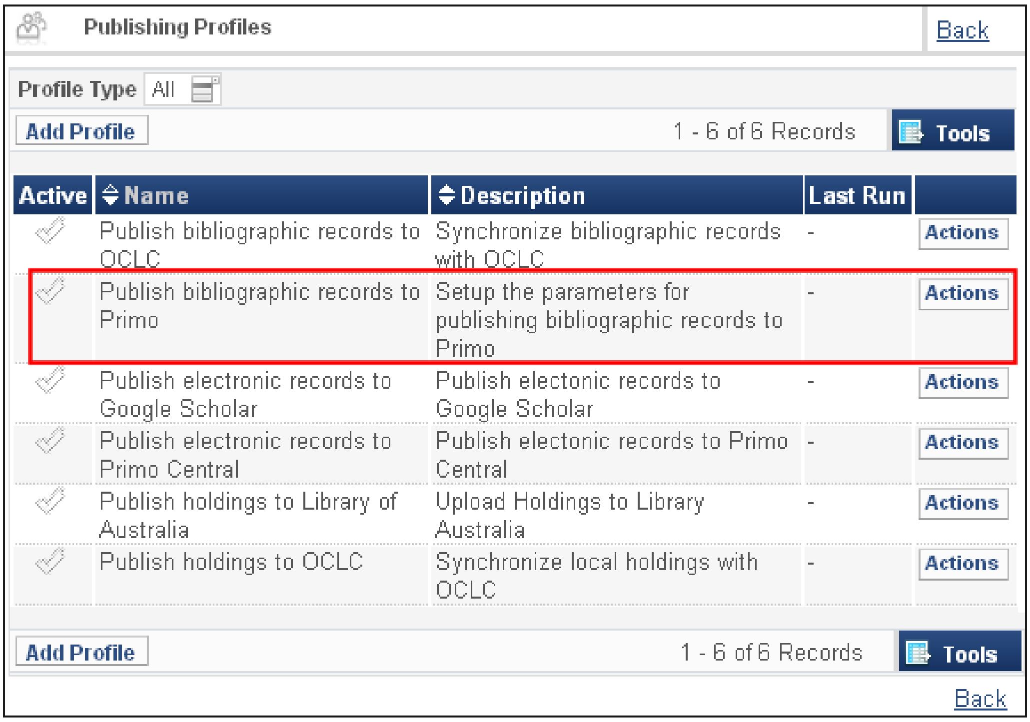
For example:

Figure 7: Update S/FTP Connection Page

NOTES:

- Before saving a new S/FTP connection, you can click the **Test FTP** button to test your connection.
- If you enter a subdirectory, it must not begin with a slash (/) and must be located under the home directory of the specified user. It cannot be located elsewhere on the file system.
- Make sure that port 22 on the Primo server is open to the Alma server.

2 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Publishing Profiles** under **Record Export**. The Publishing Profile page opens.



Active	Name	Description	Last Run	
	Publish bibliographic records to OCLC	Synchronize bibliographic records with OCLC	-	Actions
	Publish bibliographic records to Primo	Setup the parameters for publishing bibliographic records to Primo	-	Actions
	Publish electronic records to Google Scholar	Publish electonic records to Google Scholar	-	Actions
	Publish electronic records to Primo Central	Publish electonic records to Primo Central	-	Actions
	Publish holdings to Library of Australia	Upload Holdings to Library Australia	-	Actions
	Publish holdings to OCLC	Synchronize local holdings with OCLC	-	Actions

Figure 8: Publishing Profiles Page

3 In the row that contains the **Publish bibliographic records to Primo** profile, select **Actions > Edit**.

The Publishing Profile Details page opens.

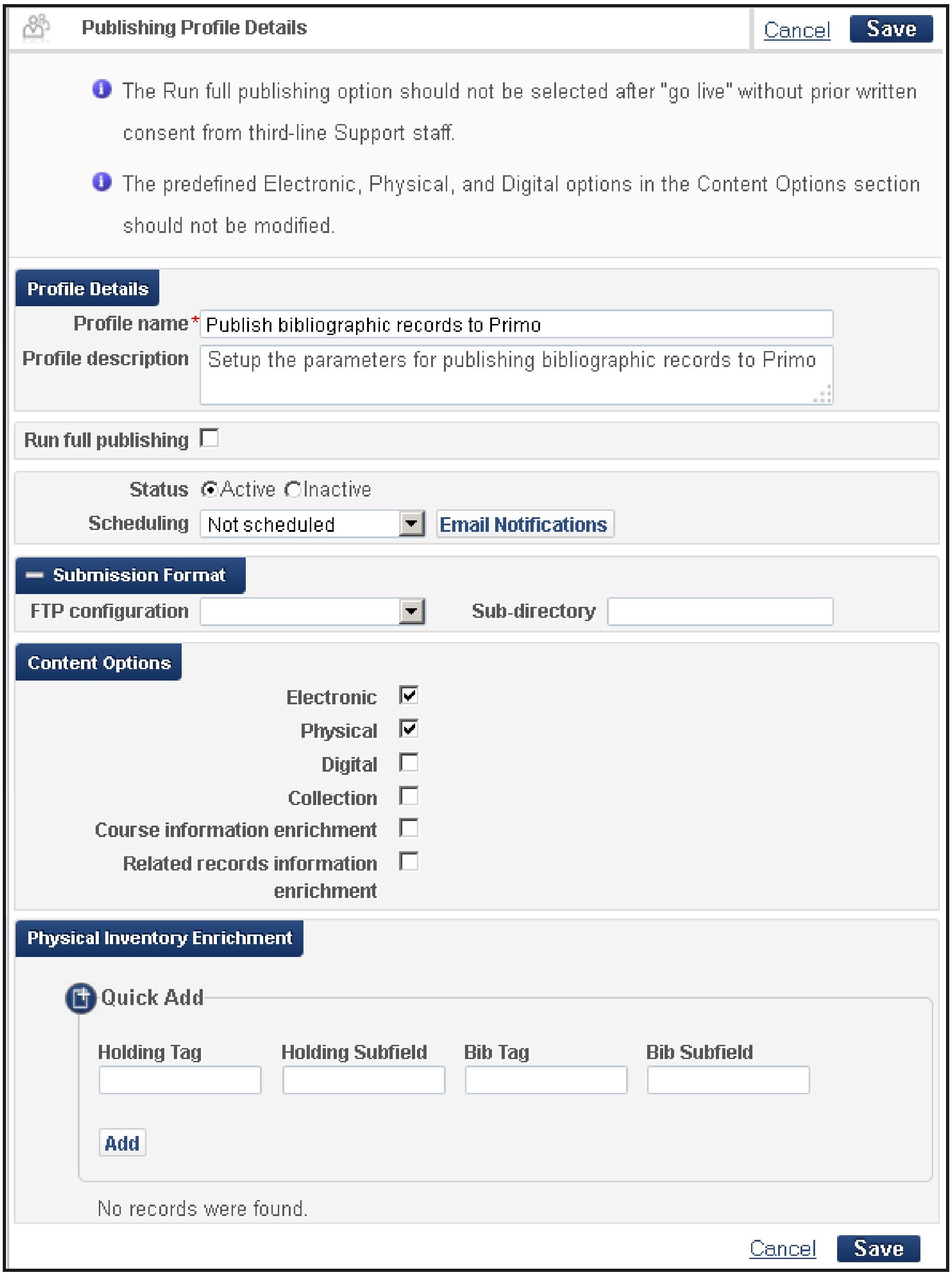


Figure 9: Publishing Profile Details Page

4 Configure the following fields per section:

Table 1. Publishing Profile Details

Field	Description
Profile Details section:	
Profile Name and Description	Update these fields as required.
Run full publishing	If this option is selected, the system publishes all records, replacing previously published data. If this option is not selected, the system publishes records that have changed since the last time they were published. This includes bibliographic records that were added, updated, deleted, and linked to inventory records that changed.
Scheduling	From the drop-down list, select one of the scheduling options that are predefined by an Ex Libris administrator. If you select **Not scheduled**, the export job will run only when you manually run it (select **Actions > Run** for the profile from the Publishing Profiles page).
Email Notifications	Opens the Email Notifications for Scheduled Jobs page, which allows you to specify which users and email addresses will receive email notifications when the publishing profile has completed. You will have the option to choose whether to send the notifications for successful jobs and/or jobs that contain errors.
Status	Select **Active**.
Submission Format section:	
FTP configuration	By default, the publishing process places the exported files in a directory that Primo uses to harvests the files. This field specifies a predefined profile that contains the FTP information. If the transfer fails, the system includes a link to the published files in the publishing report. **NOTE:** The directory must be configured in advance because Alma cannot create it. From the drop-down list, select the name of the S/FTP connection that you previously defined.

Table 1. Publishing Profile Details

Field	Description
Sub-directory	The subdirectory in which the exported files are placed. For example, if you specified **Alma** in the Sub-directory field during S/FTP connection configuration and you enter **Primo** in this field, the data is exported to the `Alma/Primo` directory.
Content Options section:	
Electronic, Physical, Digital, and Collection	Select the check box next to the type of records that you want to publish.
Course information enrichment	Indicates whether course reserve information is included with the bibliographic records. Note that course reserves are not published as independent records. Instead, the system adds this information to the CNO field in the associated bibliographic record.
Related records information enrichment	Indicates whether related record information is included with the bibliographic records.
Physical Inventory Enrichment section:	
Quick Add area	The following fields in the Quick Add area allow you to map holdings tags/subfields from the holdings record to tags/ subfields in the published bibliographic record: **Holding Tag**, **Holding Subfield**, **Bib Tag**, and **Bib Subfield**. After you have entered the above mapping data, click **Add** to add the new mapping to the list.

5 Click **Save**. The modified publishing profile appears activated on the Publishing Profiles page. Data that meets the defined criteria is exported to the specified FTP location when the profile is run (either manually or according to the selected schedule).

For information on monitoring a publishing export job, see **Monitoring Jobs** in the *Alma Administration Guide*.

NOTE:
Because job monitoring can report a successful completion even when the FTP has failed, it is important to check the job report for errors.

Publishing from the Network Zone Institution

The **Publish bibliographic records from Network Zone to Primo** publishing job enables the NZ institution in a consortial environment to export the following types of bibliographic records for the member institutions:

- All records that are managed by the network only.
- All records to which one or more members are linked. The network records are enriched with local data from members (such as course information, local fields, availability, electronic availability, and so forth).
- Each member's local bibliographic records. The ability to run the job from the NZ institution helps prevent duplication of records that may occur in Primo if each institution in the network ran publishing separately.

To publish bibliographic records from the NZ institution:

1. On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Publishing Profiles** under **Record Export**. The Publishing Profile page opens.

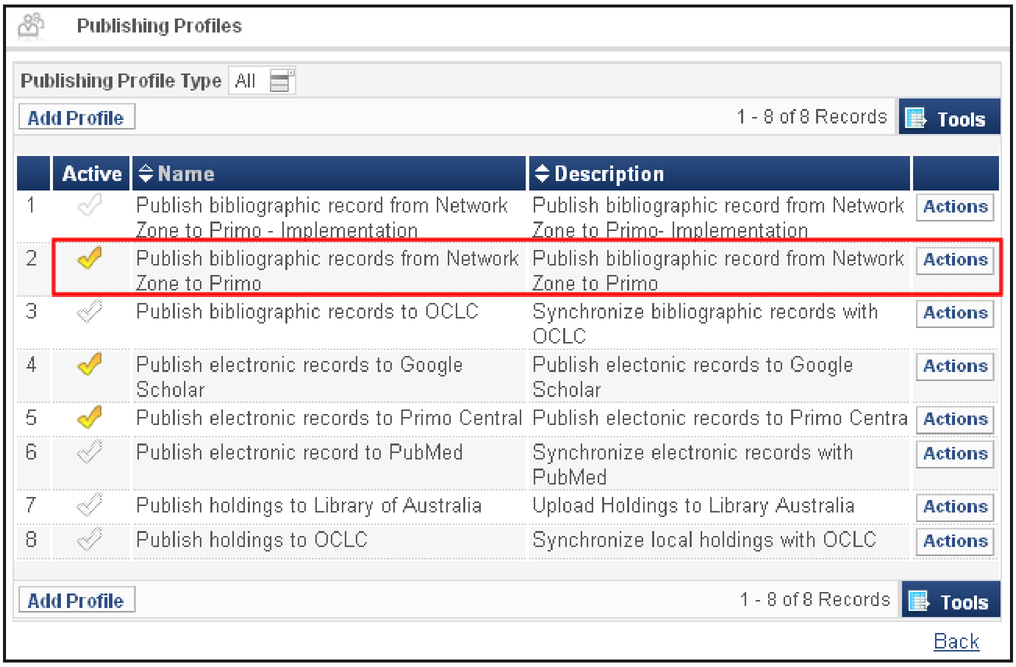


Figure 10: Publishing Profiles Page

NOTE:
The implementation version of this job allows you to run a separate job for a test environment.

2 In the row that contains the **Publish bibliographic records from Network Zone to Primo** profile, select **Actions > Edit**.

The Publishing Profile Details page opens.

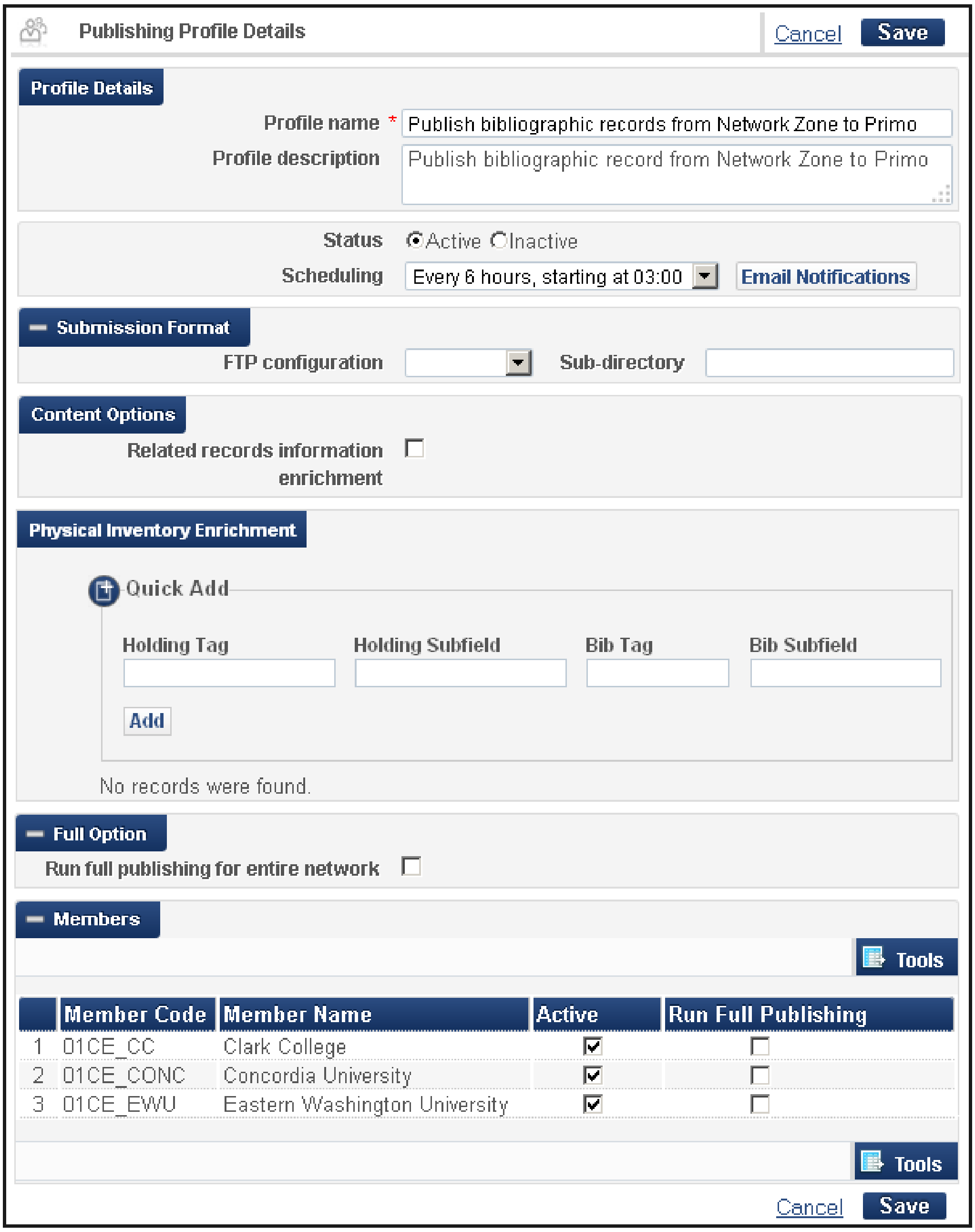


Figure 11: Publishing Profile Details Page

3 Configure the following fields per section:

Table 2. Publishing Profile Details

Field	Description
Profile Details section:	
Profile Name and Description	Update these fields as required.
Scheduling	From the drop-down list, select one of the scheduling options that are predefined by an Ex Libris administrator. If you select **Not scheduled**, the export job will run only when you manually run it (select **Actions > Run** for the profile from the Publishing Profiles page).
Email Notifications	Opens the Email Notifications for Scheduled Jobs page, which allows you to specify which users and email addresses will receive email notifications when the publishing profile has completed. You will have the option to choose whether to send the notifications for successful jobs and/or jobs that contain errors.
Status	Select **Active**.
Submission Format section:	
FTP configuration	By default, the publishing process places the exported files in a directory that Primo uses to harvests the files. This field specifies a predefined profile that contains the FTP information. If the transfer fails, the system includes a link to the published files in the publishing report. **NOTE:** The directory must be configured in advance because Alma cannot create it. From the drop-down list, select the name of the S/FTP connection that you previously defined.
Sub-directory	The subdirectory in which the exported files are placed. For example, if you specified **Alma** in the Sub-directory field during S/FTP connection configuration and you enter **Primo** in this field, the data is exported to the `Alma/Primo` directory.
Content Options section:	
Related records information enrichment	Indicates whether related record information is included with the bibliographic records.

Table 2. Publishing Profile Details

Field	Description
Physical Inventory Enrichment section:	
Quick Add area	The following fields in the Quick Add area allow you to map holdings tags/subfields from the holdings record to tags/ subfields in the published bibliographic record: **Holding Tag**, **Holding Subfield**, **Bib Tag**, and **Bib Subfield**. After you have entered the above mapping data, click **Add** to add the new mapping to the list.
Full Option section:	
Run full publishing	If this option is selected, the system publishes all records, replacing previously published data. If this option is not selected, the system publishes records that have changed since the last time they were published. This includes bibliographic records that were added, updated, deleted, and linked to inventory records that changed.
Members section:	
Active	Indicates which members are actively receiving incremental updates.
Run Full Publishing	Indicates whether full publishing should run for the specified member at the local level. To use this option, the **Run full publishing for entire network** check box must not be selected in the **Profile Details** section. **NOTE:** After the job executes, the system clears the **Run Full Publishing** column so that shared records and incremental updates for all members are included the next time the job runs as scheduled

4 Click **Save**.

The modified publishing profile appears activated on the Publishing Profiles page. Data that meets the defined criteria is exported to the specified FTP location when the profile is run (either manually or according to the selected schedule).

NOTE:

Alma tests the FTP connection before running the profile. If the FTP connection fails, the profile is not run, and there is no resulting loss of data. If the FTP connection fails while the export job is running, the data that was in the process of being exported is kept and included in a subsequent successful export job report.

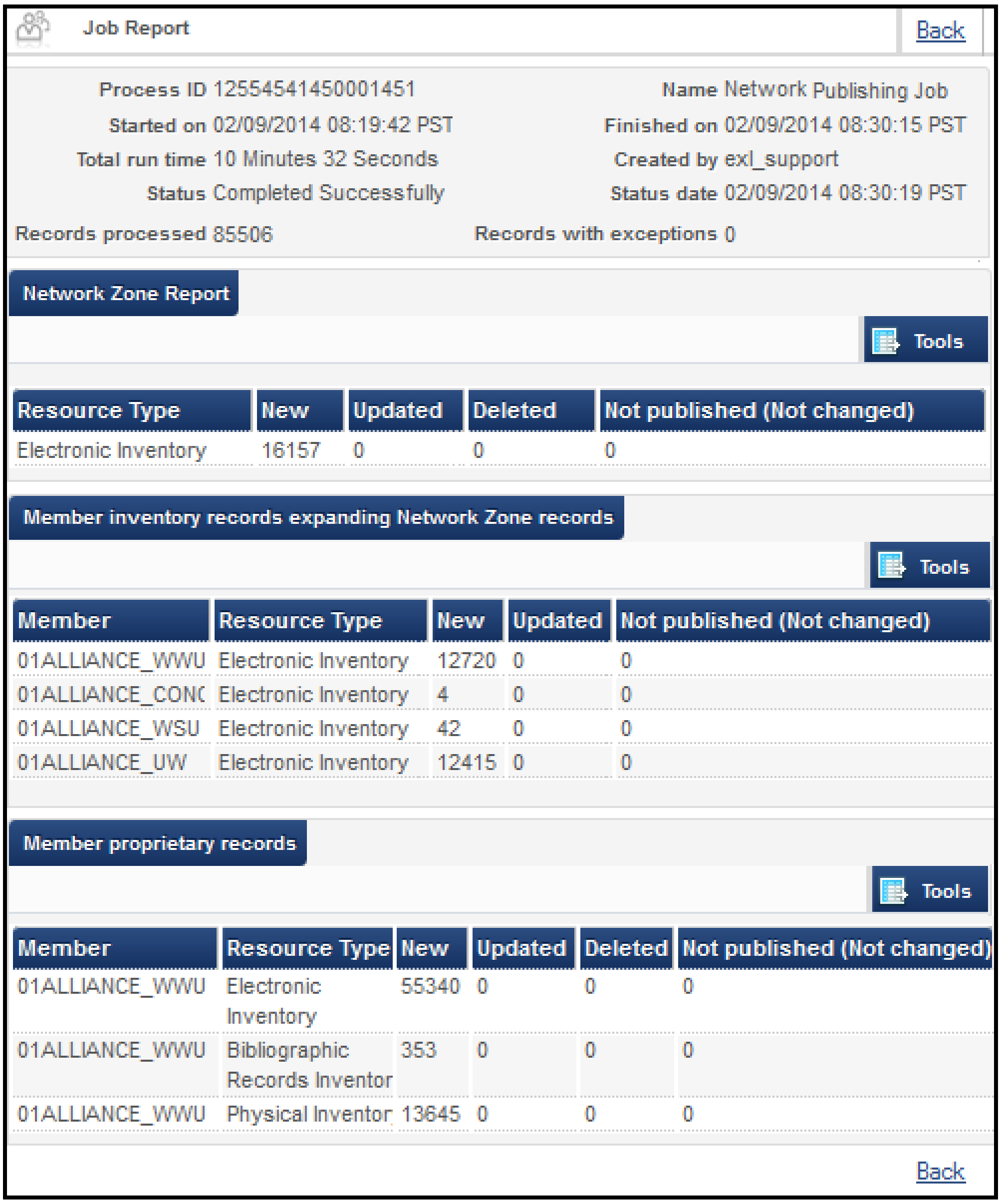
For information on monitoring a publishing export job, see **Monitoring Jobs** in the *Alma Administration Guide*.

Report on the Network Publishing Job

The report that results from running the publishing job includes three tables that contain the following counts:

- For the NZ, the number of New, Updated, Deleted, and Not Published (not changed) records for each resource type. (Electronic Inventory and Bibliographic Records Inventory are currently the types supported).
- For each institution, the number of records (filtered by type and status) that are linked to the NZ and used to enrich the NZ's bibliographic records.
- The number of each member's proprietary records (not linked to the NZ), per resource type, that are New, Updated, Deleted, and Not Published (not changed).

The report resembles the figure below (**Figure 12**), though it will typically contain higher numbers in the Updated, Deleted, and Not Published columns.



Job Report — Back

Process ID 12554541450001451 — Name Network Publishing Job
Started on 02/09/2014 08:19:42 PST — Finished on 02/09/2014 08:30:15 PST
Total run time 10 Minutes 32 Seconds — Created by exl_support
Status Completed Successfully — Status date 02/09/2014 08:30:19 PST
Records processed 85506 — Records with exceptions 0

Network Zone Report

Tools

Resource Type	New	Updated	Deleted	Not published (Not changed)
Electronic Inventory	16157	0	0	0

Member inventory records expanding Network Zone records

Tools

Member	Resource Type	New	Updated	Not published (Not changed)
01ALLIANCE_WWU	Electronic Inventory	12720	0	0
01ALLIANCE_CON(	Electronic Inventory	4	0	0
01ALLIANCE_WSU	Electronic Inventory	42	0	0
01ALLIANCE_UW	Electronic Inventory	12415	0	0

Member proprietary records

Tools

Member	Resource Type	New	Updated	Deleted	Not published (Not changed)
01ALLIANCE_WWU	Electronic Inventory	55340	0	0	0
01ALLIANCE_WWU	Bibliographic Records Inventor	353	0	0	0
01ALLIANCE_WWU	Physical Inventor	13645	0	0	0

Back

Figure 12: Network Publishing Job Report

To access this report:

1. On the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), click the **Completed** tab.
2. Find the publishing job, Publish bibliographic records from Network Zone to Primo (also called Network Publishing Job), in the list of jobs. If necessary, use the search (Find) and filter (by job type) tools to narrow your search.
3. When you find the completed job, select **Actions > Report** in its row.

NOTE:
If you do not see the job in the Completed tab list, check the Running jobs tab to determine whether the job is still running. Wait for it to finish before performing these steps.

The Output of the Publishing Process

The output files of the publishing job are placed in the following directory by default:

/exlibris/urm/u1_1/Alma_root/*<customer code>*/*<institution code>*/output/storage_root/publishing/publishingProfile_*<n>*

The system creates separate subdirectories for each metadata format. Currently, the system creates a `marc` and `dc` directory for MARC and DC data, respectively.

The publishing process output directory contains the archived and compressed (*tar.gz) files with the following naming conventions:

- `IEP*.tar.gz` – Contains bibliographic records with the print inventory.
- `IEE*.tar.gz` – Contains records with electronic inventory.
- `IED*.tar.gz` – Contains records with digital inventory.
- `IE_MMS*.tar.gz` – Contains records with no inventory attached.

Each `tar.gz` file contains 100 Alma records.

NOTE:
Course reserves data is not published as a separate record type. It is embedded in the published P (physical), E (electronic), and D (digital) records.

The Format of Published Data

Alma publishes data in XML format. The system modifies published MARC XML records to include the following data:

- **Alma Intellectual Entity ID** – Stored in the header of the published record, and used as the base for the record ID in Primo:

```
<header status="new">
  <identifier>urm_publish:21239404420001021</identifier>
</header>
```

- **Field 001** – Contains the MMS ID.
- **Field INT** - Indicates the entity type: **P** (Print), **D** (Digital), **E** (Electronic), and **P** (MMS with no inventory). Note that the entity type is stored in the $$a subfield.

- **AVA** – This field is created for print materials only. It contains location and availability information in the following subfields:
  - **$$a** – Institution code
  - **$$b** – Library code
  - **$$c** – Location display name
  - **$$d** – Call number
  - **$$e** – Availability (such as **available**, **unavailable**, or **check_holdings**).
  - **$$j** – Location code
  - **$$k** – Call number type
- **AVE** – This field is created for available for information (Available Electronic). It contains available for information in the following subfields:
  - **$$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

NOTE:
If you have defined a separate Primo institution per Alma campus, this field is the basis for defining the Primo institution in the PNX records. Otherwise, you can use this information to create search scopes and search campus-specific e-resources.

- **CNO** – This field contains course reserve list information in the following subfields:
  - **$$b** – Start date
  - **$$c** – End date
  - **$$e** – Department name
  - **$$f** – Department code
  - **$$g** – Course instructors
  - **$$j** – Course name
  - **$$k** – Course code and section
  - **$$l** – Academic department
  - **$$o** – Searchable IDs
- **INST** – Contains the institution code (needed for the records of type E, for which AVA is not created). Note that the institution code is stored in the $$a subfield. If the Available Electronic functionality is used, the institution may be indicated in the AVE field only.

- **OWN** – This field contains ownership information (Ownership) in the following subfields and is not included in the **Alma MARC - Template** template:
  - **$$i** – contains a single e-resource ownership associated with the bibliographic record (the institution ID)
  - **$$l** – contains a single e-resource ownership associated with the bibliographic record (the library)

NOTE:
Enrichment of the published data by the non-preferred terms from authority records is not yet available.

Suppressing Alma Records from Primo

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

- Suppress all records at a physical location – Select the **Suppress from Externalization** check box for a location. For more information, see **Editing a Physical Location** in the *Alma Fulfillment Guide*.
- 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** in the *Alma Resource Management Guide*.

After a location or an individual record 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** on page **29**.

Republishing Sets of Bibliographic Records

Staff users can create their own 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. Staff users can schedule this publishing process independently from the regular publishing process. The submission format information is taken from the publishing profile.

For consortial environments that are using central publishing, the NZ institutions can republish sets of records. For more information, see **Republishing Sets of Bibliographic Records from the NZ** on page **31**.

To republish a set of records in non-consortial environments:

1. Create a set of bibliographic, physical, digital, or electronic titles. Sets are defined on the Manage Sets page (see **Adding and Modifying Sets** in the *Alma Resource Management Guide*).
2. Click **Run a Job** under **Administration > Manage Jobs**. The Create Job – Select Job to Run page opens.

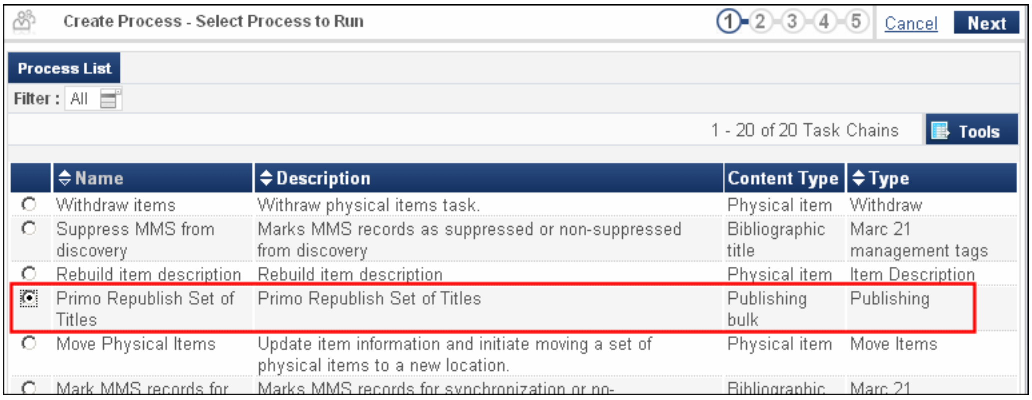


Figure 13: Selecting the Primo Republish Set of Titles Process

3. Scroll to select the row that contains the **Primo Republish Set of Titles** process, and click **Next**. The Create Process - Select Set page opens.
4. Scroll to select the set that you created in Step **1**, and click **Next**. The Create Process - Enter Task Parameters page opens.
5. Click **Next**. The Create Process - Process Details and Schedule page opens.
6. Enter a name (required) and select a schedule for the process.

NOTE:
You monitor this process using the name you enter (see **Monitoring Jobs** in the *Alma Administration Guide*).

7. Click **Next**. The Create Process - Review and Confirm page opens.
8. Click **Save** to save the process definition, which will run according to the selected schedule. You can monitor the progress of the process on the Monitor Jobs page (see **Monitoring Jobs** in the *Alma Administration Guide*).

Republishing Sets of Bibliographic Records from the NZ

For consortial environments that are using central publishing, the NZ institution can republish sets of records independently from the central publishing process. The submission format information is taken from the publishing profile.

In addition, individual members that belong to the consortium can mark records for republishing. For more information, see **Republishing Sets of Bibliographic Records from a Member Institution** on page 32.

To republish a set of records from the NZ:

1. Create a set of bibliographic, physical, digital, or electronic titles. Sets are defined on the Manage Sets page (see **Adding and Modifying Sets** in the *Alma Resource Management Guide*).
2. Click **Run a Job** under **Administration > Manage Jobs**. The Create Job – Select Job to Run page opens.

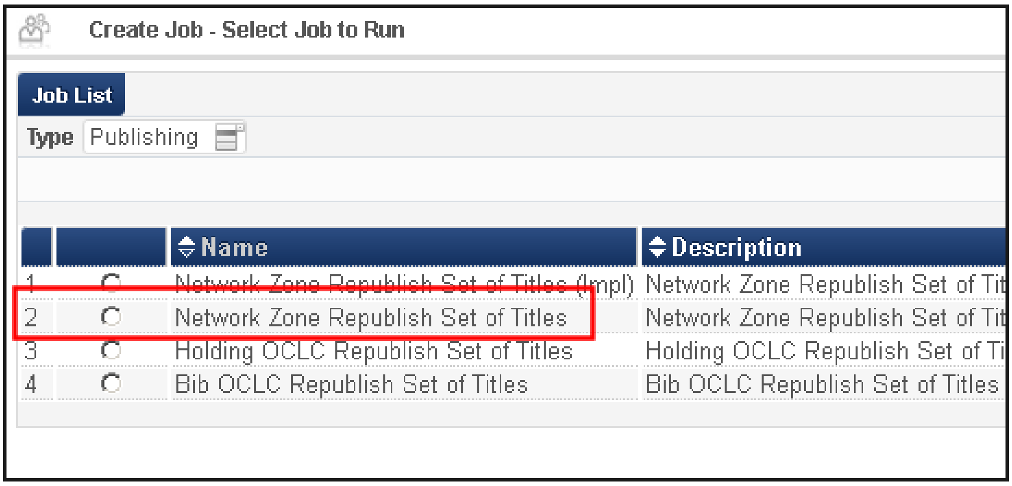


Figure 14: Selecting the NZ Republish Set of Titles Process

NOTE:
The implementation version of this job allows you to run a separate job for a test environment.

3. Scroll to select the row that contains the **Network Zone Republish Set of Titles** process, and click **Next**. The Create Process - Select Set page opens.
4. Scroll to select the set that you created in Step 1, and click **Next**. The Create Process - Enter Task Parameters page opens.
5. Click **Next**. The Create Process - Process Details and Schedule page opens.
6. Enter a name (required) and select a schedule for the process.

NOTE:
You monitor this process using the name you enter (see **Monitoring Jobs** in the *Alma Administration Guide*).

7 Click **Next**. The Create Process - Review and Confirm page opens.

8 Click **Save** to save the process definition, which will run according to the selected schedule. You can monitor the progress of the process on the Monitor Jobs page (see **Monitoring Jobs** in the *Alma Administration Guide*).

Republishing Sets of Bibliographic Records from a Member Institution

For consortial environments that are using central publishing, member institutions can mark a set of records to be republished to Primo by the **Publish bibliographic record from Network Zone to Primo** job, which runs on the NZ.

If enabled, member institutions can publish directly to Primo. For more information, see **Displaying Hidden Publishing Profiles and Jobs for Member Institutions** on page 33.

To republish a set of records from a member institution:

1 Create a set of bibliographic, physical, digital, or electronic titles. Sets are defined on the Manage Sets page (see **Adding and Modifying Sets** in the *Alma Resource Management Guide*).

2 Click **Run a Job** under **Administration > Manage Jobs**. The Create Job – Select Job to Run page opens.

Figure 15: Selecting the Mark Records Process

NOTE:
The implementation version of this job allows you to run a separate job for a test environment.

3 Scroll to select the row that contains the **Mark records to be republished by NZ job** process, and click **Next**. The Create Process - Select Set page opens.

4 Scroll to select the set that you created in Step 1, and click **Next**. The Create Process - Enter Task Parameters page opens.

5 Click **Next**. The Create Process - Process Details and Schedule page opens.

6 Enter a name (required) and select a schedule for the process.

NOTE:
You monitor this process using the name you enter (see **Monitoring Jobs** in the *Alma Administration Guide*).

7 Click **Next**. The Create Process - Review and Confirm page opens.

8 Click **Save** to save the process definition, which will run according to the selected schedule. You can monitor the progress of the process on the Monitor Jobs page (see **Monitoring Jobs** in the *Alma Administration Guide*).

Displaying Hidden Publishing Profiles and Jobs for Member Institutions

For consortial environments that are using central publishing, member institutions can publish records and republish sets directly to Primo using the following standard publishing profiles and jobs:

- **Publish bibliographic records to Primo** publishing profile– For more information, see **Publishing to Primo** on page 16.
- **Primo Republish Set of Titles** publishing job – For more information, see **Republishing Sets of Bibliographic Records** on page 29.

To display the hidden publishing profiles and jobs:

1 On the CustomerParameters mapping table (**Administration > General Configuration > Configuration Menu > General Configuration > Other Settings**) locate the following parameter:

hide_primo_publishing_options_for_network_member

2 Click **Customize** to allow the field to be modified.

3 Set the **Parameter Value** field to **false**.

4 Click **Save** to display the hidden publishing processes and jobs in the member institution.

Excluding Process Types from Publishing

Loans that are claimed as returned or lost are identified separately from other loans in order for them to be processed or displayed differently. These types of loans can be excluded so that they are not displayed to end users during discovery. In addition, this prevents lost loans from being requested.

NOTES:

- Excluding process types hides only items and does not affect other metadata level types.
- 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 **Modifying Display Labels** on page **114**.

To exclude a process type from publishing:

1 From the Alma main menu, select **Resource Management > Resource Configuration > Configuration Menu**.

2 In the **Record Export** section, click **Exclude Process Types from Publishing**.

The ExcludeProcessTypePublishing mapping table opens:

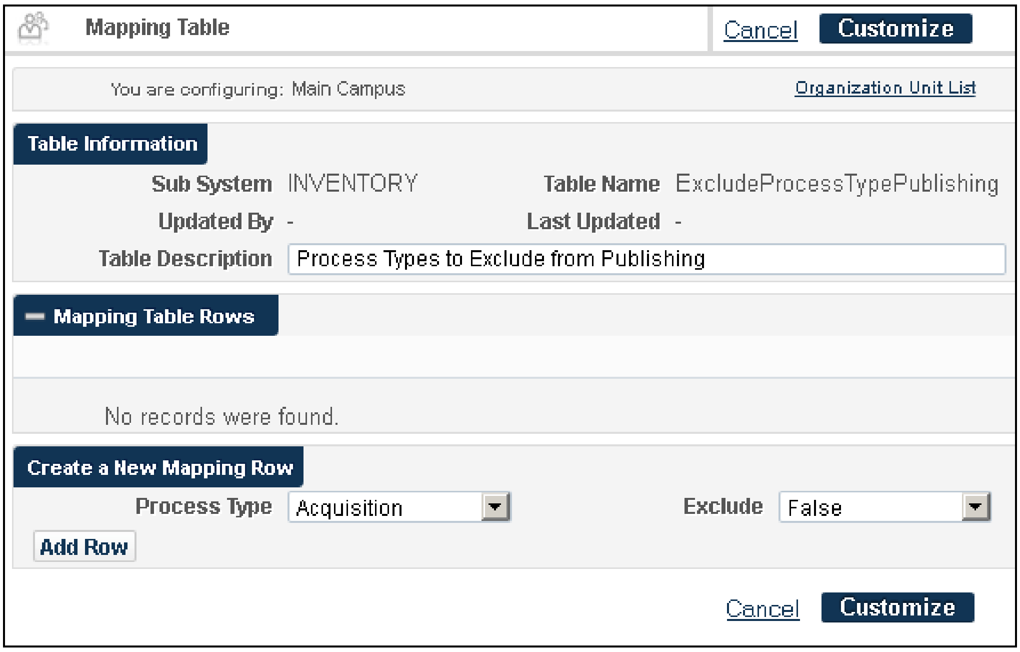


Figure 16: ExcludeProcessTypePublishing Mapping Table

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 Click **Add Row**.

The new row is added to the Mapping Table Row section:

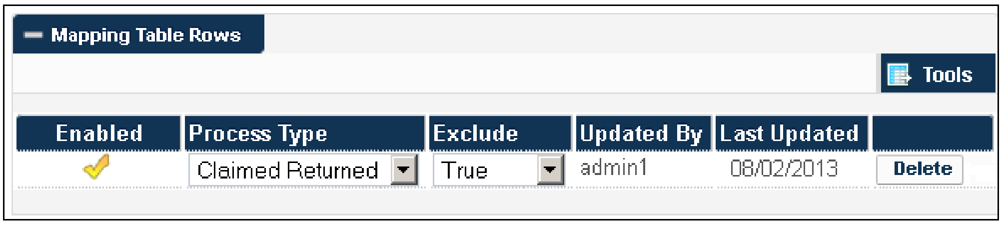


Figure 17: Excluded Process Types Rows

6 Click **Customize** to save your changes to the mapping table.

Displaying Alternative Call Number Information in Primo

Alma allows you to display the alternative call number information on the Get It tab in Primo.

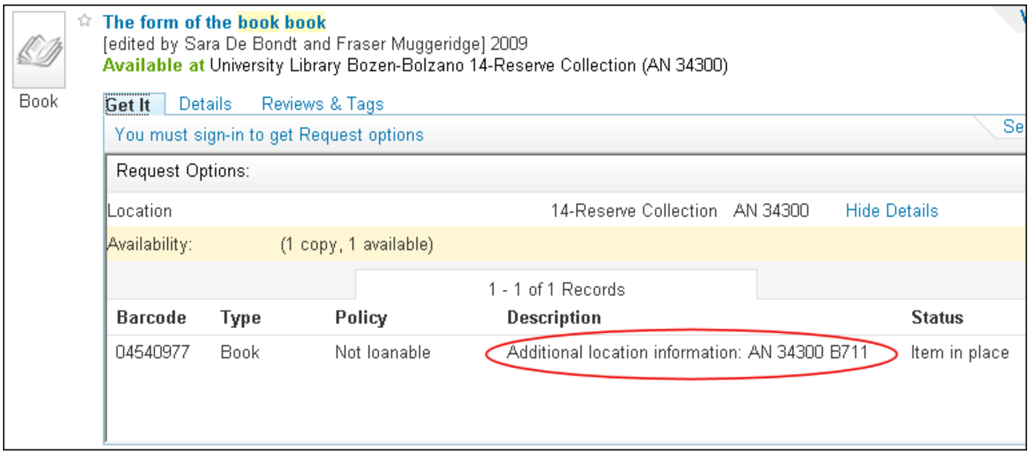


Figure 18: Display of Alternative Call Number Information in Primo

In addition, you may customize the text/label that precedes the alternative call number information on the Get It tab in the Description column. For more information on customizing labels, see **Modifying Display Labels** on page **114**.

To display the alternative call number information in Primo:

1. From the Alma main menu > Administration > General Configuration, click **Configuration Menu**.
2. From the **General Configuration** section, click **Other Settings**.

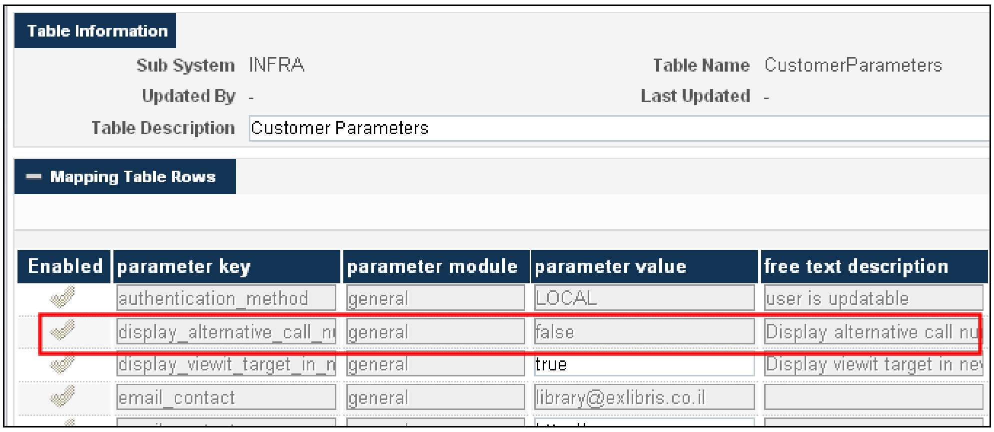


Figure 19: Customer Parameters - Display Alternative Call Number

3. For the **display_alternative_call_number_in_getit** parameter, click **Customize** to allow the fields to be modified.
4. Set the **parameter value** field to **True**.
5. Click **Save** to save your changes to the mapping table.

Available For and Library-Level Ownership of E-Resources Published to Primo

For e-resources in an Alma multicampus environment, you can add library-level ownership and Available for information to the bibliographic records published to Primo. This can be implemented by defining a separate Primo institution per 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 Available for information:
  - **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

  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:

```
<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 per Alma campus, you can use the AVE information to create search scopes and search campus-specific e-resources.

NOTE:

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

The Available for settings/groups are configured in Inventory Network Groups (**Resource Management > Resource Configuration > Configuration Menu**). For more information, see **Configuring Inventory Available For Management Groups for Multicampus Environments** in the *Alma Resource Management Guide*.

Harvesting and Publishing Alma Records in Primo

Before you can harvest the exported Alma data in Primo, you must configure the institution, data source, normalization rules, and publishing pipe in Primo. For more information on configuring the institution, see **Configuring the Primo Institution** on page 9. The sections below describe how to define the data source, configure the normalization rules, and publish the records in Primo.

Define Alma as a Data Source

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

To define the data source in Primo:

1. On the Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard page, click **Data Sources Configuration**.

   The Data Sources page opens.

2. Click **Edit** next to your Alma institution in the list.

   The Data Sources Attributes page opens.

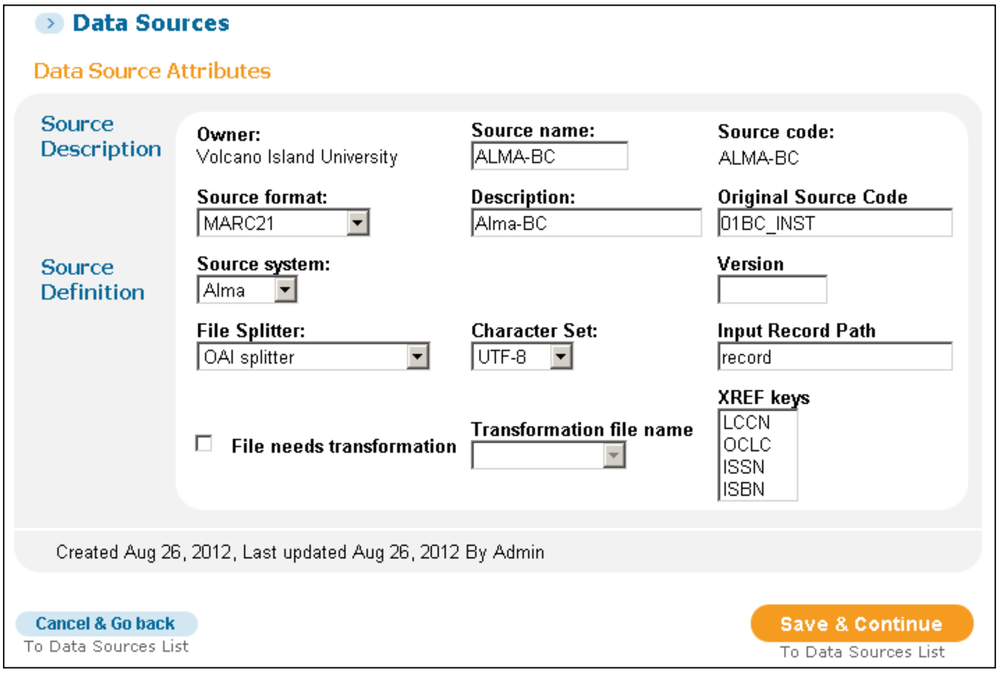


Figure 20: Data Sources Attributes Page

3 Configure the data source. The following fields are essential for Alma data sources:

- **File Splitter** – Select **OAI splitter**.
- **Source system** – Select **Alma**.
- **Character Set** – Select **UTF-8**.
- **Source format** – Select **MARC21**.
- **Original Source Code** – Enter the Alma institution code.
- **Input record path** – Enter **record**.

4 Click **Save & Continue**.

Create a Set of Normalization Rules

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

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

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

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

- **Delivery/delcategory** – Alma delivery is based on the new 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 in the *Primo Technical Guide* for more information.

Deploy, Load, Index (not Alma-specific)

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

These steps are not specific to Alma and do not require special attention for Alma. Refer to the *Primo Back Office Guide* for more details.

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

1. In the Primo Back Office, run **Deploy all**.
2. Create a publishing pipe for the harvesting and loading of Alma data.

NOTE:
Use the S/FTP connection that was defined in Alma. For more information, see **Publishing to Primo** on page **16**.

3 Execute the publishing pipe.

4 Run indexing.

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

6 Schedule ongoing indexing.

4

Configuring the Primo Front End for an Alma Data Source

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.

This section includes:

Creating a Primo View

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** on page **9**). For details on how to create a Primo view, refer to the section in the *Primo Back Office Guide*.

NOTE:
Currently, Primo does not support a hybrid view of Alma and Voyager.

Removing the Locations Tab

Because Alma includes the location information in the Get It tab instead of the Locations tab, the Locations tab is not used and should be hidden in the view. This is accomplished by modifying the CSS styles that are applied to the Primo view.

To remove the Locations tab:

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
```

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 the *Primo Technical Guide*.

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

Configuring Primo Delivery of Alma Data and Services

IMPORTANT:
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, refer to the *Primo Back Office Guide*.

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).

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** on page 107.

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.

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** on page **46**.

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, refer to the *Primo Technical Guide*.

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 3. GetIT! Tab 1 Text Configuration Mapping Table

Delivery Category Code	Availability Status Code	Tab 1 Label Code (Change)	Tab 1 Label Code (To)
Online Resource	may_be_restricted	tab1_onl_mayrestrict	alma_tab1_mayrestrict
Online Resource	restricted	tab1_onl_restrict	alma_tab1_restrict
Online Resource	not_restricted	tab1_onl_norestrict	alma_tab1_norestrict

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

Table 4. GetIT! Tab 2 Text Configuration Mapping Table

Delivery Category Code	Availability Status Code	Tab 2 Label Code (Change)	Tab 2 Label Code (To)
Online Resource	may_be_restricted	tab2_onl_mayrestrict	alma_tab2_mayrestrict
Online Resource	restricted	tab2_onl_restrict	alma_tab2_restrict
Online Resource	not_restricted	tab2_onl_norestrict	alma_tab2_norestrict

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

Table 5. GetIT! Link 2 Configuration Mapping Table

Delivery Category Code	Availability Status Code	Link field in PNX (Change)	Link field in PNX (To)
Online Resource	may_be_restricted	openurl	Almagetit
Online Resource	restricted	openurl	Almagetit
Online Resource	not_restricted	openurl	Almagetit

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-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 6. Local Mapping Table Configurations

Mapping Table	Use	Delivery Category / Availability Status	Definition
GetIt Link 1 Configuration	Defines the main delivery option (Get It 1)	Alma-P / all statuses	The system uses the **Almagetit** template to request Get It services from Alma.
		Alma-E and Alma-D / All statuses	The system uses the **Almaviewit** template to request View It services from Alma.
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.	All	Every delivery category/status has a separate code. See the mapping rows in this mapping table for details.
GetIt! Link 2 Configuration	Defines the secondary delivery option (Get It 2).	Alma-P / All statuses	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.
		Alma-E and Alma-D / All statuses	The system uses the **Almagetit** template to request additional services from Alma.
GetIt Tab 2 Text Configuration	Defines the codes for the label of the GetIt 2 tab. The text is defined in the code tables.	All	Every delivery category/status has a separate code. See the mapping table for details.

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 7. Local Code Table Configurations

Code Table	Use	Delivery Category	Definition
GetIt! Tab 1	Defines the label for the Get It 1 tab.	Alma-P	Get It
		Alma-E and Alma-D	View It
GetIt! Tab 2	Defines the label for the Get It 2 tab.	Alma-P	No tab defined.
		Alma-E and Alma-D	Get It

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** on page **151**. 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 8. Remote Mapping Table Configurations

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

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 9. Remote Code Table Configurations

Code Table	Use	Delivery Category	Definition
GetIt! Tab 1	Defines the label for the Get It 1 tab.	Remote Search Resource:Alma / fulltext	View It
		Remote Search Resource:Alma / no_fulltext	Get It
GetIt! Tab 2	Defines the label for the Get It 2 tab.	Remote Search Resource:Alma / fulltext	Get It
		Remote Search Resource:Alma / no_fulltext	No tab defined.

Configuring Real-Time Availability

Primo uses real-time availability (RTA) 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 RTA, refer to the *Primo Interoperability Guide*. This section explains how to configure RTA in Primo for Alma.

To configure RTA for Alma:

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

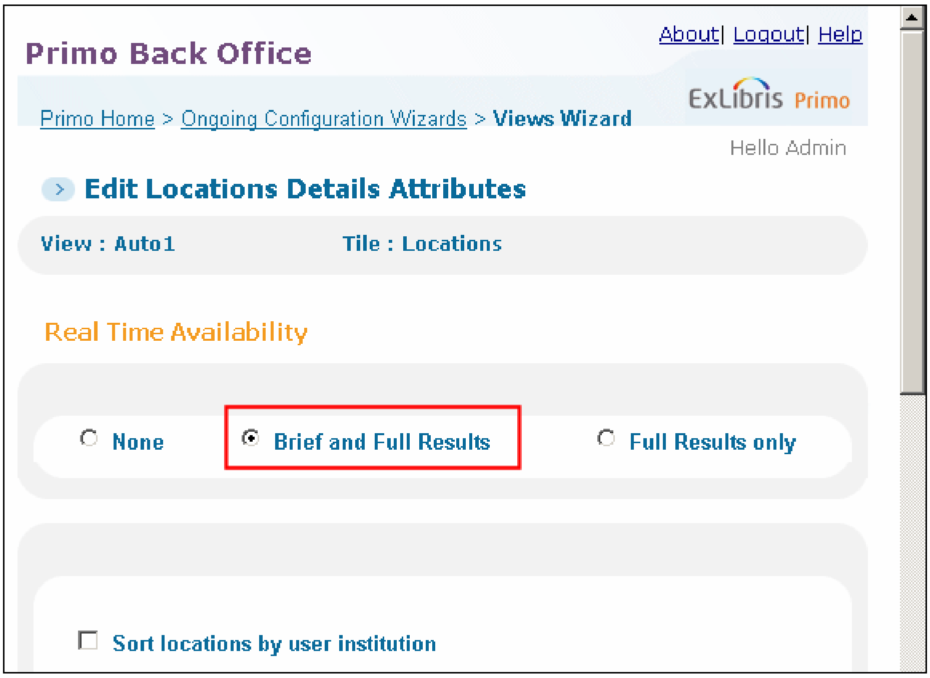


Figure 21: Locations Tile in the Views Wizard - Enable RTA

2 Make sure that the **RTA URL** field is defined correctly on the Primo Home > Ongoing Configuration Wizards > Institution Wizard page.

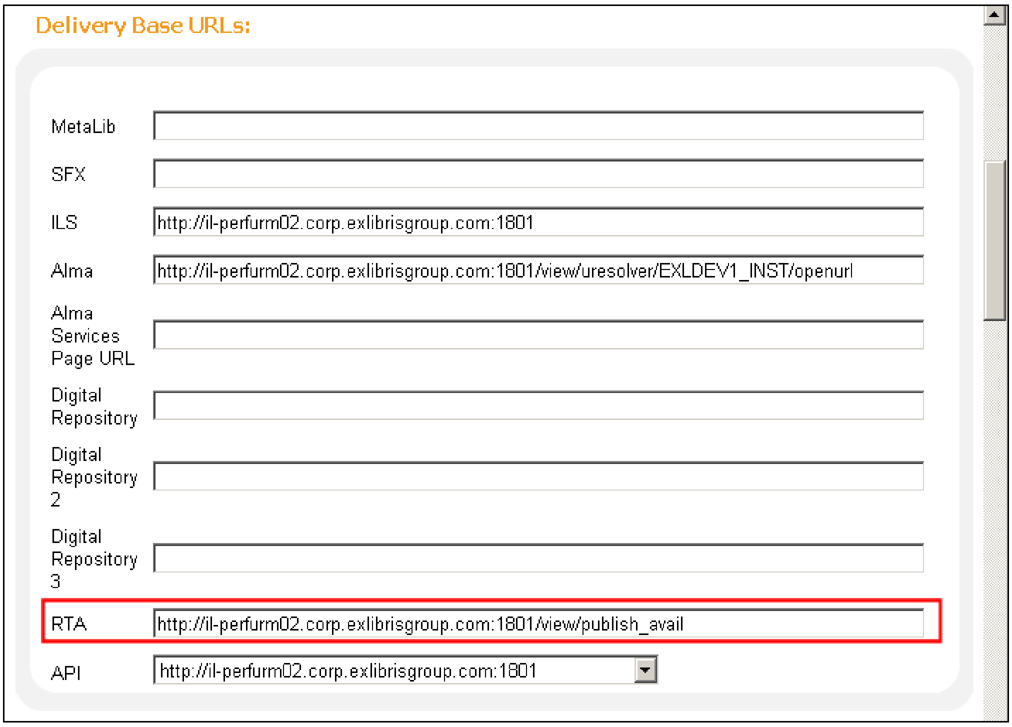


Figure 22: Institution Wizard - Setting RTA Base URL

3 On the Primo Home > Advanced Configuration > General Configuration Wizard page, select the **RTA** subsystem, type `normalization_rules` in the **RTA method for mapping data** field, and then click **Save & Continue**.

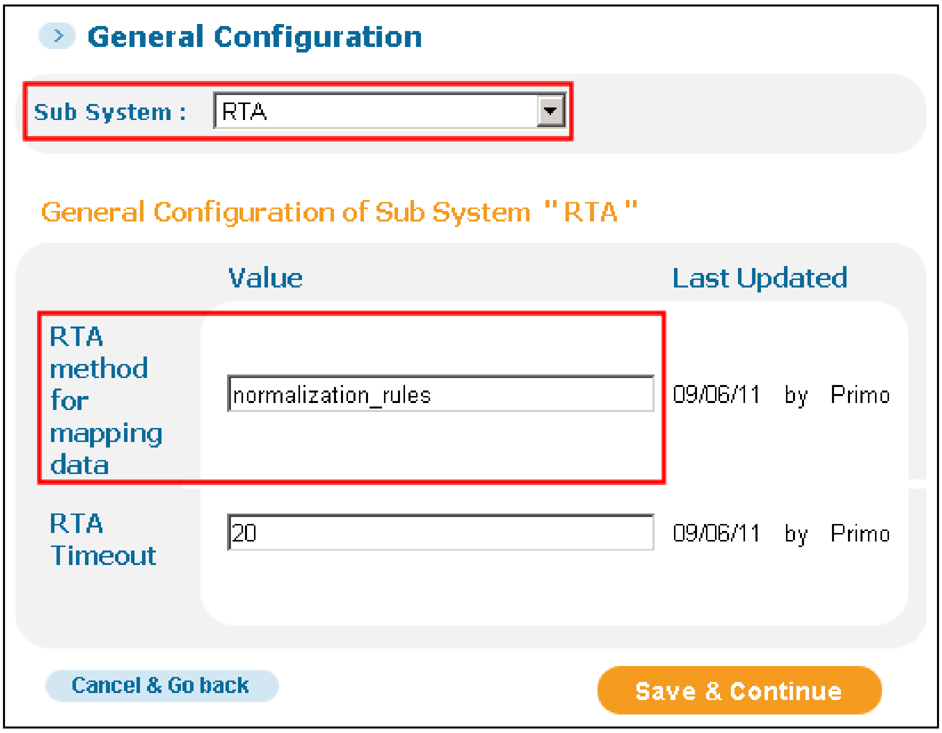


Figure 23: General Configuration Wizard - Setting RTA Mapping Method

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

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

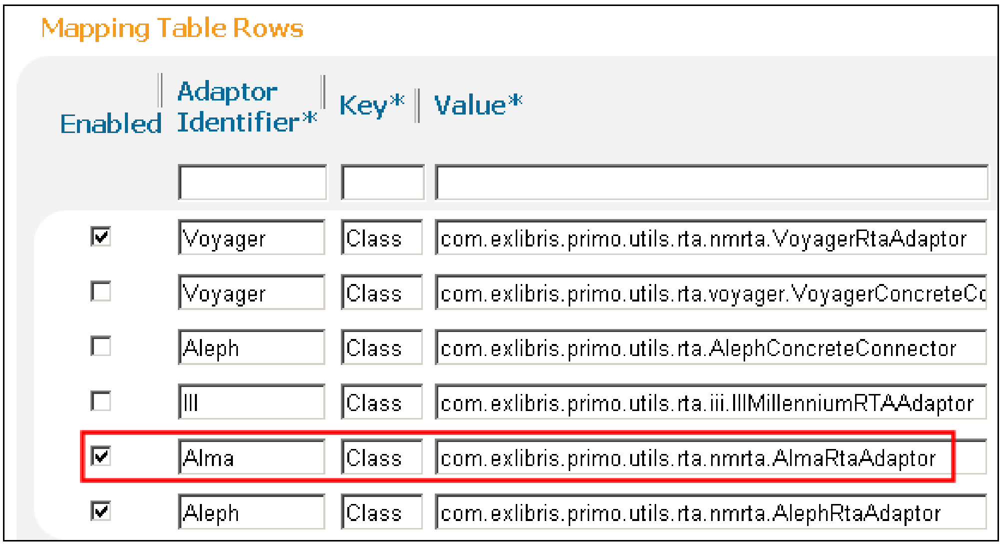


Figure 24: RTA Adaptors Mapping Table - Enabling the Alma Adaptor

6 On the Primo Home > Advanced Configuration > All Mapping Tables page, select the **Back Office** subsystem and edit the Real-Time Availability (using normalization rules) table.

7 Enable the **Alma** source system, configure the following fields, and then click **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.

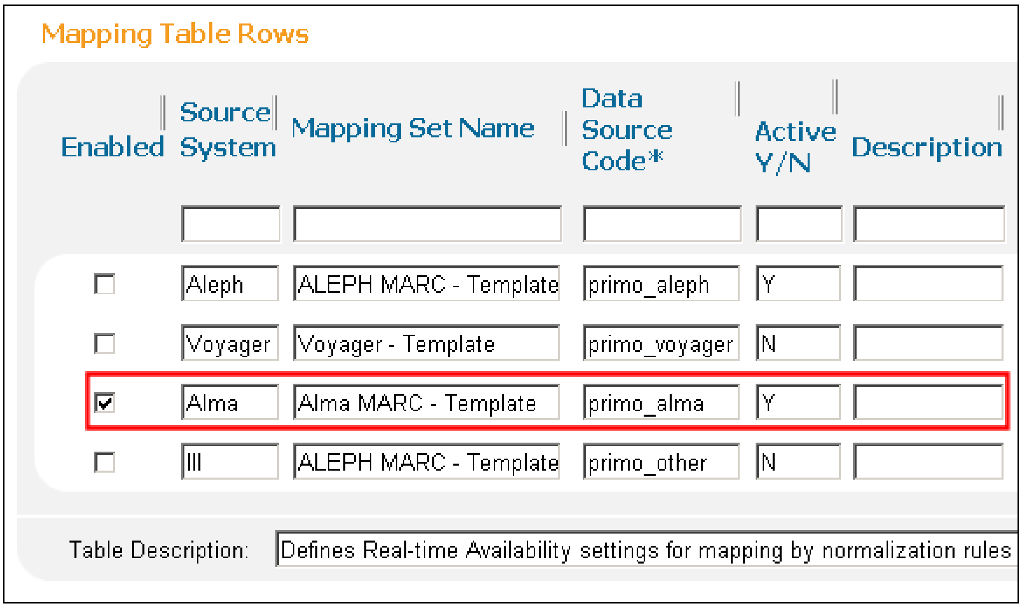


Figure 25: RTA (Using Normalization Rules) Mapping Table

NOTE:
If a change is made to the normalization rules that affects the display/availlibrary PNX field, you should deploy this table.

To check RTA results from Alma:

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

```
https://[AlmaURL]/view/publish_avail/
X?op=publish_avail&doc_num=[intellectual_entity_id&library
=<institution code>
```

For example:

```
https://alma.exlibrisgroup.com/view/publish_avail/
X?op=publish_avail&doc_num=2127320069000102l&library=01BC_
INST
```

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

Collaborative Network Support

A single Primo view can be configured to search all institutions in the Alma Collaborative Network (CN), receive availability of print resources that are held by all institutions in the CN, and request applicable print services for resources that are held by all institutions in the CN.

Availability and delivery for physical resources harvested from Alma (Alma-P) are always relative to the institution of the view. In the following example, the status is for the North Florida institution to which the active view belongs. Records that do not belong to the institution of the view default to the **Check Holdings** status. For more information, see **Availability Statuses** on page 57.

Figure 26: Available at Location in Institution

If Alma provides priority information for locations via the AVA $$P field, Primo will display the matching location with the highest priority instead of the first location that matches the availability status. For more information, see **Configuring Best Location** on page 118.

The Get It tab allows users to display the availability and holdings for other institutions in the CN and to request resources from them as well. For more information, see **The More Link and Institutions Lightbox** on page 57.

NOTE:

Availability for electronic resources (Alma-E), which appear in the View It tab, is always based on the Alma institution to which the user belongs.

Availability Statuses

To provide an availability status (which is based on the default institution of the view) in a record's brief results, the following codes have been defined in the Calculated Availability Text code table:

Table 10. Calculated Availability Text Code Table

Code	Status/Description
default.delivery.code.check_holdings_in_maininstitution	Check holdings – The institution of the view has the item, but because Primo does not have enough information, the user must check the detailed holdings in the ILS.
default.delivery.code.does_not_exist_in_maininstitution	Check holdings – The institution of the view has the item, but because Primo does not have enough information, the user must check the detailed holdings in the ILS.
default.delivery.code.unavailable_in_maininstitution_more	Check holdings – The item is not available in the institution of the view, but it belongs to additional institutions.
default.delivery.code.available_in_maininstitution	Available at {1} – There is an available item in the institution of the view.
default.delivery.code.unavailable_in_maininstitution_nomore	Checked out – The item is not available in the institution of the view and does not belong to additional institutions.

For more information on RTA, see **Configuring Real-Time Availability** on page **51**.

The More Link and Institutions Lightbox

For Collaborative Network (CN) users, the Get It tab displays the current institution (which defaults to the institution of the view), its holdings, and any additional services offered via the resource sharing and fulfillment networks. End users have the option to display holdings from other institutions (if any exist) by clicking the **More** link next to the current institution name. The number of additional institutions to select are shown in parentheses.

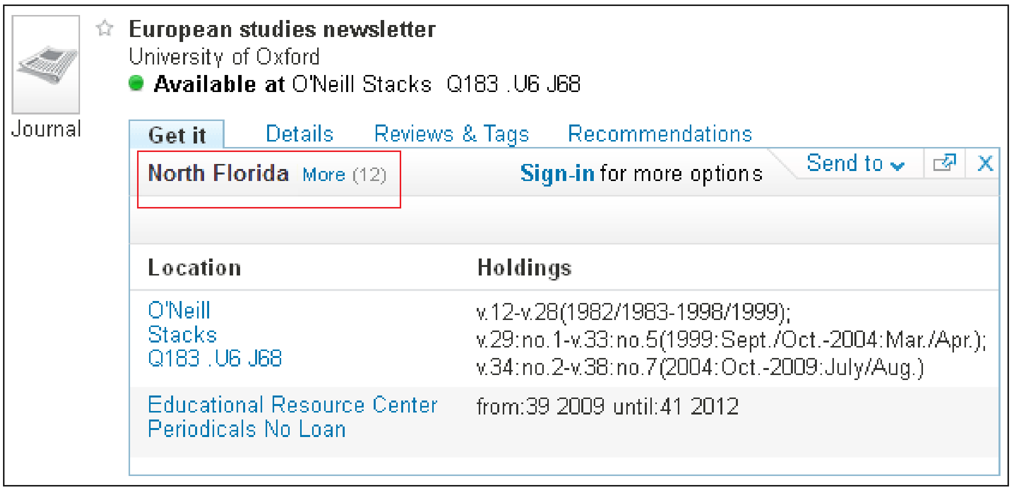


Figure 27: Get It Tab - More Link

Clicking the **More** link displays a list of the additional institutions and their calculated availability statuses. To update labels in the Institution lightbox, use the Institution Lightbox Labels code table in the Primo Back Office.

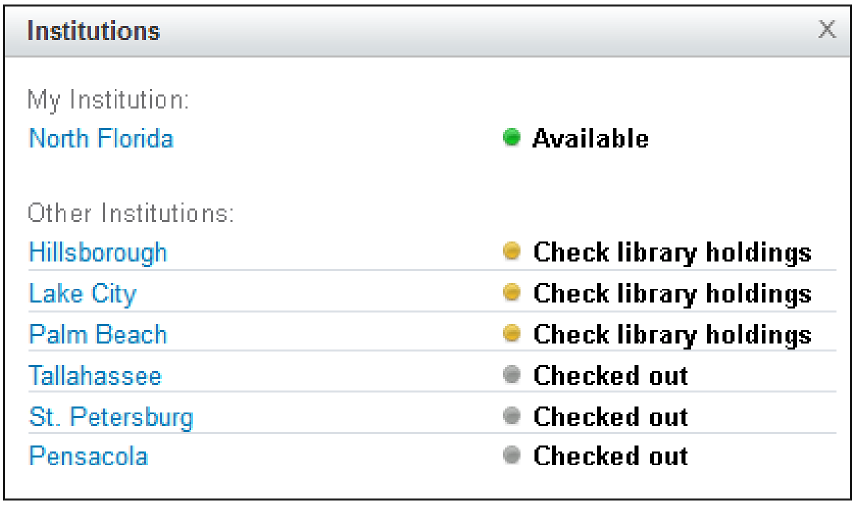


Figure 28: Institutions Lightbox

End users may click an institution to display the Get It tab with holdings and services for the selected institution.

NOTE:

Although RTA is only invoked for the institution of the view in the brief results, it is invoked for all institutions when the Institutions lightbox is opened.

If the More link is not necessary for your network, you can hide the link from end users by creating or modifying a custom CSS file on the Primo server and adding the following line to it:

```
.EXLTabHeader div.EXLTabHeaderContent
em.EXLTabHeaderContentAdditionalDataLine a {display:none;}
```

Requests from Any Member Institution

Alma allows patrons of institutions that share a common Fulfillment Network to directly request items from any non-home institution in the network.

In order for an institution to be able to supply a resource to a patron, the patron must be locally registered at that institution. Alma provides automatic registration of the patron at the non-home institution.

When discovering a Primo record that has inventory at more than one institution, the patron can simply view the inventory of another institution by selecting the **More** link in the Primo Get It tab. If the user selects a non-home institution in the network, the system automatically registers the patron at that institution, allowing the user to view the available request options and place requests based on the new locally-registered linked patron record. For more information on selecting institutions, see **The More Link and Institutions Lightbox** on page 57.

NOTE:
This feature is dependent upon the configuration of a Fulfillment Network. To configure a Fulfillment Network, contact your Ex Libris representative.

In addition, users may be permitted to place resource sharing requests via their own institutions, which interact with other institutions to obtain the requested resources for the users.

Alma Multicampus Setup in Primo

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 subscription, customer 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.

Setup

The sections below describe the special aspects of setting up a Primo institution per Alma campus. Note that it is possible to implement multicampus configurations in different ways, but the implementation should be guided by your local requirements.

Institution Wizard

If you are defining an institution per campus/library in Primo, you must configure the following information in the Institution Wizard:

- The Alma campus code must be specified in the **Alma Campus Code** field. Primo automatically stores the Alma campus code in the Alma Institution Campus Codes mapping table, which is used to map the Alma institution and campus codes to the Primo institution. The Alma institution and campus codes are separated by a colon. For example:

Table 11. Mapping to Primo Institution

Alma Institution Code/Campus Code	Primo Institution
01UNIV_INST:NORTH	NORTHC

  You can refer to this mapping table in the normalization rules (see below for more information). Note that the mapping table is hidden because the campus should be updated via the Institution Wizard only.

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

```
http://<Alma server and port>/view/uresolver/<Alma
institution code>/openurl-<Alma campus code>
```

  For example:

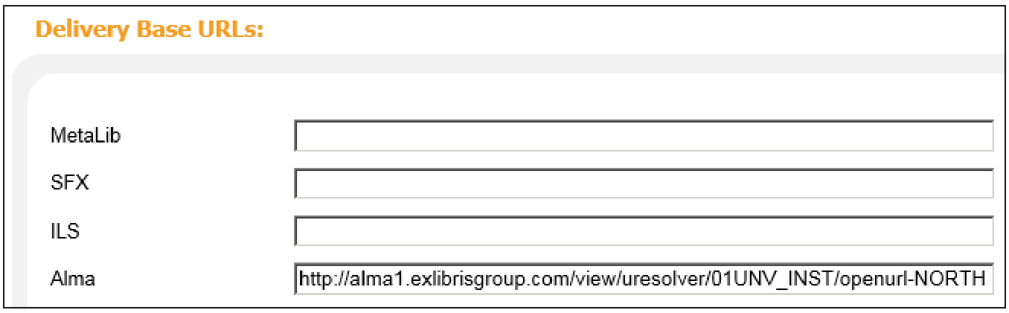


Figure 29: Delivery Base URLs

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

The normalization rules should be updated to create a delivery/institution field per Alma campus. The out-of-the-box rules create the delivery/institution field from the INST field and cannot be used to create an institution per campus. If you create a Primo institution per Alma campus, the AVE field should be used instead of the INST field. The rules can be implemented in different way. One option is to use the Alma Institution Campus Codes mapping tables to map the campus from AVE $$c to the Primo institution. For example:

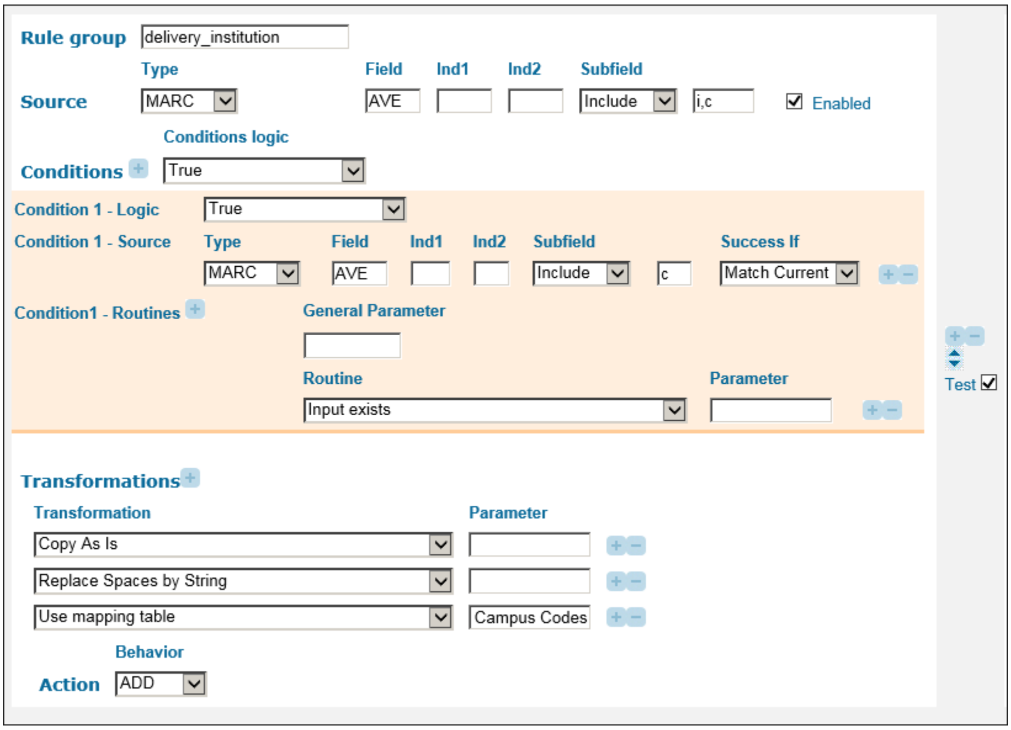


Figure 30: Alma Campus Code Mapping table in Normalization Rules

It is necessary to add a hyphen between the Alma institution code (AVE $$i) and the Alma campus code (AVE $$c) because this is how the information is stored.

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 and code tables.

Table 12. Primo Mapping and Code Table Configurations

Table	Description
Templates mapping table	The Alma campus code has been added to the following templates: ■ almasingle_services ■ almagetit_services ■ almaviewit_services. For example: `{{api_base}}/view/uresolver/{{alma_institution}}/openurl`**`{{alma_campus_code}}`**`?`
ILS Adaptors Templates mapping table	The Alma campus code has been added to the following template: ■ almasingle_services For example: `{{api_base}}/view/uresolver/{{institution}}/openurl`**`{{alma_campus_code}}`**`?`

My Account

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, refer to the *Primo Interoperability Guide*.

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** on page **9**.

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, refer to the OPAC via Primo section in the *Primo Interoperability Guide*.

Selecting an Institution

Users who have accounts in multiple institutions within a Collaborative Network (CN) will be able to view all of their accounts from My Account by selecting the institution at the bottom of the My Account menu. The current institution displays at the top of the menu.

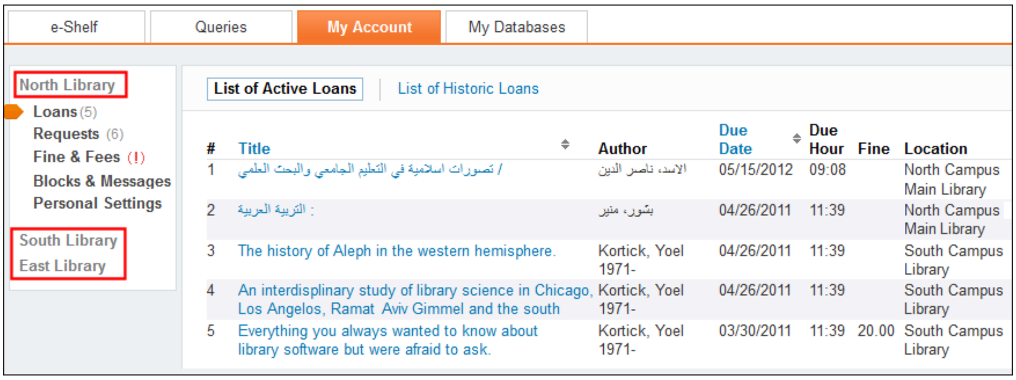


Figure 31: My Account - Multiple Institutions

Updating Patron Information

If permitted by Alma, the My Preferences section (see **Figure 32**) 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 CustomerParameters table (**General > Configuration Menu > Other Settings**) in Alma.

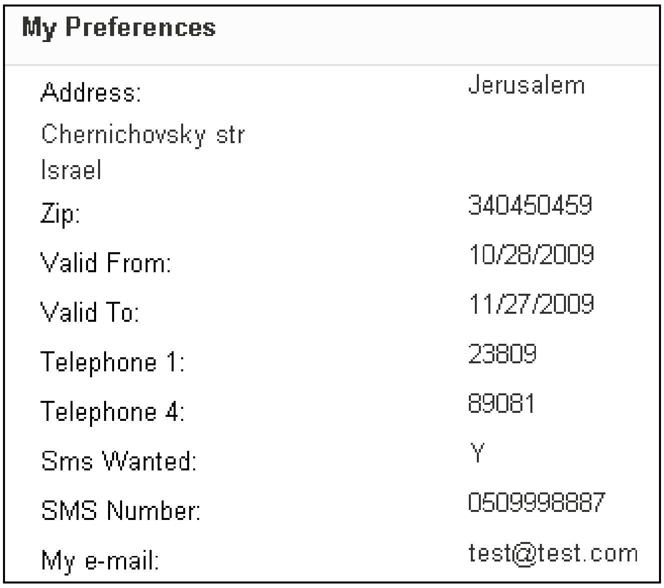


Figure 32: My Preferences Section - My Account > Personal Settings

Updating Self-Check Machine PINs

The Update Login Credentials section (see **Figure 33**) 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 (CN) 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 and have the **use_pincode_for_selfcheck_machine** parameter set to **true** in the CustomerParameters table (**User Management Configuration > Configuration Menu > Other Settings**) in Alma.

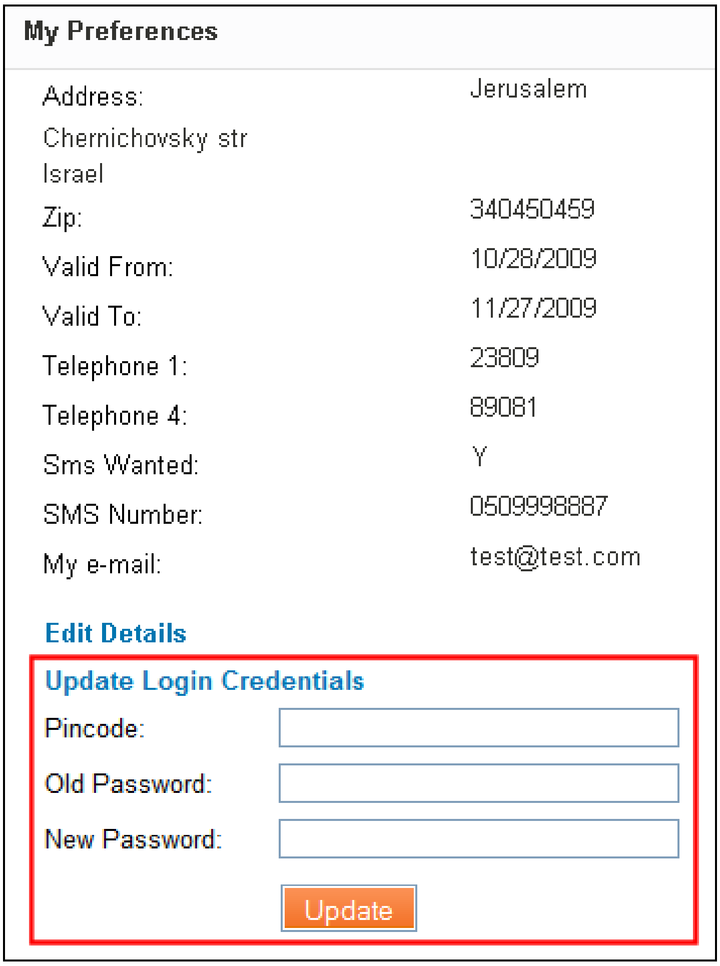


Figure 33: Login Credentials Section - My Account > Personal Settings

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 in Alma** on page 139.

To pay fines and fees via Primo:

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

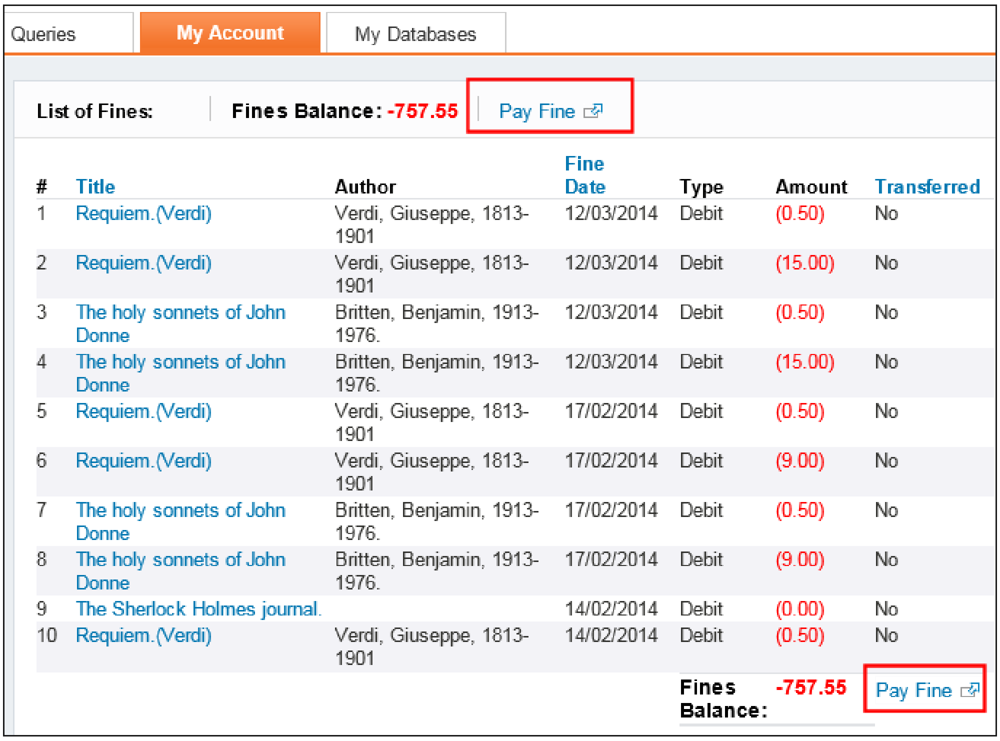


Figure 34: Fines & Fees Link in My Account

NOTE:
To configure the link that display above and below the list of fines, see **Configuring the Pay Fine Link** on page 70.

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

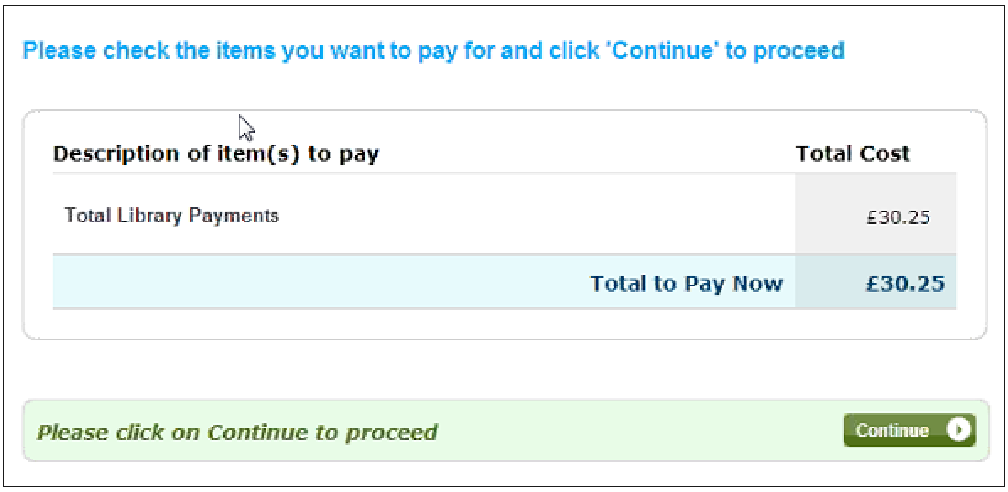


Figure 35: Sample WPM Education E-Payment System's Payments Page

3 On the WPM Education E-Payment System's Payment Method page, enter your credit card and billing address information and then click **Continue**.

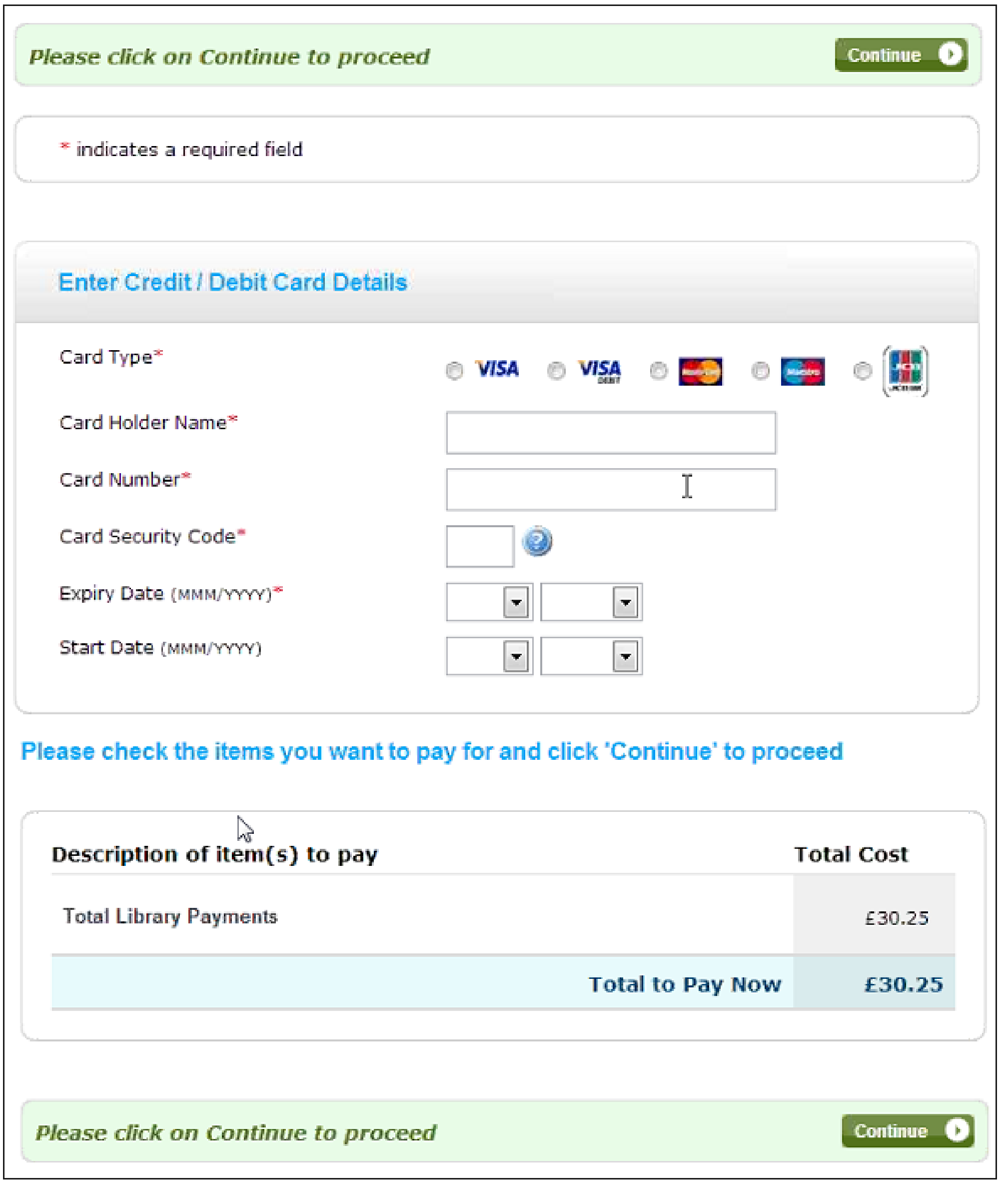


Figure 36: Sample WPM Education E-Payment System's Payment Method Page

4 On the WPM Education E-Payment System's Transaction Confirmation page, click **Confirm your transaction**.

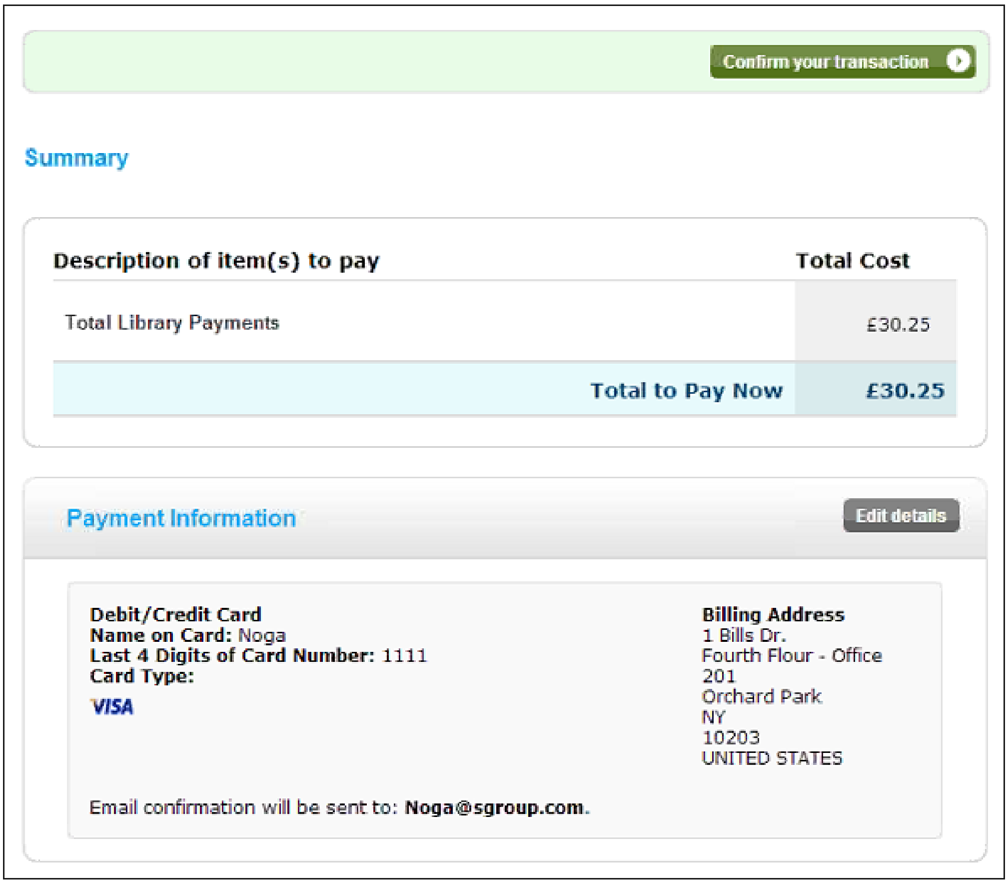


Figure 37: Sample WPM Education E-Payment System's Transaction Confirmation Page

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

Thank you for your Ex Libris payment.

Your Ucard/Library Number is ADMIN1
Cardholder Name: Noga
Card Reference:

You have made the following payment:

Library Fines
Paid today: 30.25 (GBP)
Your payment reference is: UoSSPO220423

The University receipt number for this transaction is UoSSPO220423.

Please make a note of this receipt number, in case you need to make a query about this payment.

For any Library queries please contact library@shield.ac.uk.

If you have any queries about your payment, please email onlinepayments@shield.ac.uk.

Figure 38: Sample WPM Education E-Payment System's Payment Receipt Email

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 in Alma** on page 139.

To add the Pay Fine link:

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

   The All Mapping Tables page opens.

2. Click **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 click **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 URL of the WPM Education E-Payment System.

4 Save and deploy your changes to the mapping table.

NOTE:
If you want to change the name of the link, modify the label for the **fines.payfinelink** link code in the My Account Links Labels code 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, click **All Mapping Tables**.

The All Mapping Tables page opens.

2 Click **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}}&startPos={{startPos}}
```

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 the *Primo Back Office Guide*.

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.

PERMISSIONS:

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:

1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**) click **Other Settings** under **General**.

The CustomerParameters page opens.

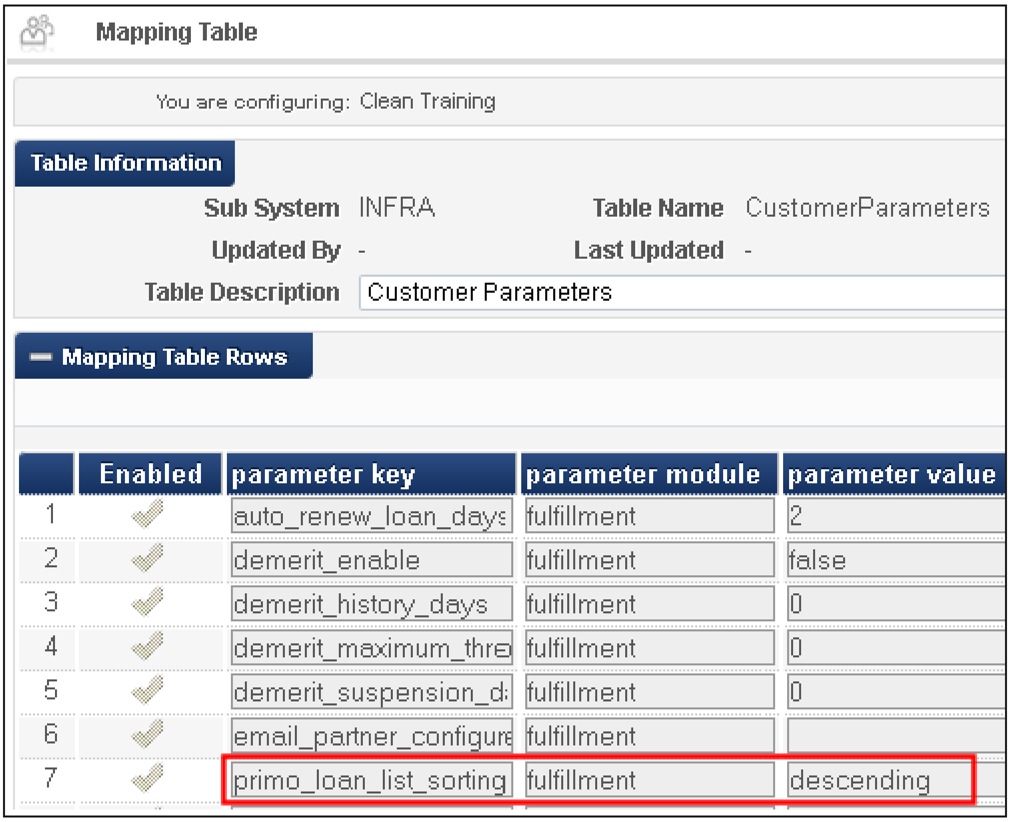


Figure 39: Figure 7 - CustomerParameters Mapping Table Page

2 In the **primo_loan_list_sorting** mapping row, set the **parameter value** field to **ascending** or **descending**. By default, the loans in the list are sorted in descending order by due date.

3 Click **Save**.

A-Z List

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.

Figure 40: 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 **atoz** label in order to create the **atoz** 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:

a For standard publishing, the following rule is used when the delivery category is **Alma-E**:

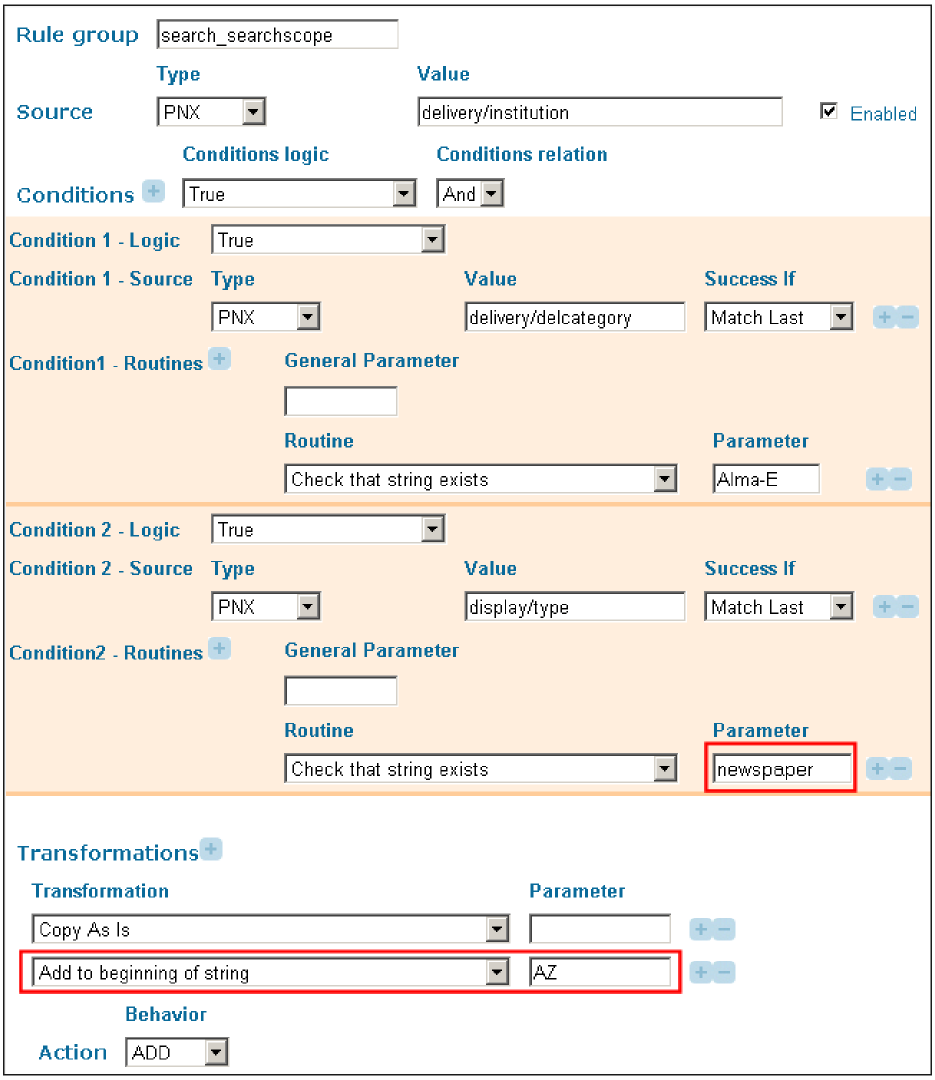


Figure 41: A-Z Search Scope Rule (Alma-E) for Standard Publishing

b For standard publishing, the following rule is used when the delivery category is **Online Resource**:

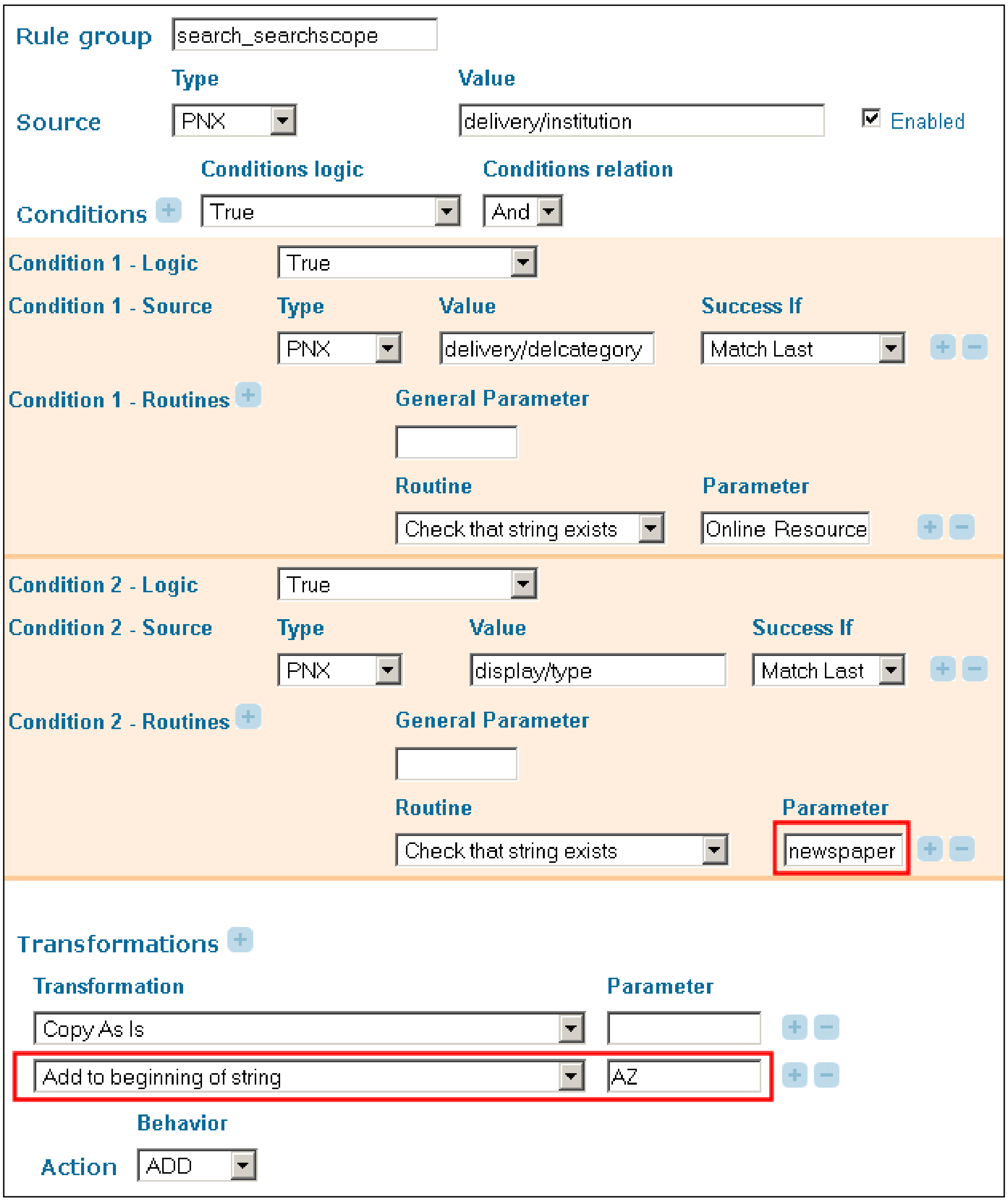


Figure 42: A-Z Search Scope Rule (Online Resource) for Standard Publishing

c For centralized publishing, the following rule is used when the delivery category is **Alma-E**:

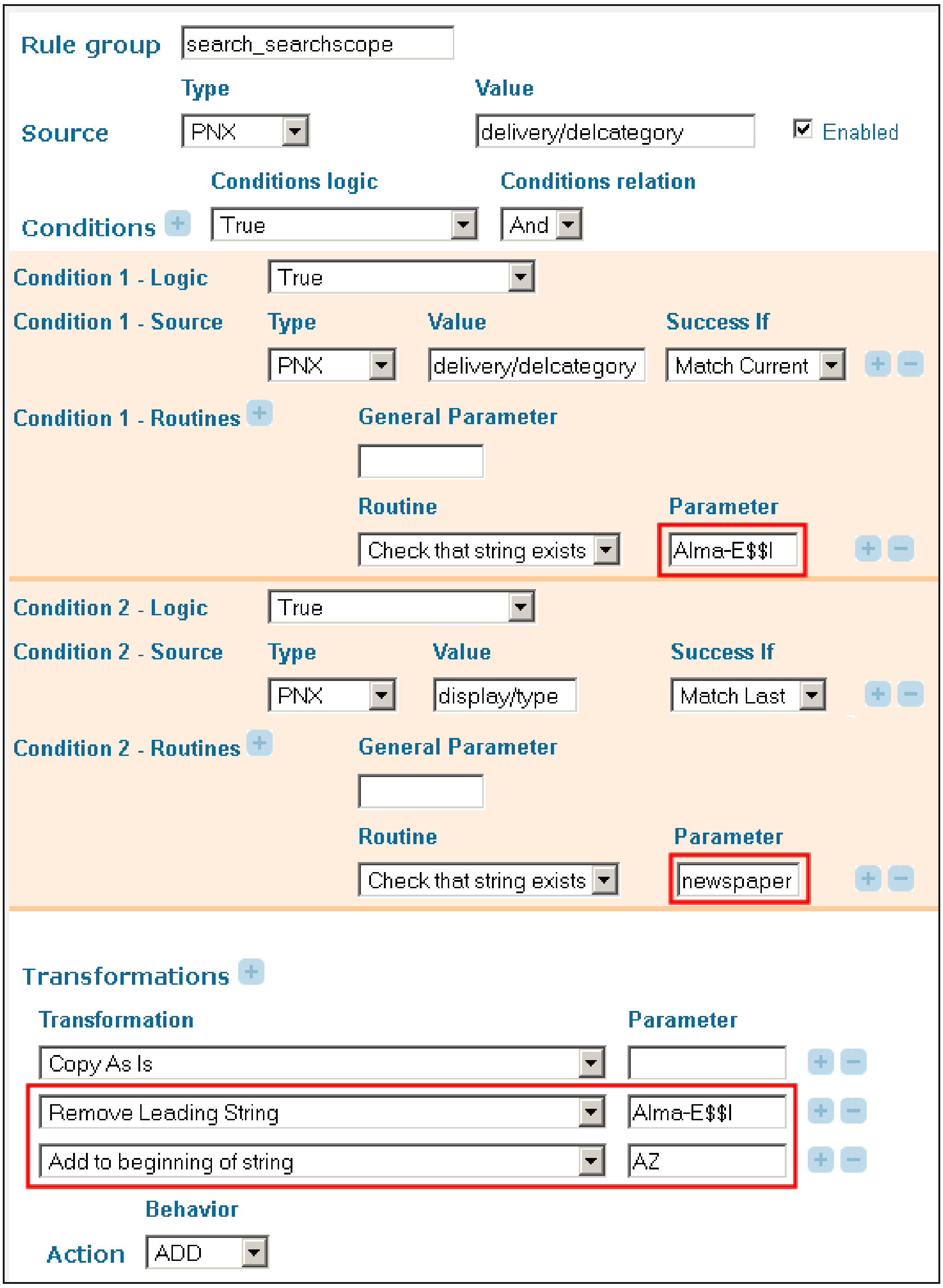


Figure 43: A-Z Search Scope Rule (Alma-E) for Centralized Publishing

d For centralized publishing, the following rule is considered when the delivery category is **Online Resource**:

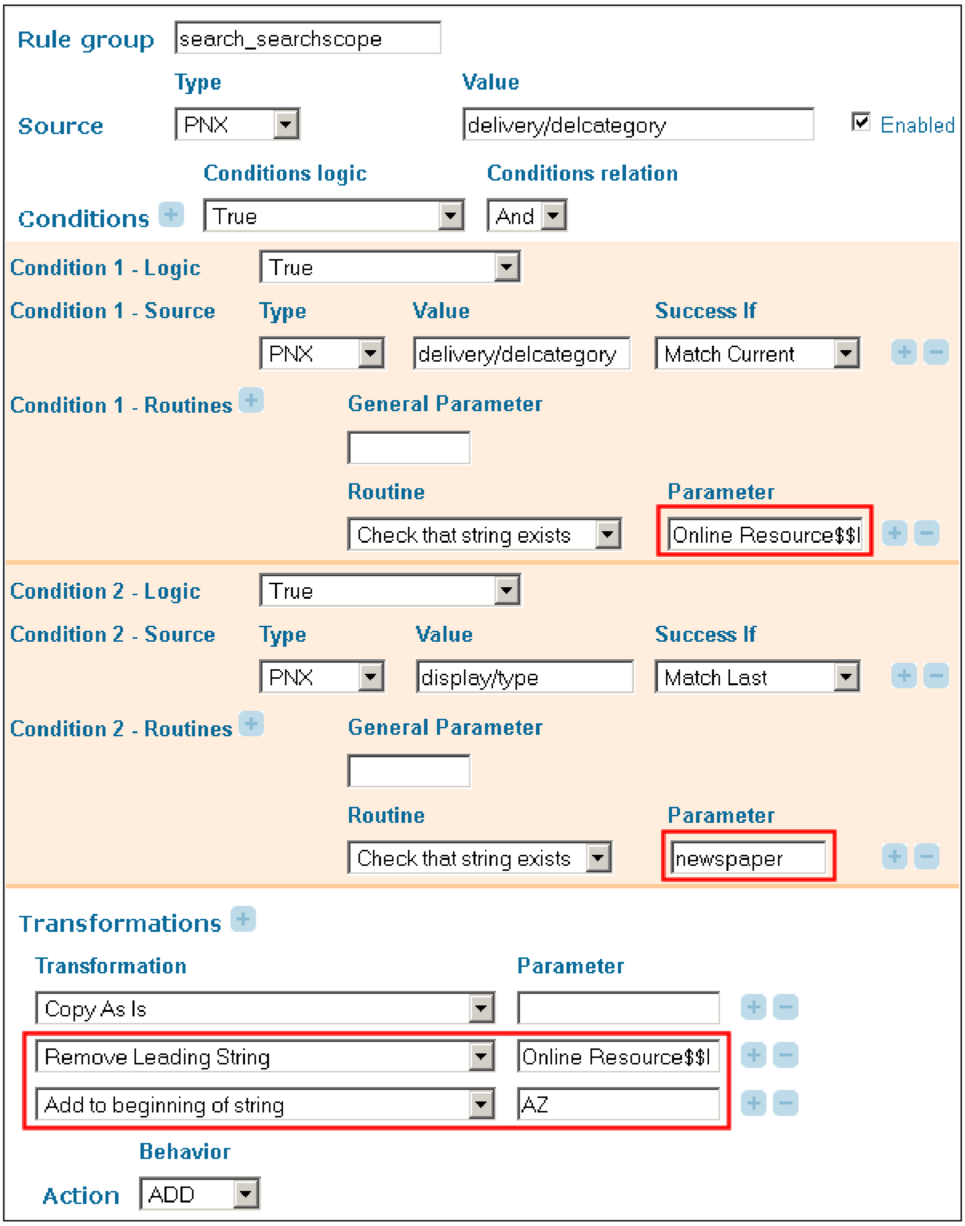


Figure 44: A-Z Search Scope Rule (Online Resource) for Centralized Publishing

e 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

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).

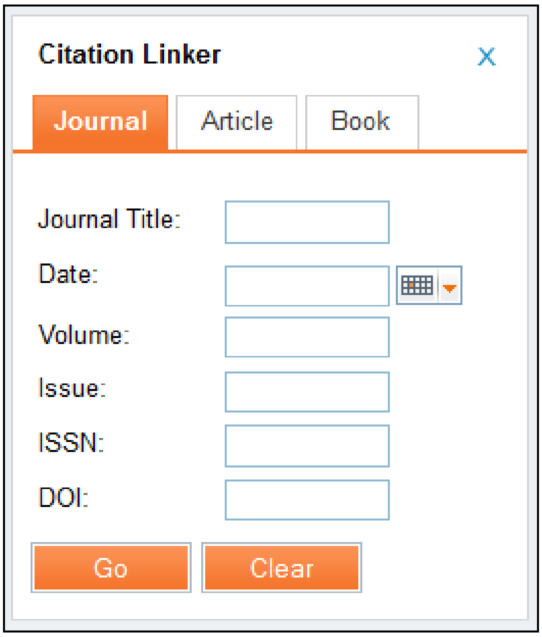


Figure 45: Citation Linker Lightbox - Journal Tab

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, refer to the *Primo Back Office Guide*.

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

1 Click the **Citation Linker** button in the Primo Front End.

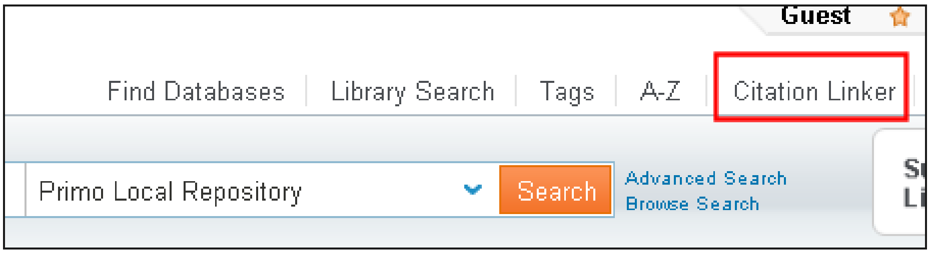


Figure 46: Citation Linker Button

The Citation Linker lightbox opens.

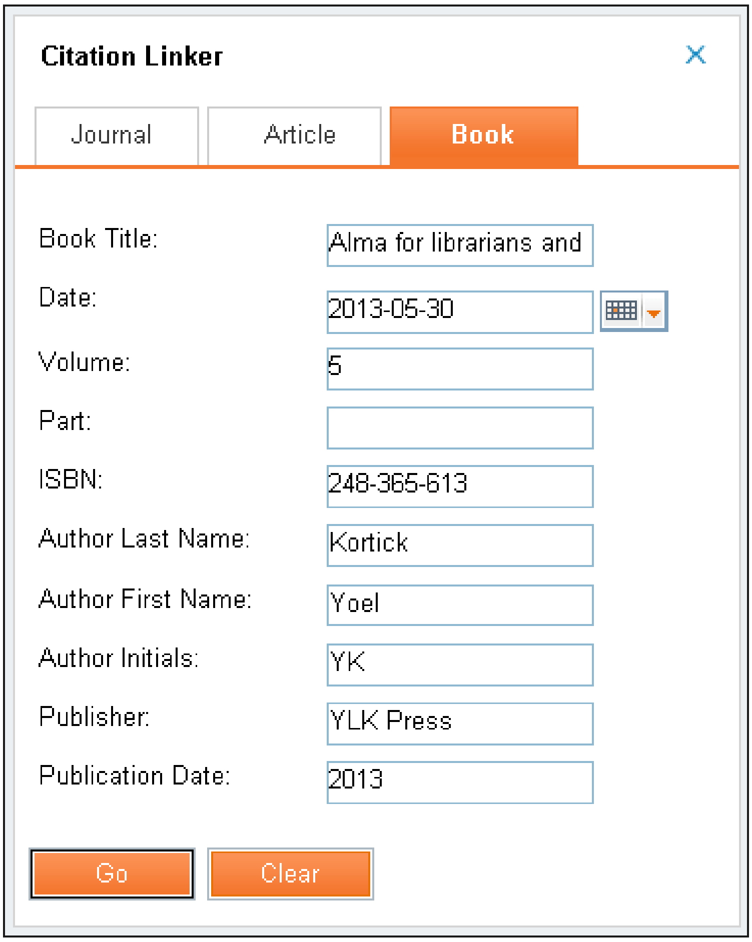


Figure 47: Citation Linker Lightbox

2 Enter the search information and click **Go**.

The results for the selected item display.

3 In the item's results, click the **Get It** tab.

The available request links display in the Get It tab.

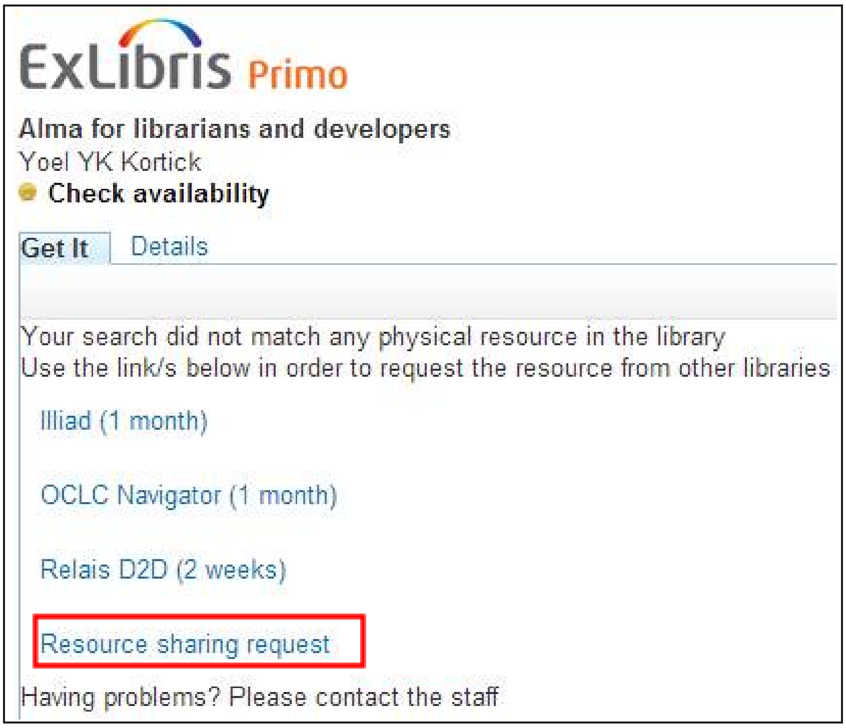


Figure 48: Get It Tab Request Links

4 Click the **Resource sharing request** link.

The Resource Sharing Request form displays in the Get It tab.

5 Fill in the Resource Information and Delivery Information sections and click **Request**.

An acknowledgement displays in the Get It tab.

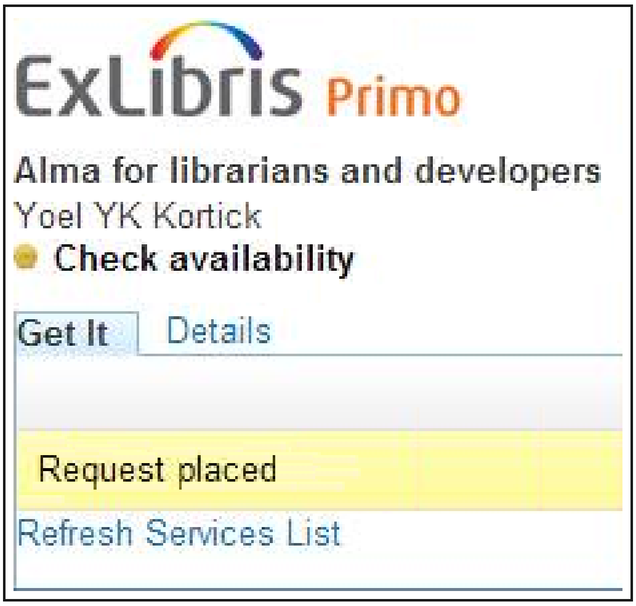


Figure 49: Request Acknowledgement Message

Direct Linking to the Resource Sharing Request Form

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.

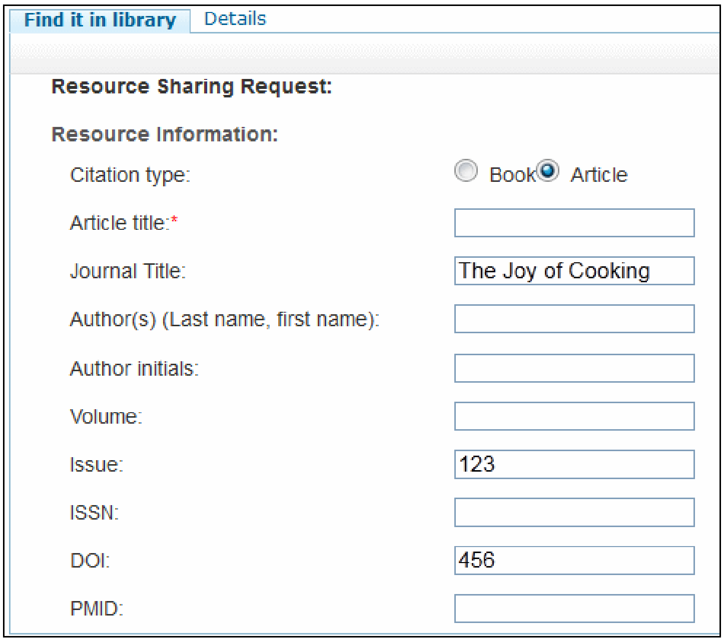


Figure 50: Resource Sharing Request Form in Alma

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

1. In the Primo Back Office, click **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. Click **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.
   - **URL** – Enter a URL to access the Resource Sharing form, using the following format:

     ```
     <pds_url>func=sso&url=<alma_api_base>/view/uresolver/
     <alma_institution_code>/openurl?
     svc_dat=getit&svc.profile=getit&directResourceSharingRe
     quest=true
     ```

     For example:

     ```
     http://
     primo1.staging.alma.hosted.exlibrisgroup.com:8991/
     pds?func=sso&url=https://qa.alma.exlibrisgroup.com/
     view/uresolver/01MY_INST/openurl?
     ```

```
&svc_dat=getit&svc.profile=getit&directResourceSharingR
equest=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 Click **Add**.

7 Save and deploy your view.

The link should display as follows in the main menu:

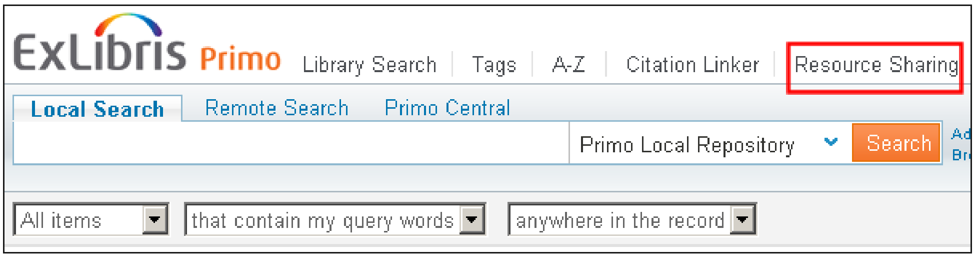


Figure 51: Resource Sharing Request Button Example

Configuring Course Reserves in Primo

Course reserve information is stored in the CNO field and is not published to Primo unless Alma is configured to publish course enrichment information. Primo can use the information stored in the CNO field for the following:

- 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

For details on the CNO field and publishing to Primo, see the following sections: **The Format of Published Data** on page **27** and **Publishing to Primo** on page **16**.

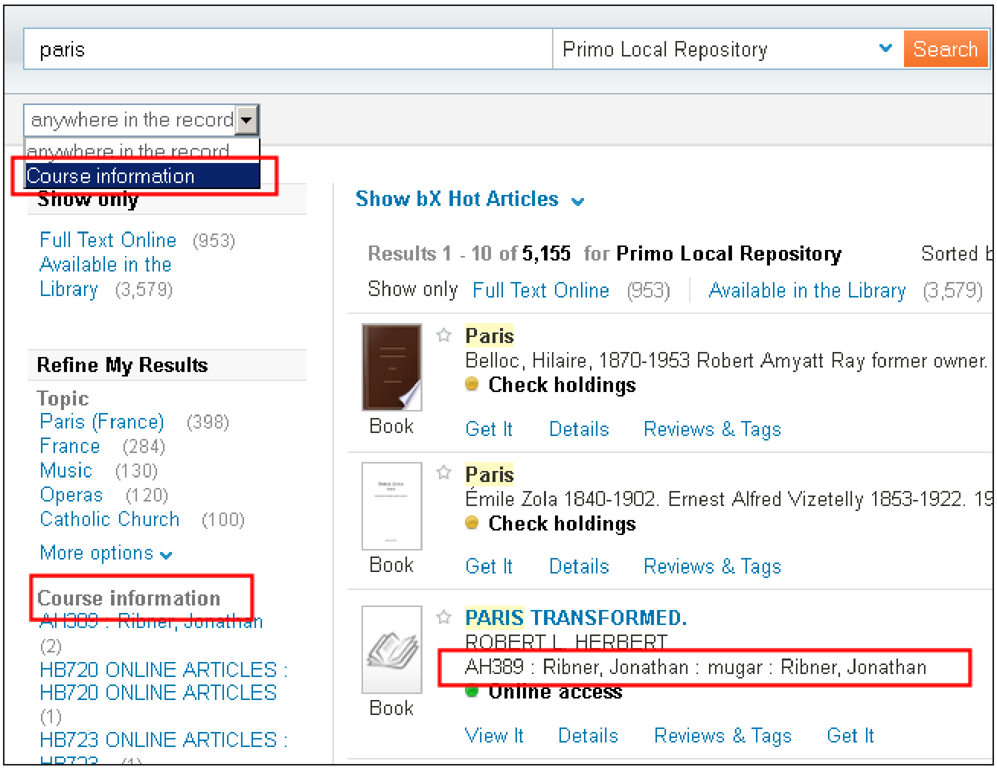


Figure 52: Course Reserves Enabled in the Front End

To configure course reserves in Primo:

1 Update the normalization rules to include course reserve information:

   a On the Primo Home > Advanced Configuration > Full Normalization Rule page, click **Edit** in the row containing your normalization rules set.

   The Manage Normalization Rules page opens.

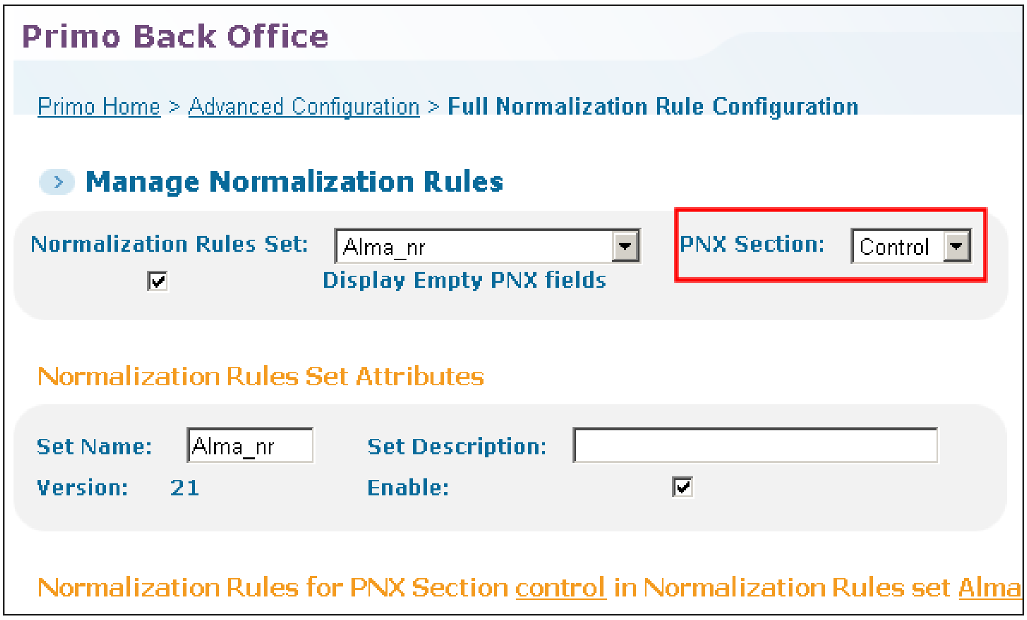


Figure 53: Manage Normalization Rules

b In the display section of the PNX, create a local display field for course reserves and include the subfields that you want to display to the users:

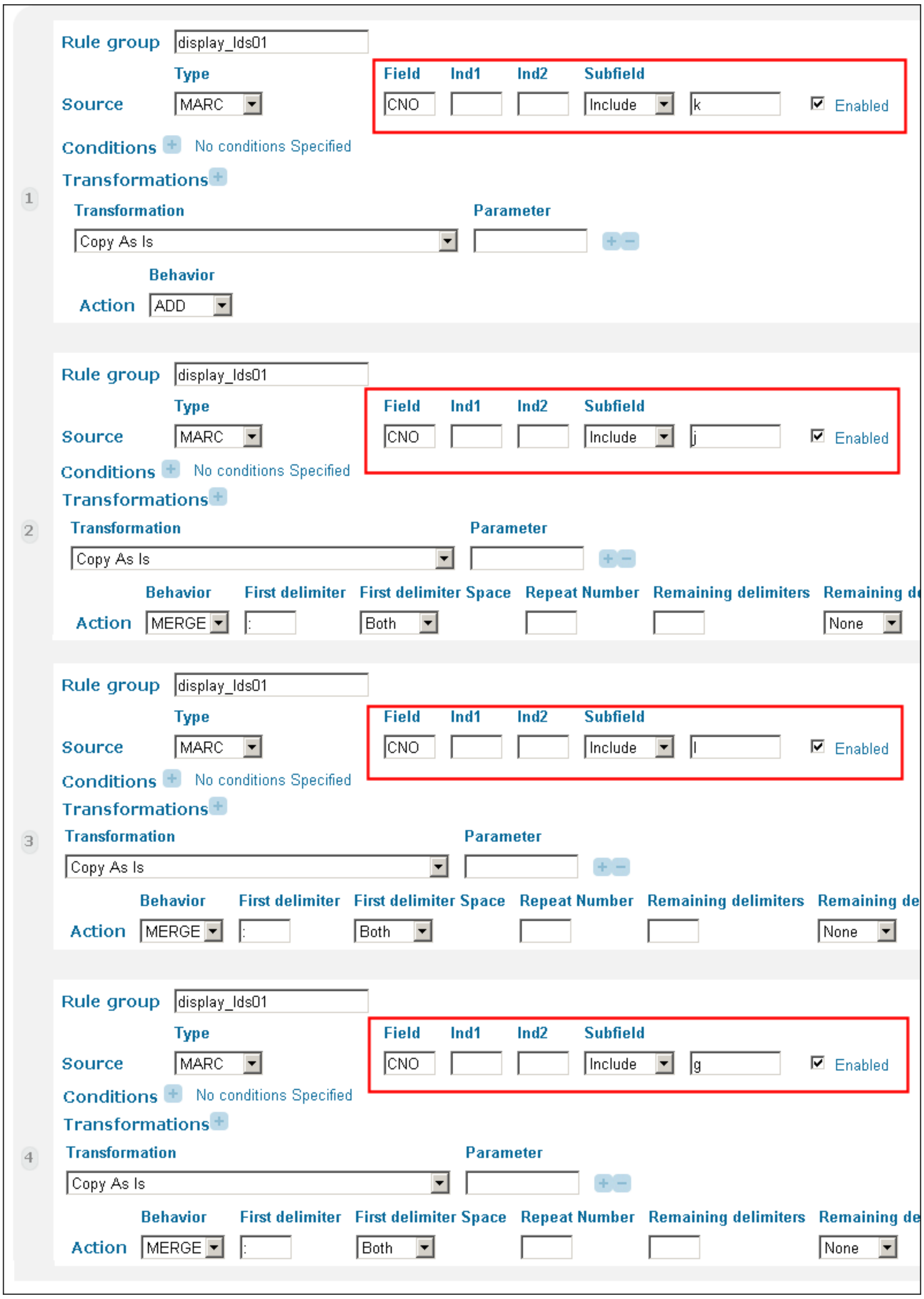


Figure 54: Display Section of the PNX

c Click **Save**.

d In the search section of the PNX, create a search scope for course reserves:

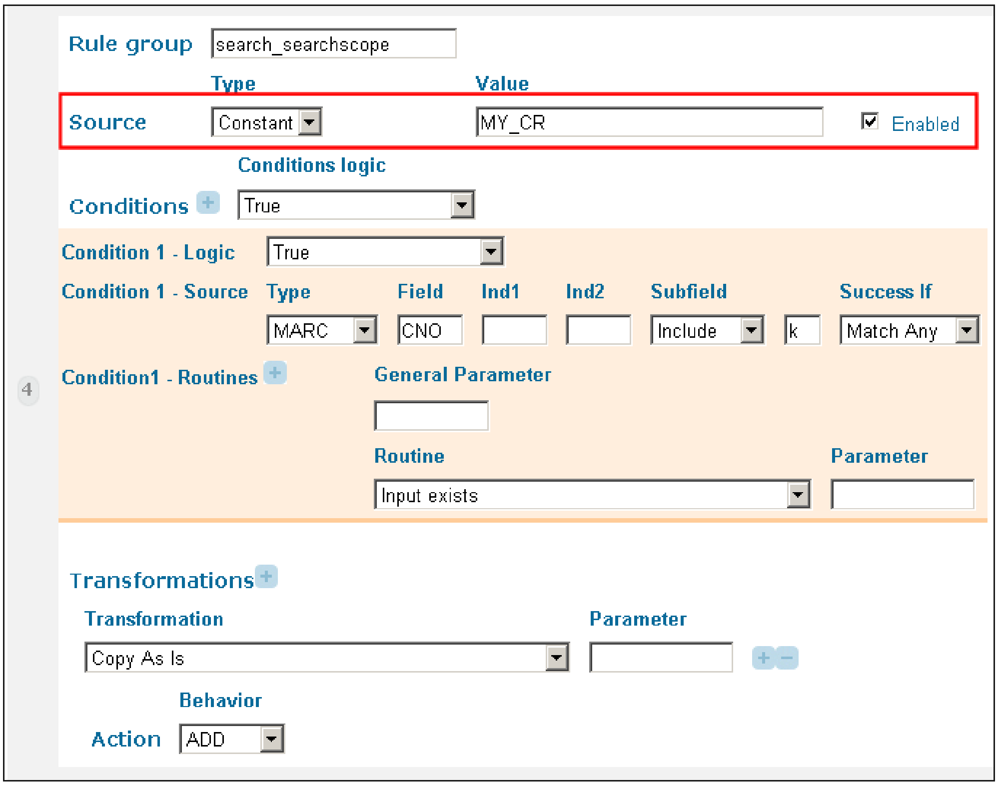


Figure 55: Search Section of the PNX - Add Search Scope

NOTE:
The constant defined in the normalization rules must match the name of the search scope value defined in the Pipe Configuration Wizard.

e Click **Save**.

f In the search section of the PNX, create a local search field for course reserves and include the subfields that you want to index:

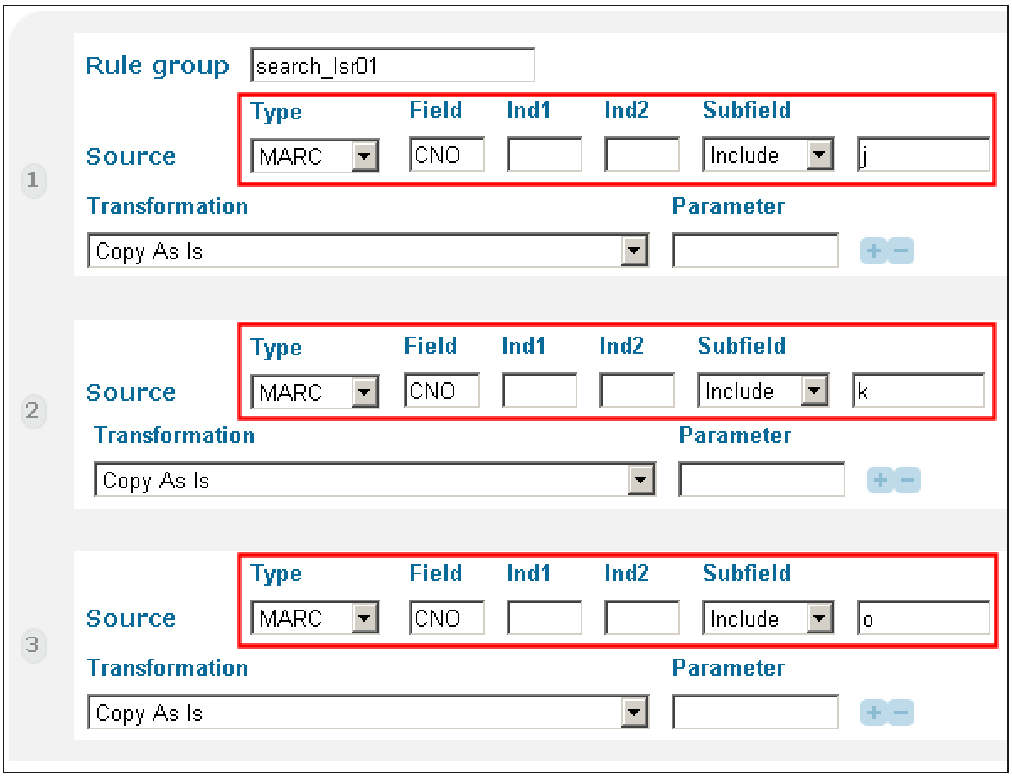


Figure 56: Search Section of the PNX - Add Local Search Field

g Click **Save**.

h In the facets section of the PNX, create a local facet field for course reserves and include the subfields that you want to display as facets:

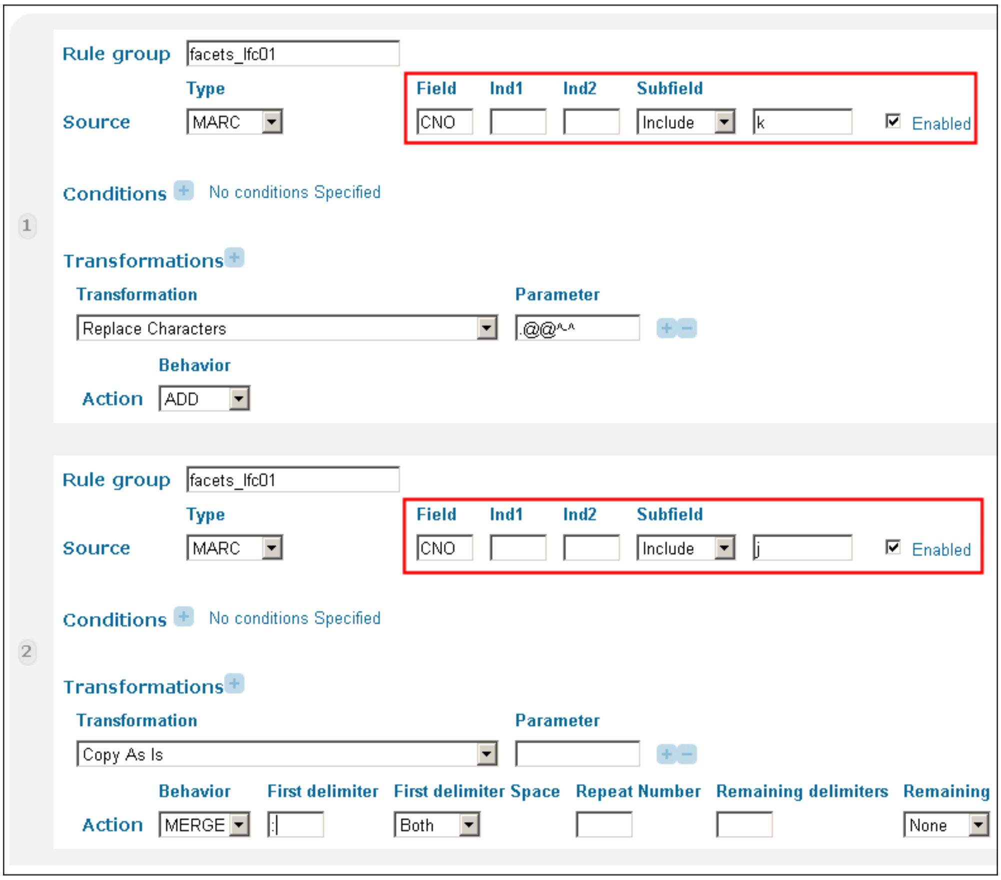


Figure 57: Facets Section of the PNX - Add Local Facets Field

i Click **Save**.

2 Configure the labels and drop-down items used for course reserves in the code tables:

a On the Primo Home > Advanced Configuration > All Code Tables page, edit the **FrontEnd Display Fields** code table and modify the description of the local display field you defined in the normalization rules:

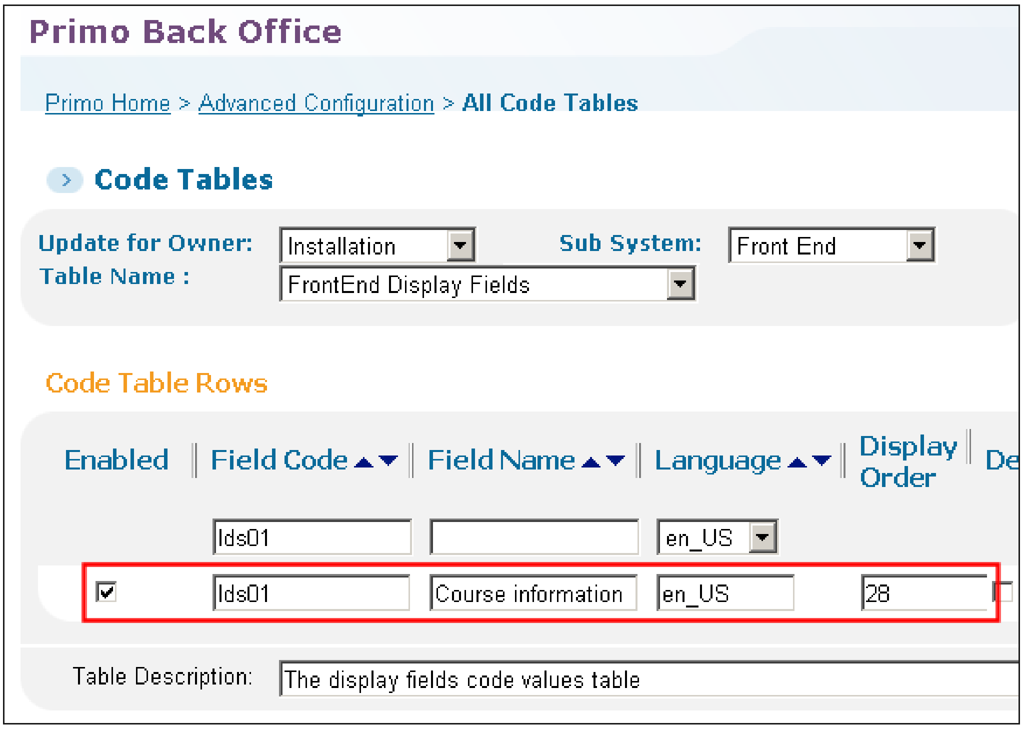


Figure 58: FrontEnd Display Fields Code Table

b On the Primo Home > Advanced Configuration > All Code Tables page, edit the **Basic Index Fields** and **Advanced Index Fields** code tables and modify the description of the local search field you defined in the normalization rules.

The following example shows the new local search field label updated for basic searches:

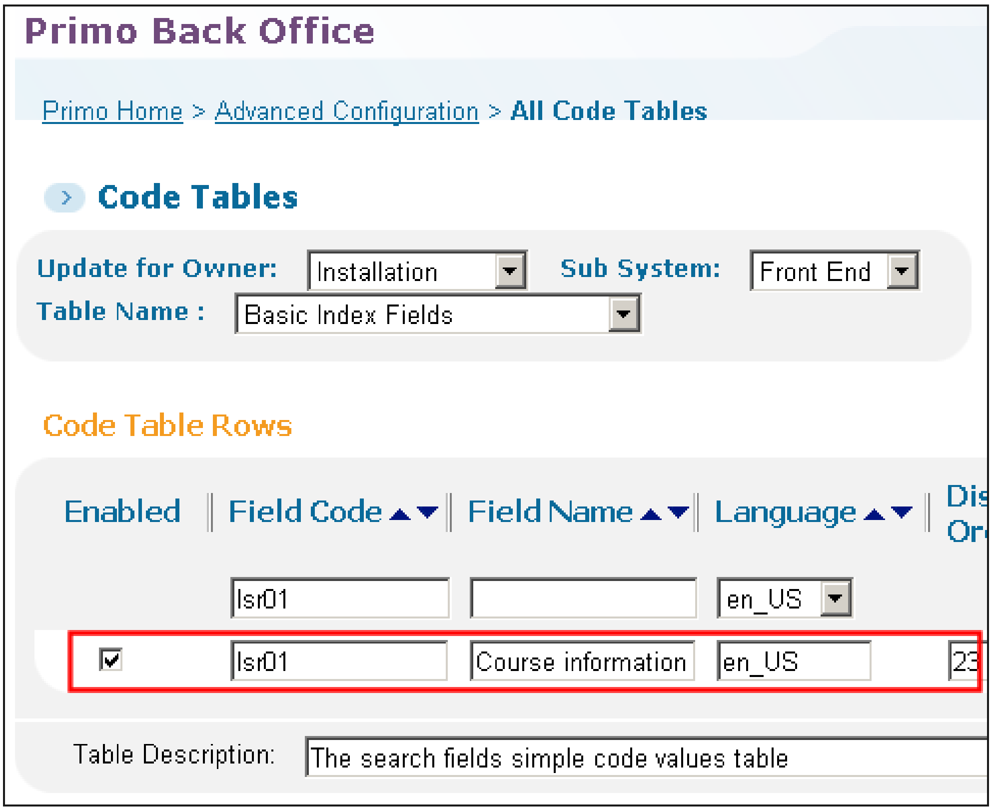


Figure 59: Basic Index Fields Code Table

c Update the label that displays for the local facet field in the Primo Front End. On the Primo Home > Advanced Configuration > All Code Tables page, edit the **Facet Labels** code table and modify the description of the local facet field you defined in the normalization rules.

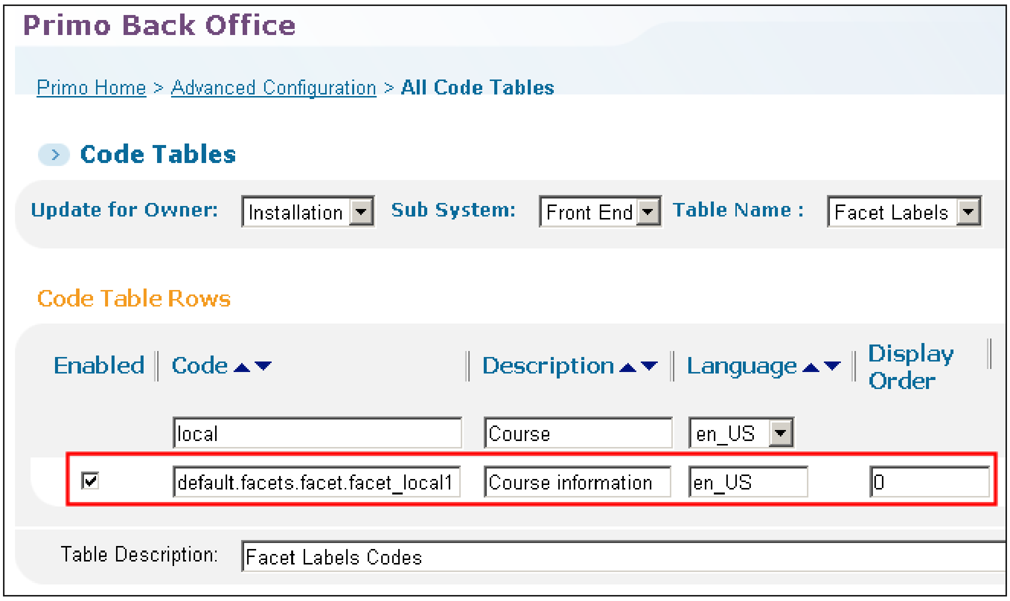


Figure 60: Facet Labels Code Table

d Update the drop-down item that displays for the local facet field in the Primo Back Office. On the Primo Home > Advanced Configuration > All Code Tables page, edit the **Facets Code Fields** code table and modify the description of the local facet field you defined in the normalization rules.

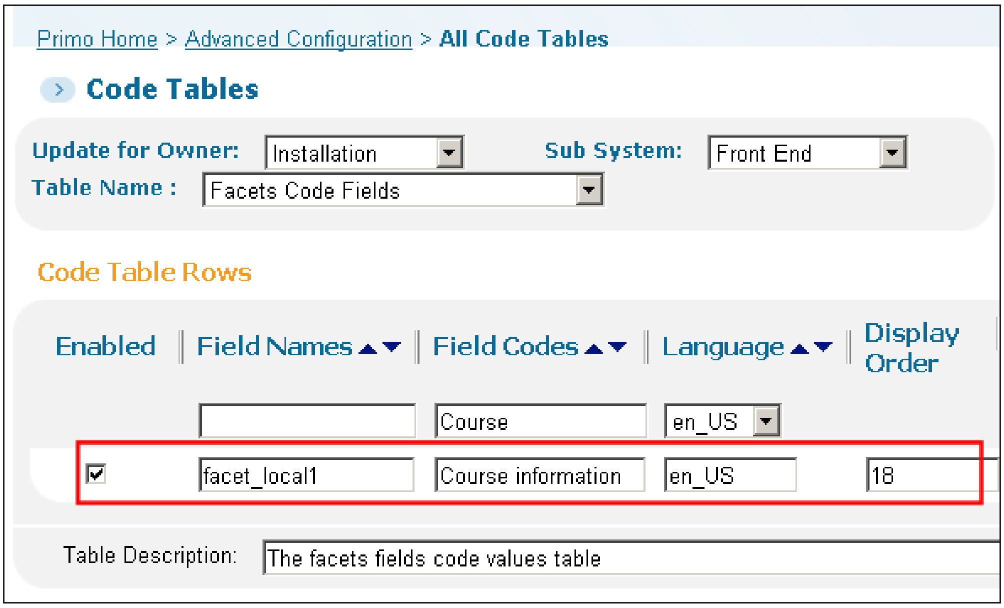


Figure 61: Facets Code Fields Code Table

3 On the Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Scope Values Configuration page, create a new search scope value.

NOTE:
The scope value must match the constant defined for the search scope in the normalization rules.

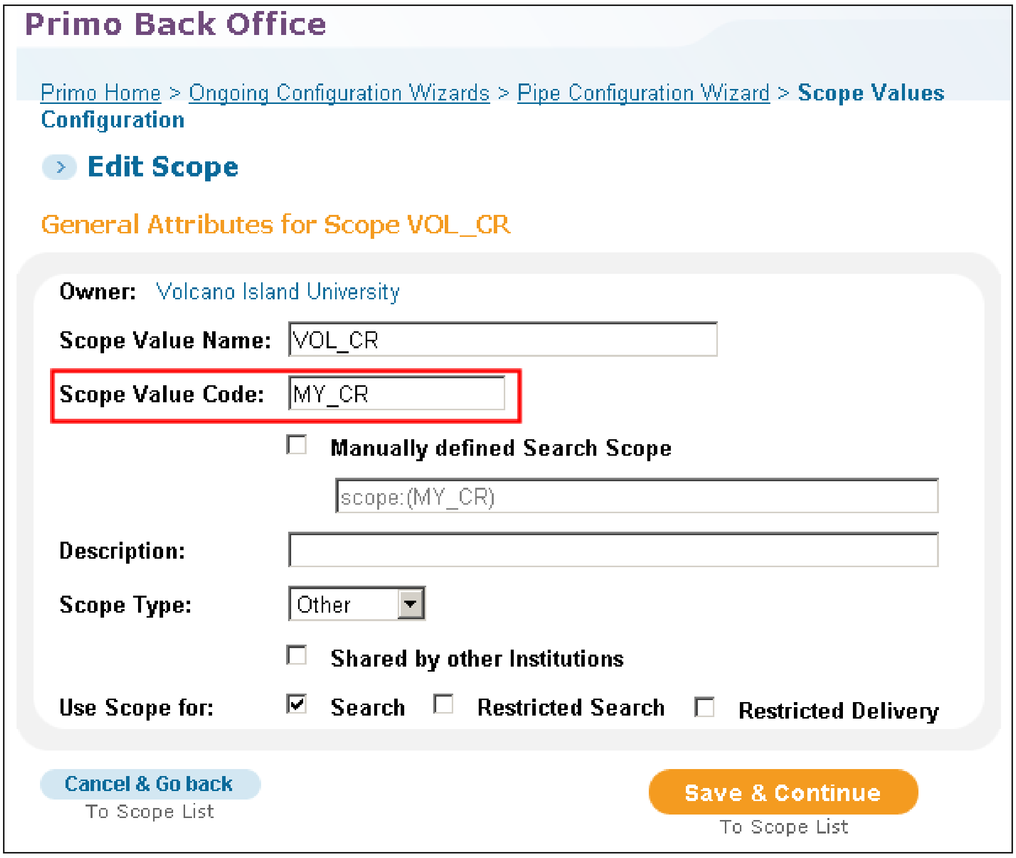


Figure 62: Pipe Configuration Wizard - Scope Value Configuration Page

4 On the Primo Home > Ongoing Configuration Wizards > Views Wizard page, enable course reserves in your view:

a Enable users to search course reserves. You can add the new search scope value to an existing scope or a new scope. You can also create a separate tab for course reserves.

For example, to add a search scope value to an existing scope, edit the search scope, select the course reserve scope value, and click **Save & Continue**:

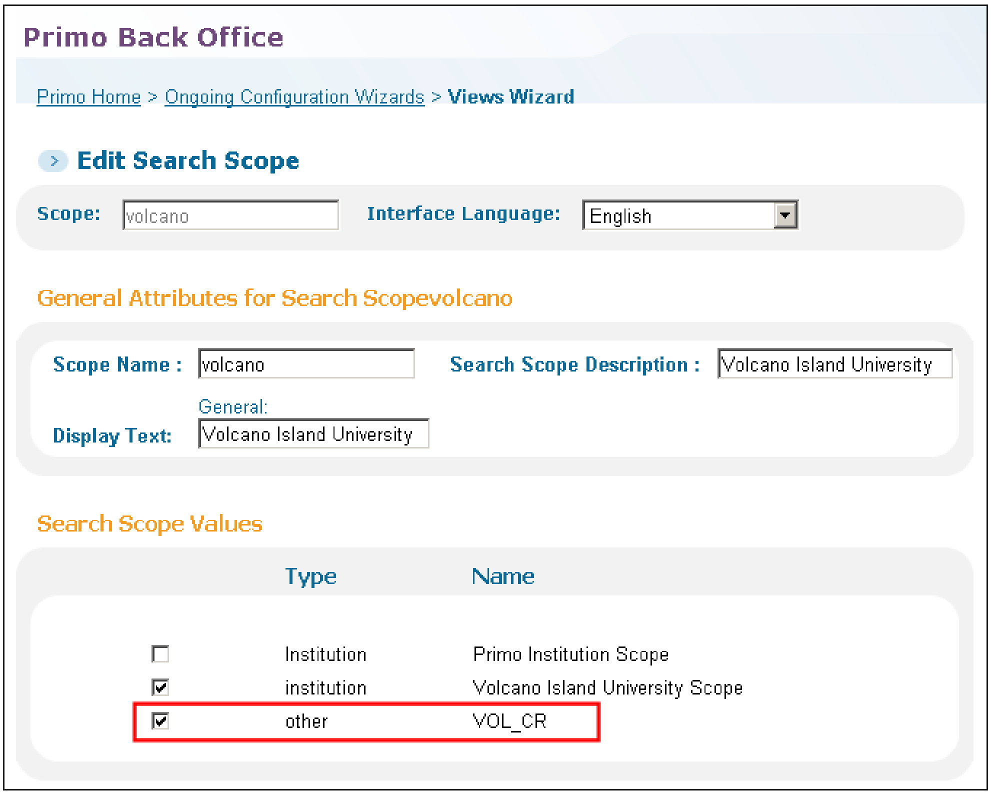


Figure 63: Views Wizard - Edit Search Scope Page

b If you want to display course information in the brief results and full display of an item, update the Basic Search and Advanced Search tiles, respectively.

The following example shows the new local display field added to the full display:

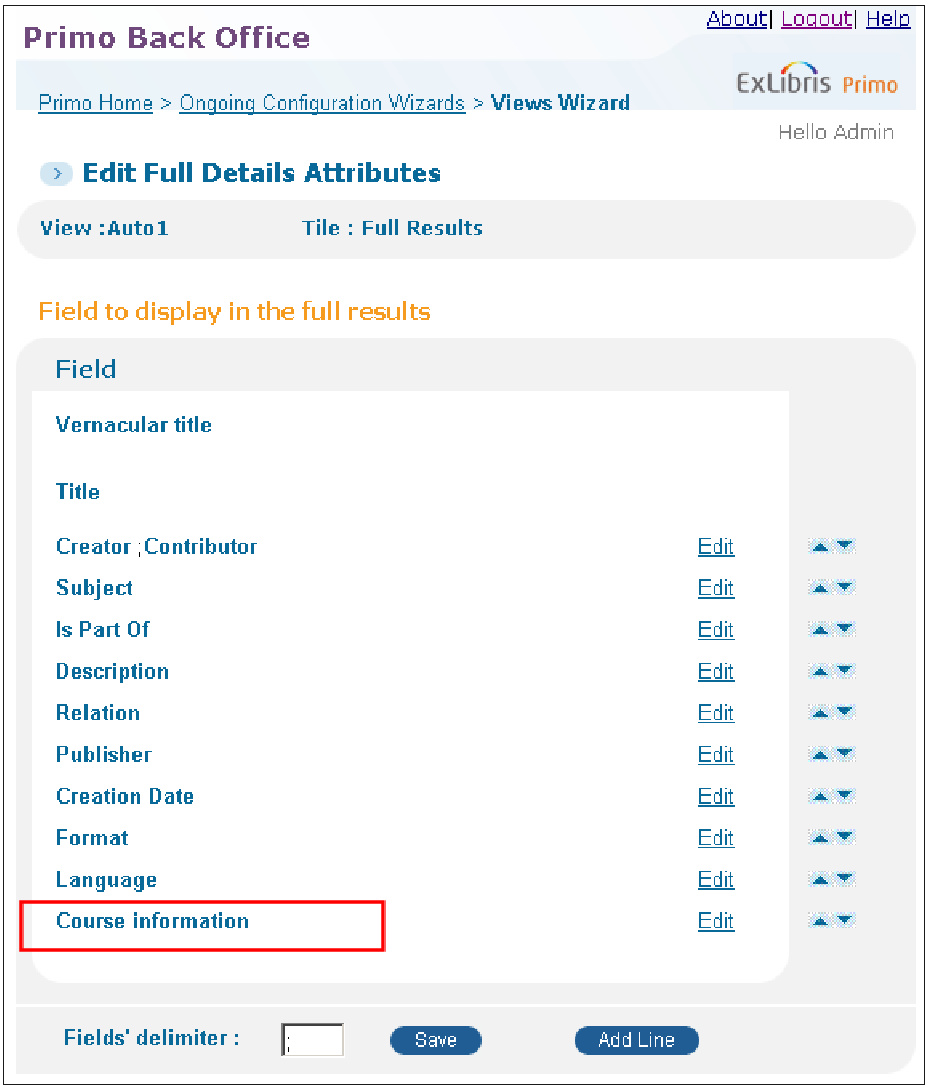


Figure 64: Views Wizard - Full Results Tile

c If you want to display facets for the course information, add the local facet field to the Brief Display > Refine My Results (Facets) tile.

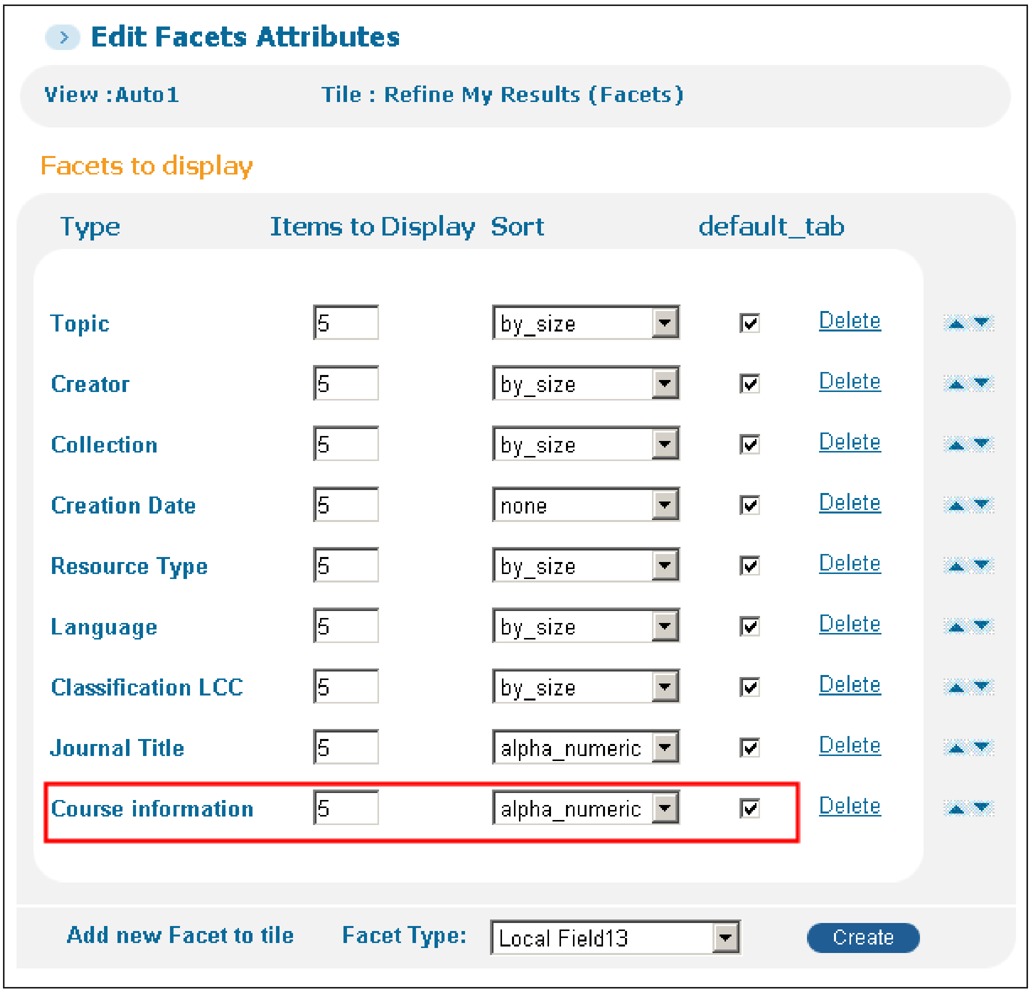


Figure 65: Views Wizard - Refine My Results (Facets) Tile

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

6 Reload and re-index the records harvested from Alma.

5

Configuring the Primo Front End for Alma’s Link Resolver

This section includes:

Introduction

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 **Figure 66**) 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** on page **98**.
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.

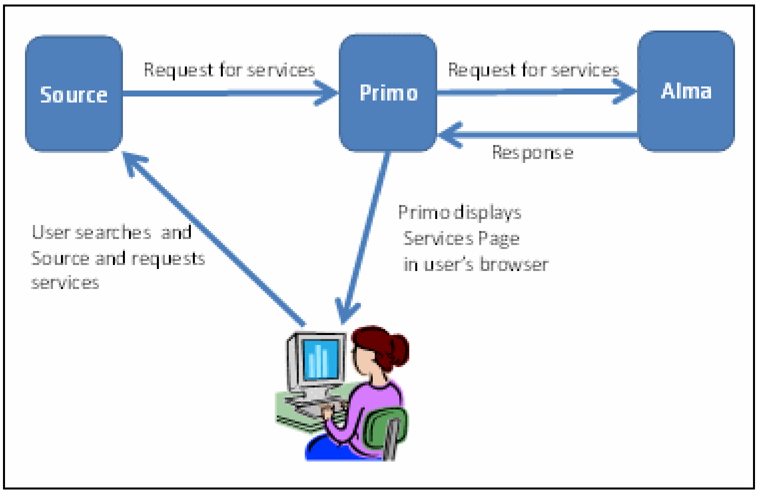


Figure 66: Alma Services Page Process Flow

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

Base_URL 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 server host:port>/openurl/<primo
institution_code>/<primo view_code>?
```

Where the base URL includes the following elements:

- **Primo server** and **port** – Specify the Primo Front End server and port. In the case of multiple FE servers, use the server that serves as the load balancer.
- **Services component code** – Set to **openurl** to use the services component.
- **Primo institution** – Specify the institution code used in Primo.
- **Primo view code** – Specify the code of your Service Page view.

For example:

```
http://primo2.prod.alma.hosted.exlibrisgroup.com:1701/
openurl/BCL/sp_view?ctx_enc=info:ofi/enc:UTF-
8&ctx_id=10_1&ctx_ver=Z39.88-2004&url_ctx_fmt=info:ofi/
```

```
fmt:kev:mtx:ctx&url_ver=Z39.88-2004&rft.issn=0000-
0019&rft.date=1995
```

Description of the Services Page

The Services Page is a dedicated Primo page that is based on the Full Display page in Primo. It 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** on page **101**.
  - Details tab – 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 section in the *Primo Interoperability Guide*.

NOTE:
In your bX My Profile, you must configure bX to use Alma's link resolver. For more information, see **bX** in the *Alma Integrations Guide*.

  - 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 the *Primo Back Office Guide* in the Documentation Center.

Table 13. Views Wizard Settings

Views Wizard Page	Element
General Attributes	All are relevant except for the following attributes: ■ Enable My Library Card ■ Personalized ranking ■ Invoke automatic search ■ Session timeout URL – When a session times out, the system uses the active services page view.
Search scope list	Not applicable.
Tabs configuration	Not applicable.
Home Page > Basic Search Tile	Not applicable.
Home Page > Advanced Search	Not applicable.
Home Page - Main Menu	The Services Page does not display the out-of-the-box options, but you can add new ones.
Home Page > Static HTML	The Services Page uses the Header and Footer static HTML files only.
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

After Primo modifies and forwards the OpenURL request to Alma, Alma determines the available services for the requested title and returns an XML response, which contains the available services status and associated metadata. Primo creates the PNX from the metadata, and uses the following available service statuses to determine which availability status and delivery tabs to display on the Services Page:

- **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 andGet It services are available, but there is no full text.

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).

Table 14. Delivery Configuration Mapping Tables

Mapping Table	Use	Delivery Category / Status	Definition
GetIt Link 1 Configuration	Defines the main delivery option (Get It 1).	Remote Search Resource / viewit_FT or viewit_NFT	The system uses the **almaviewit_services** template to request View It services from Alma. **NOTE:** 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.
		Remote Search Resource / getit	The system uses the **almagetit_services** template to request Get It services from Alma.
		Remote Search Resource / viewit_getit_FT or viewit_getit_NFT	The system uses the **almaviewit_services** template to request Get It services from Alma.
GetIt! Tab 1 Text Configuration	Defines the codes used for the label of the GetIt 1 tab. The text is defined in the code tables.	All	Every delivery category/status has a separate code. See mapping table for details.

Table 14. Delivery Configuration Mapping Tables

Mapping Table	Use	Delivery Category / Status	Definition
GetIt! Link 2 Configuration	Defines the secondary delivery option (Get It 2).	Remote Search Resource / viewit_getit_FT or viewit_getit_NFT	The system uses the **almagetit_services** template to request Get It services.
		Remote Search Resource / viewit	GetIt 2 is not defined. There are no additional options.
		Remote Search Resource / viewit_FT or viewit_NFT	GetIt 2 is not defined. There are no additional options.
GetIt Tab 2 Text Configuration	Defines the codes used for the label of the GetIt 2 tab. The text is defined in the code tables.	All	Every delivery category/status has separate code. See this mapping table for details.

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 15. Delivery Configuration Code Tables

Code Table	Use	Delivery Category / Status	Definition
GetIt! Tab 1	Defines label for the GetIt 1 tab.	Remote Search Resource / viewit_FT, viewit_getit_NFT, viewit_getit_FT, viewit_getit_NFT	View It
		Remote Search Resource / getit	Get It

Table 15. Delivery Configuration Code Tables

Code Table	Use	Delivery Category / Status	Definition
GetIt! Tab 2	Defines label for GetIt 2 tab.	Remote Search Resource / viewit_getit_FT, viewit_getit_NFT	Get It
		Remote Search Resource / viewit_getit_FT, viewit_getit_NFT	Not defined. There is no GetIt 2 in this case.

Configuring the OpenURL Link Action (V4.9)

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.

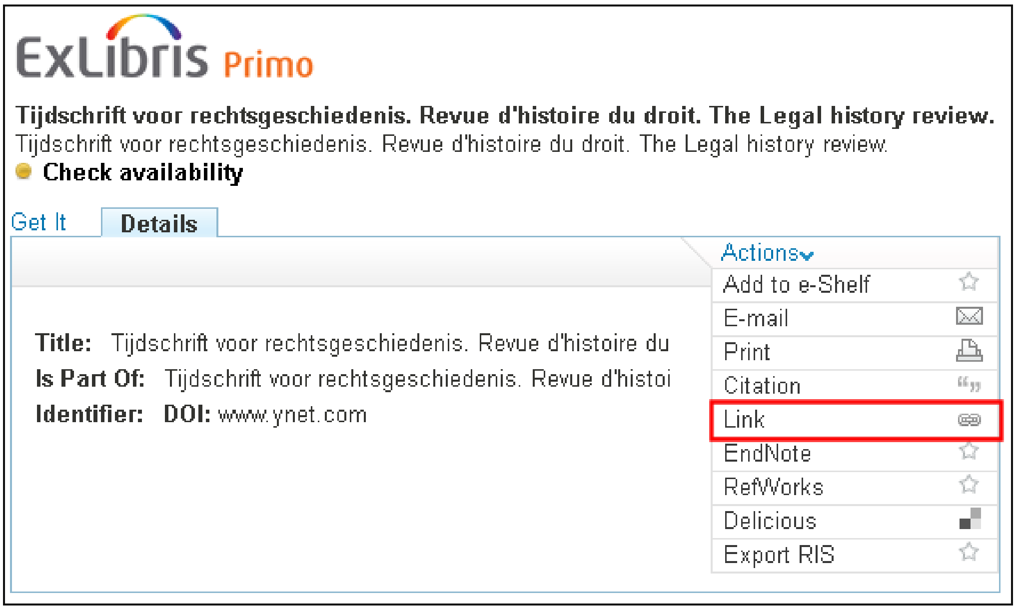


Figure 67: Link Action in Actions Drop-Down List

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.

Figure 68: Link OpenURL

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 16. Back Office Configurations

Table	Description
Keeping this item Tile code table	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: ■ `default.fulldisplay.label.Openurl.link` ■ `default.fulldisplay.command.link` ■ `default.link.title.commands.Openurl`
CSS	Out of the box, the Actions menu displays the Link option on the Alma Services page. You can disable this option by appending `{display: none;} to` the following line in your localized CSS file: `.EXLTabHeaderButtons ol.EXLTabHeaderButtonSendToList li.EXLButtonSendToOpenUrl` **`{display: none;}`**

6

Configuring Alma's Delivery System

This section includes:

Introduction

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.

The Primo View It Tab

The View It tab (which displays on the Services Page and during the discovery of local Alma records in Primo) allows end users to link to a resource or view it:

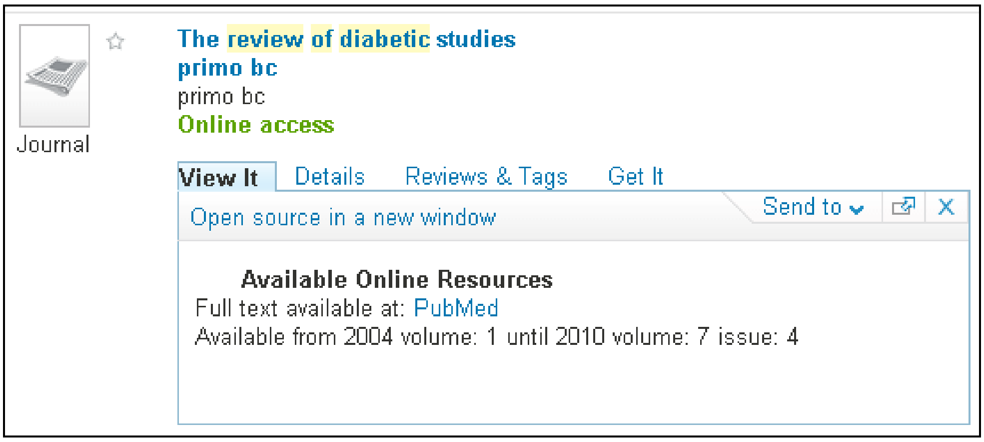


Figure 69: Example Electronic Resource

If configured, additional services may also display in the View It tab. For more information, see **Adding a General Electronic Service** on page **133**.

The Primo Get It Tab

The Get It tab (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

If the user belongs to an Alma Collaborative Network (CN), additional locations and services may be viewed by clicking the **More** link in the Get It tab. For more information, see **The More Link and Institutions Lightbox** on page **57**.

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

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.
- Availability information

For example:

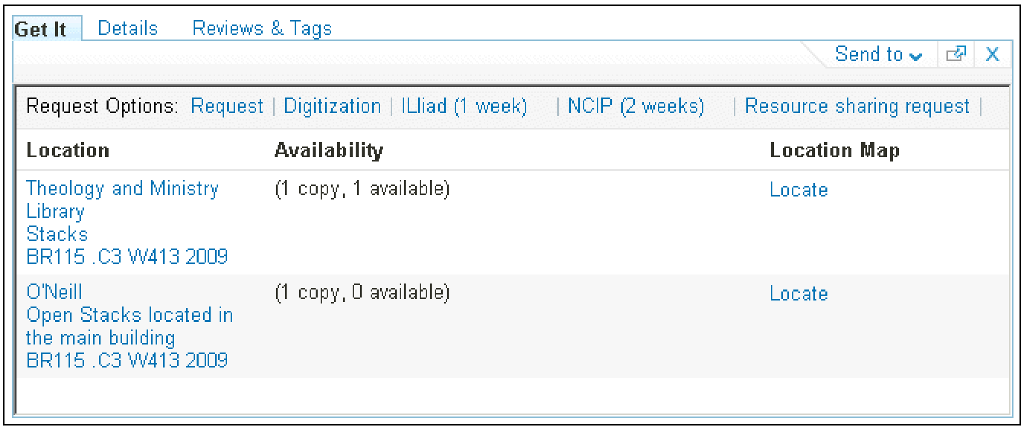


Figure 70: Get It Tab - Non-Serial Title with Multiple Locations

For serial titles, the following information is also included:

- Summary holdings statement (866 $$a)
- Public note (866 $$z)

NOTE:
The availability information is omitted for serials.

For example:

Figure 71: 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** in the *Alma Fulfillment Guide*.

Configuring the Sort Order of Physical Items

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

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

1 Open the Sort Routine List page (**Resource Management > Resource Configuration > Configuration Menu > General > Physical Item Sort Routines**).

2 Select **Actions > Edit** in the row that contains the sort routine that you want to use for the Get It tab in Primo.

3 Click the **Display Configuration** tab.

4 Select the **Resource management Get it results** parameter and its associated **Set as default** parameter.

5 Click **Save**.

Items List

Users can view the items that are related to a specific holdings record by clicking the holdings entry in the Get It tab. After an entry has been clicked, 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 not signed in, the system displays **Loanable** if there is at least one rule that has a loanable policy.
- Description – Displays only for items that have a Description field.
- Item status

For example:

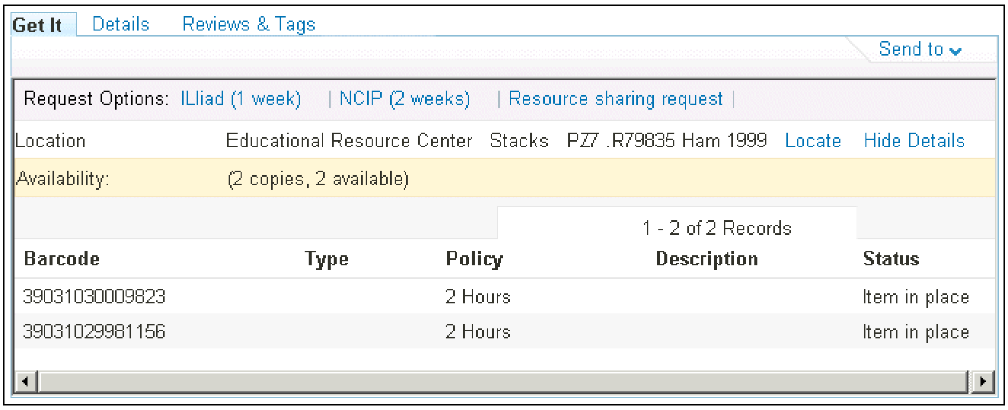


Figure 72: Get It Tab - Displaying Item-Level Information for Non-Serials

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**.

For example:

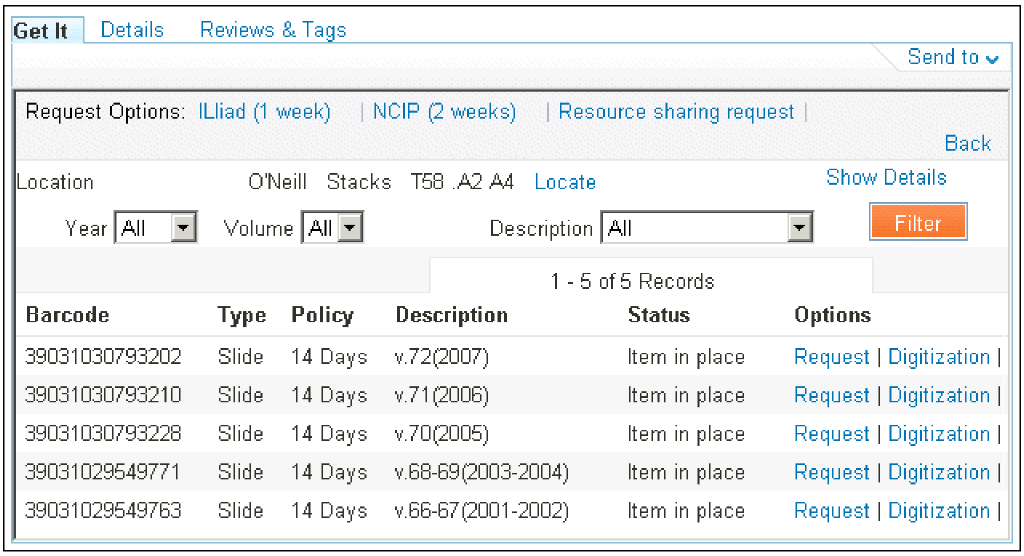


Figure 73: Get It Tab - Displaying Item-Level Information for Serials

Request Options

The Get It tab 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:

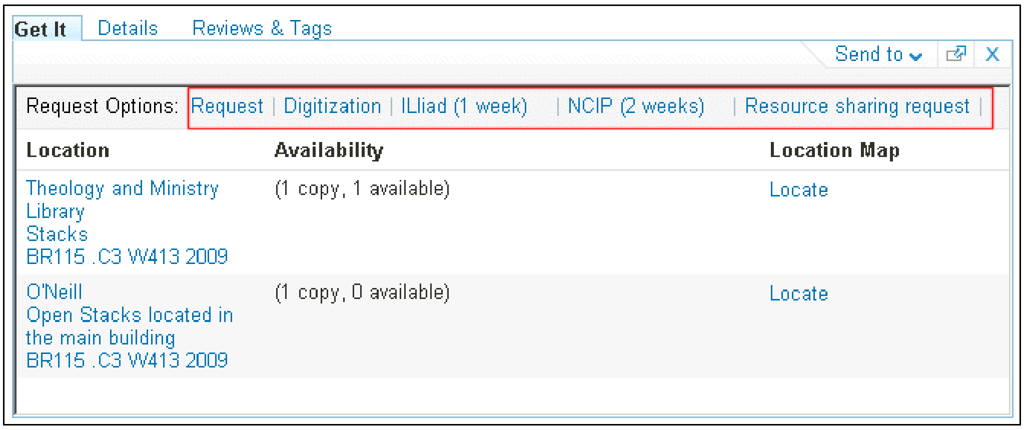


Figure 74: Get It Tab - Request Options in the Holdings List

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** in the *Alma Fulfillment Guide*).
- The resource sharing library has a **Deliver To** relationship with a library that has a defined hold shelf (for details, see **Configuring Fulfillment Relationships** in the *Alma Fulfillment Guide*).

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

For serial titles, users must perform requests at the item level. For example:

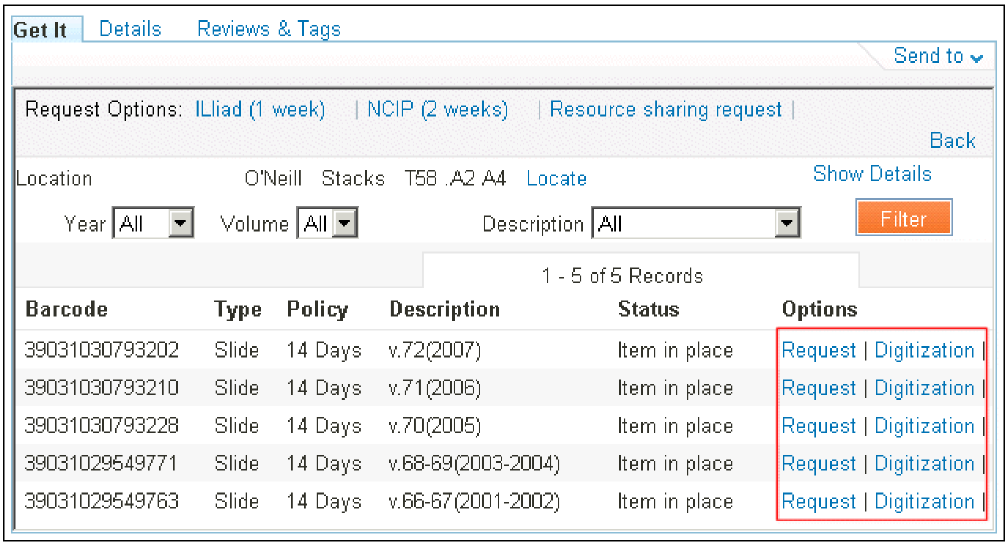


Figure 75: Get It Tab - Request Options in the Items List for Serials

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 – see **Modifying Display Logic Rules** on page **113**
- Labels used for various display fields – see **Modifying Display Labels** on page **114**
- Resource sharing library – see **Configuring the Resource Sharing Library** on page **116**
- Look of the Get It tab – see **Branding the Delivery Tabs** on page **119**
- Miscellaneous information such as how to define location map links – see **Configuring the Delivery Tabs** on page **125**

For information on configuring the request options, refer to the *Alma Fulfillment Guide*.

Modifying Display Logic Rules

Alma allows you to configure the behavior of the delivery tabs, such as hiding full-text service from a particular user group. You can add these display rules on the Display Logic Rules page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic**).

For more information, see **Configuring Display Logic Rules** in the *Alma Fulfillment Guide*.

Modifying Display Labels

Alma allows you to configure the labels (such as item statuses, process types, and so forth) that display in the delivery tabs, using the Discovery Interface Labels page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Labels**).

For more information, see **Configuring Labels** in the *Alma Fulfillment Guide*.

Configuring Related Records for Display in Primo

Alma allows you to configure the display of records that are related to electronic records returned in the Primo View It tab, using the Related Record Services Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Related Records**).

For more information, see **Configuring Services for Related Records** in the *Alma Fulfillment Guide*.

Resolving Electronic Resources in the Network Zone

Alma link resolving functionality also provides electronic services for electronic resources that are managed centrally in the Network Zone (NZ).

An institution working in a collaborative network environment can configure the Alma Link Resolver to resolve context-sensitive services for resources that are managed in the NZ and available for the institution. When this configuration is in place, any Open URL request to the Alma Link Resolver consults the NZ to resolve electronic services that are available for the institution. The electronic services are presented in the View It tab of the Alma Link Resolver's services page.

The figures below illustrate an example in which an electronic resource is available only in the NZ and not as part of an institution's own inventory.

Figure 76: E-Resource Available only in Network Zone

An Open URL request to the Alma Link Resolver consults the NZ to resolve the electronic services that are available for the institution and displays these services in the View It tab. For example, the figures below show a search within the Citation Linker for an electronic resource entitled "The Defender of Peace." The e-services available for this resource are resolved via the NZ and displayed in the View It tab.

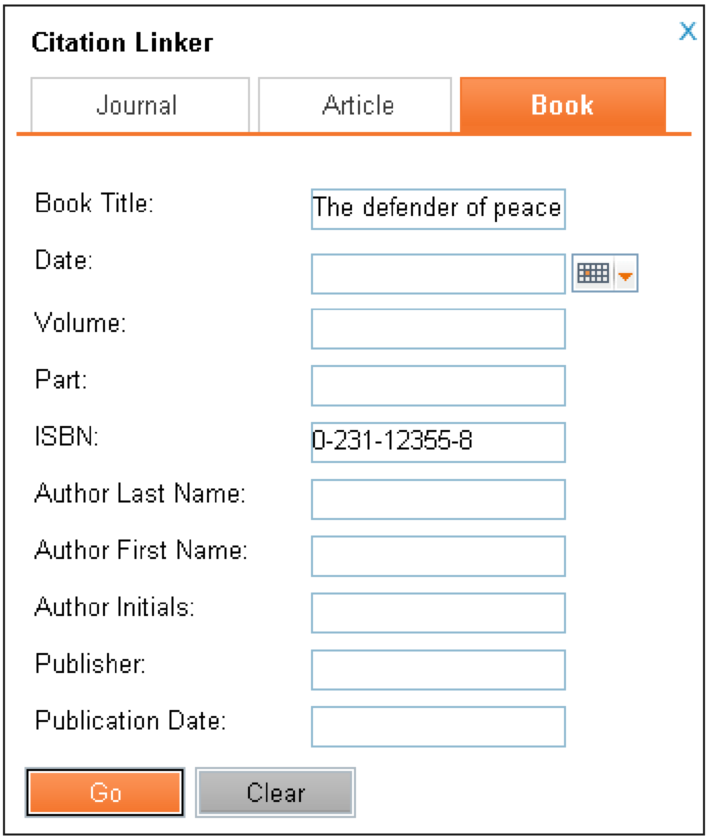


Figure 77: Search for E-Resource in the Member Institution

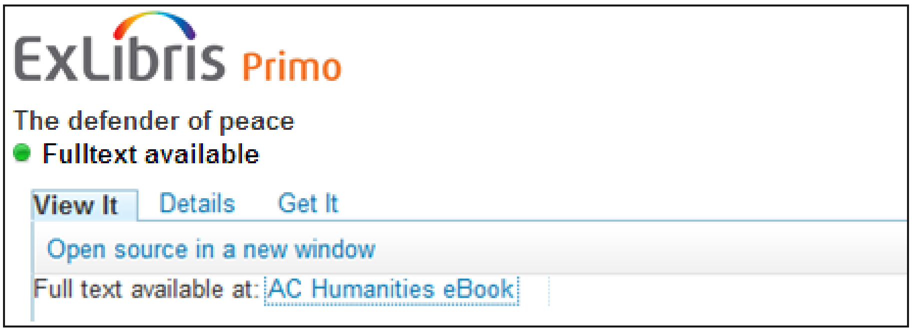


Figure 78: Electronic Services Displayed in the View It Tab

PERMISSIONS:

The following role can configure this new functionality:

- General System Administrator

NOTE:

The Ex Libris Implementation Consultant typically sets this configuration for a consortium prior to delivery.

To resolve electronic services for resources that are managed in the NZ:

1. On the General Configuration page (**General > General Configuration > Configuration Menu**), click **Other Settings** under **General Configuration**.
2. Change the value of the **retrieve_services_from_NZ** parameter to **true**.

Configuring the Resource Sharing Library

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 **Table 2** in the *Alma Administration Guide*).
- Ensure that the **ill_item_creation_lib_code** setting on the Customer Parameters Mapping Table is set to **ALL** (see **Configuring Other Settings** in the *Alma Fulfillment Guide*).

To select from mulitple resource sharing libraries:

1 Perform a search for an item in Primo, and click the Get It link for a result. The Get It tab page opens.

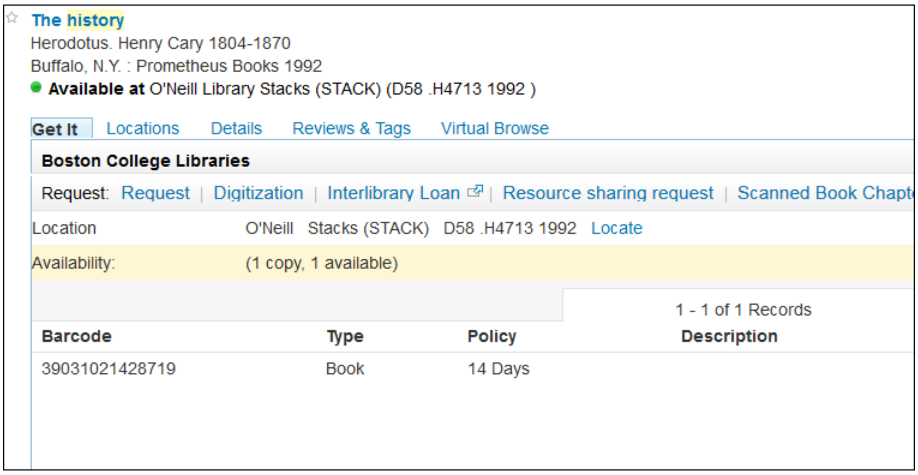


Figure 79: Primo Get It Tab

2 Click the **Resource Sharing Request** link. The page refreshes.

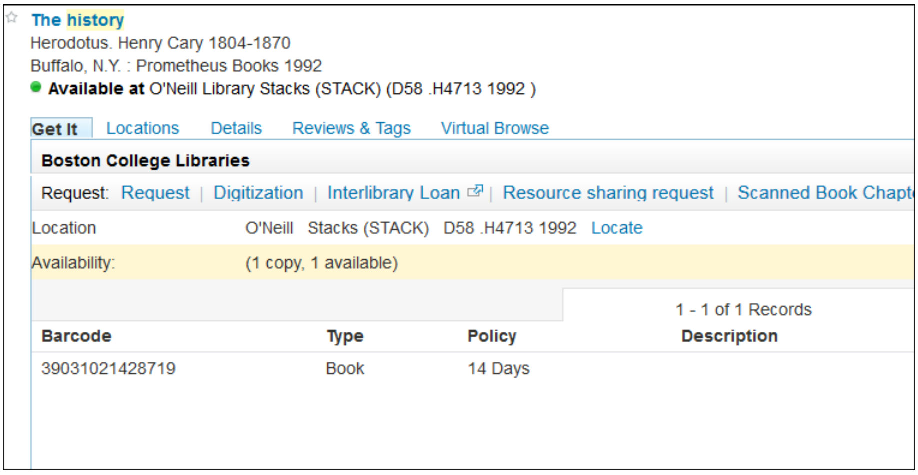


Figure 80: Primo Get It Tab – Multiple Resource Sharing Libraries

3 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** in the *Alma Fulfillment Guide*), and/or those for which the patron's TOU are enabled.

4 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.

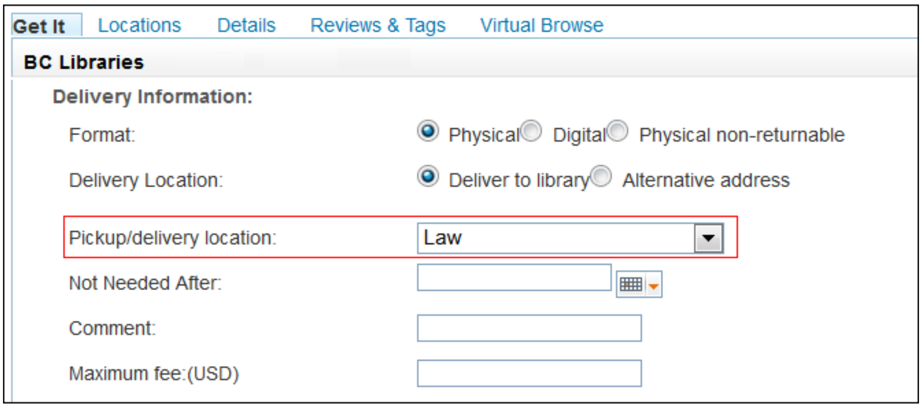


Figure 81: Primo Get It Tab – Pickup/Delivery Location Field

The values in the **Pickup/delivery location** drop-down depend on the values selected in the **For library** field in the previous step.

Configuring Best Location

Alma determines the location display priority primarily by availability. Holdings with the greatest number of available items are displayed first (which cannot be configured). In addition, Alma allows you to give preference to locations that match the IP address of the patron's IP address. These locations will include the AVA $$P field. For more information, see **Collaborative Network Support** on page 56.

To configure the best location preference:

1 On the Fulfillment Configuration page (**Fulfilment > Fulfillment Configuration > Configuration Menu**), click **Locations Ordering Profile**

under **Discovery Interface Display Logic** to display the Locations Ordering Profile page.

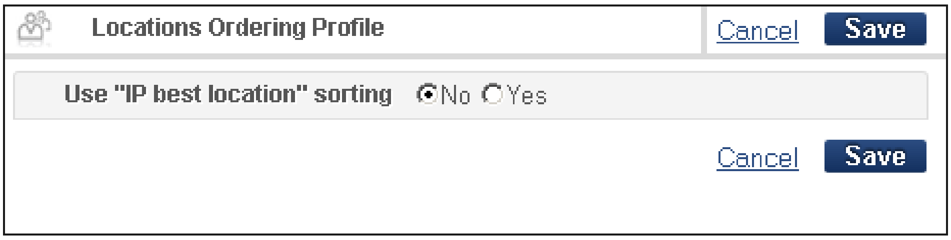


Figure 82: Locations Ordering Profile Page

2 Select **Yes** for the **Use "IP best location" sorting** field.

3 Click **Save**.

Branding the Delivery Tabs

Alma uses the following CSS files to define the look and feel of the View It and Get It tabs and the Alma Resolver Electronic Services page:

- `otb_mashup.css` – This file was added to define the out-of-the-box look and feel for the Primo View It and Get It tabs and the Alma Resolver Electronic Services page and cannot be modified. The system automatically loads this file first for all skins.
- `calendar.css` – This file defines the classes associated with the existing calendar component. You may update the classes as needed in this file.
- `mashup.css` – For new skins, this file contains the same classes defined in the `otb_mashup.css` file, but each class is commented out. Classes that are modified and not commented in this file override the respective class definitions in the `otb_mashup.css` file.

Alma allows you to modify the CSS (and associated image files) that the system uses for the delivery tabs by uploading a customized CSS. The Add a Skin page allows you download a Zip file that contains the default skins used for the delivery screens (see **Creating a New Skin** on page **120**). By examining the contents of the default CSS, you can determine which elements you want to customize.

Figure 83: Add a Skin Page

Creating a New Skin

The Add a Skin page allows you to create new skins, as well as modify exiting skins (see **Modifying a Skin** on page **123**). 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 will continue to use default skin for the delivery screens.

To create a customized skin:

1. On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Delivery System Skins** under **Branding/Logo** to display the Manage Skins page.

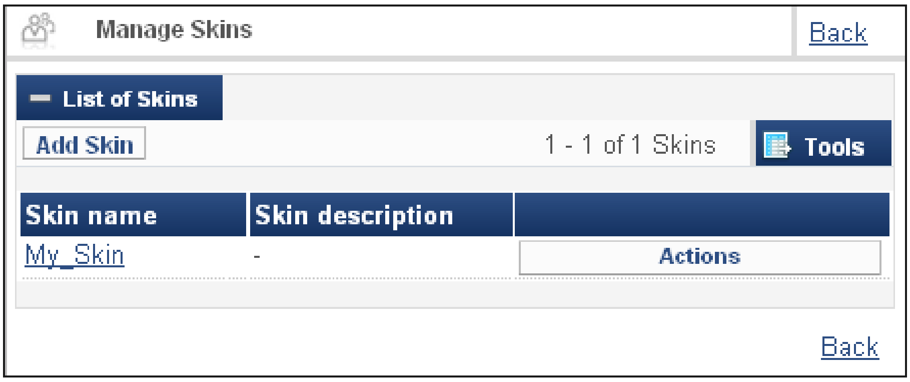


Figure 84: Manage Skins Page

2. Click **Add Skin** to display the Add a Skin page.

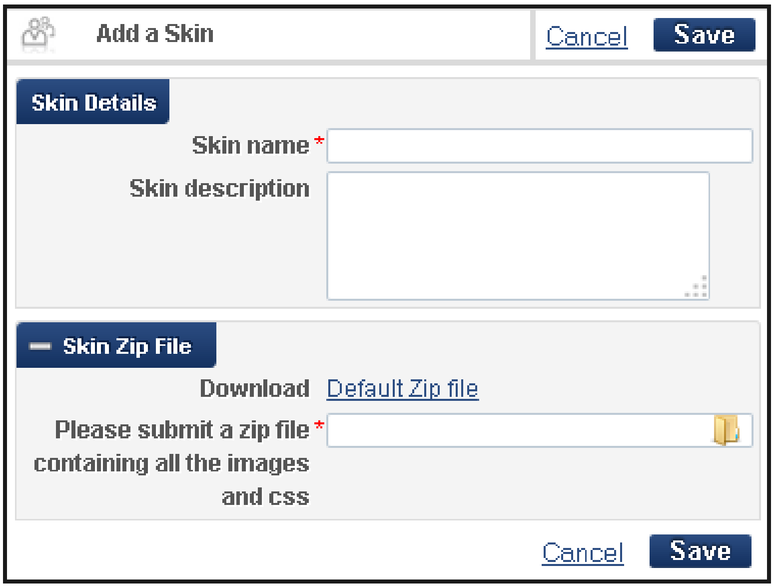


Figure 85: Add a Skin Page

3. In the **Skin Details** section, specify a unique name for the skin and an optional description.
4. In the **Skin Zip File** section, click 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.

IMPORTANT:
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:

```
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 new Zip file in the **Please submit a zip** field.
8. Click **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:
If this parameter is not included, Alma will use the default skin.

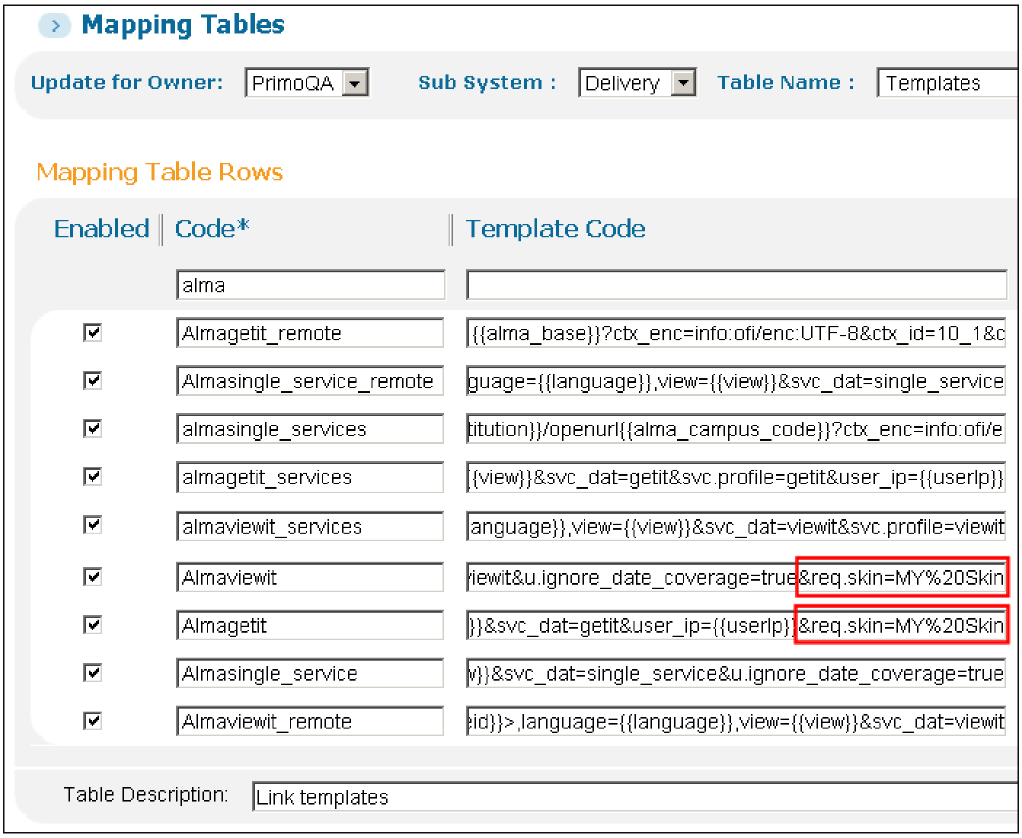


Figure 86: Templates Mapping Table

10 Save and deploy your changes in Primo.

Modifying a Skin

The Add a Skin page allows you to modify skins, as well as create new skins (see **Creating a New Skin** on page 120). 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:

1 On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Delivery System Skins** under **Branding/Logo** to display the Manage Skins page.

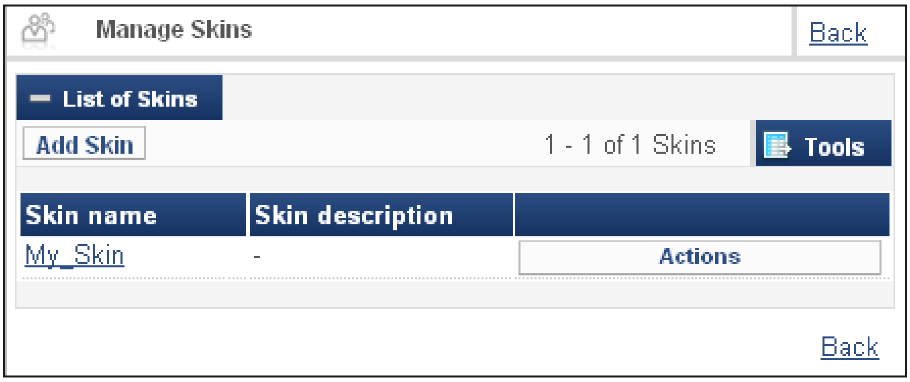


Figure 87: Manage Skins Page

2 Select **Actions > Edit** in the row containing the skin you want to modify.

The Add a Skin page opens.

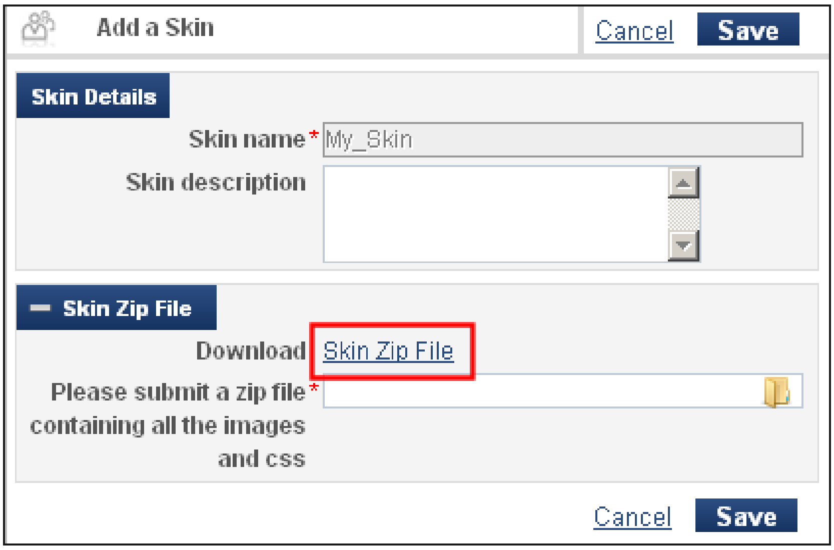


Figure 88: Download Existing Skin

3 In the **Skin Zip File** section, click 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.

IMPORTANT:
You must retain the original structure of the default 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:

```
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.

5. Put the CSS and image files into a Zip file, keeping the original structure of the default Zip file.
6. In the **Skin Zip File** section, search for and select the modified Zip file in the **Please submit a zip** field.
7. Click **Save**.

Configuring the Delivery Tabs

In addition to the CSS, you can also control the following aspect of the delivery tabs:

- **Define URL template for the location map link** – You can define the template that is used for the location map link in the Get It tab.

To define the location map link template in Alma

1. On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Integration Profiles** under **External Systems** to open the Integration Profile List page.
2. Click the **Add Integration Profile** button to open the External System page.

3 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.

4 Click **Next**.

5 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 location of the template.`
- **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 library, select the locations in the drop-down list.

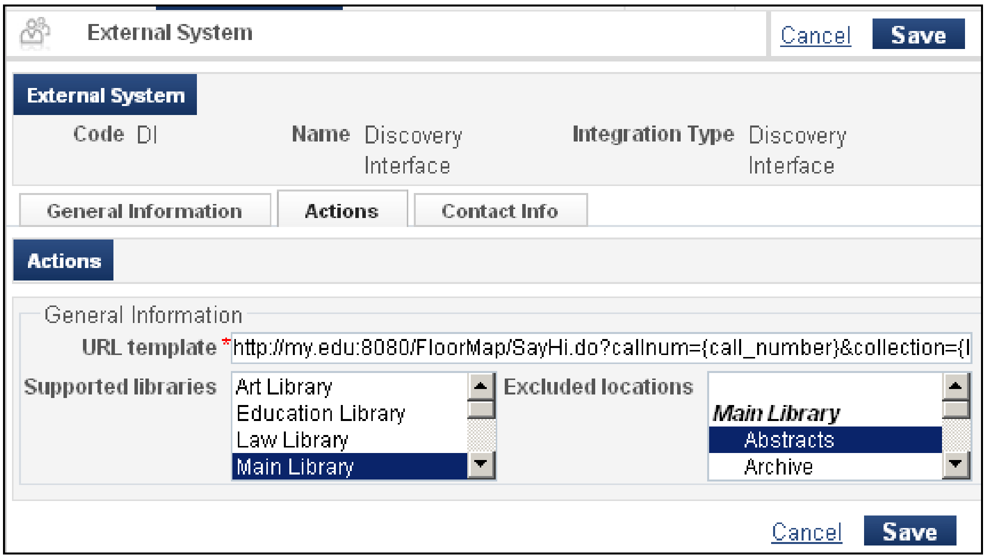


Figure 89: Discovery Interface Integration Profile

- **display_viewit_target_in_new_window** – This parameter indicates whether the targets in the View It tab open in a new dialog box.

  To access this parameter, on the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Other Settings** under **General Configuration** to open the Customer Parameters page.

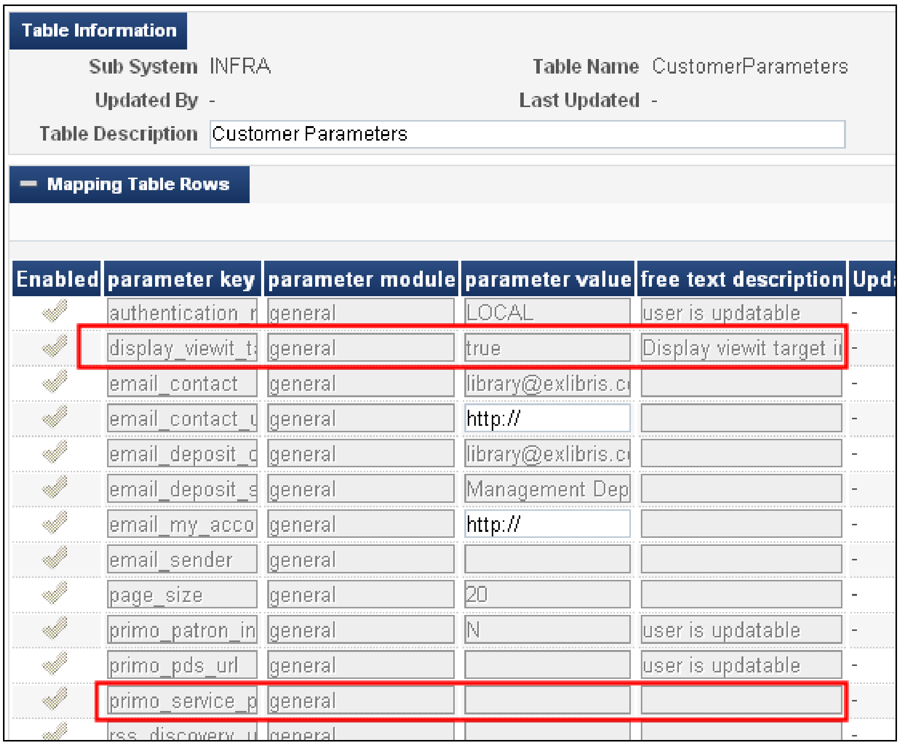


Figure 90: General Configuration - Customer Parameters

- **primo_service_page_url** – This parameter configures the base URL that is used to receive a service page direct link to the title when using the Alma Course Information Web service. The parameter should contain the base URL of the Services Page view ID (vid) that is defined in Primo. For example:

  ```
  http://bc-primo.hosted.exlibrisgroup.com/openurl/BCL/
  services_page?dscnt=1&vid=services_page
  ```

  To access this parameter, on the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Other Settings** under **General Configuration** to open the Customer Parameters page.

Adding Primo's Search Box to the Alma Home Page

Alma allows you to 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. In addition, this dashboard provides high-level information regarding the last publish-to-Primo job.

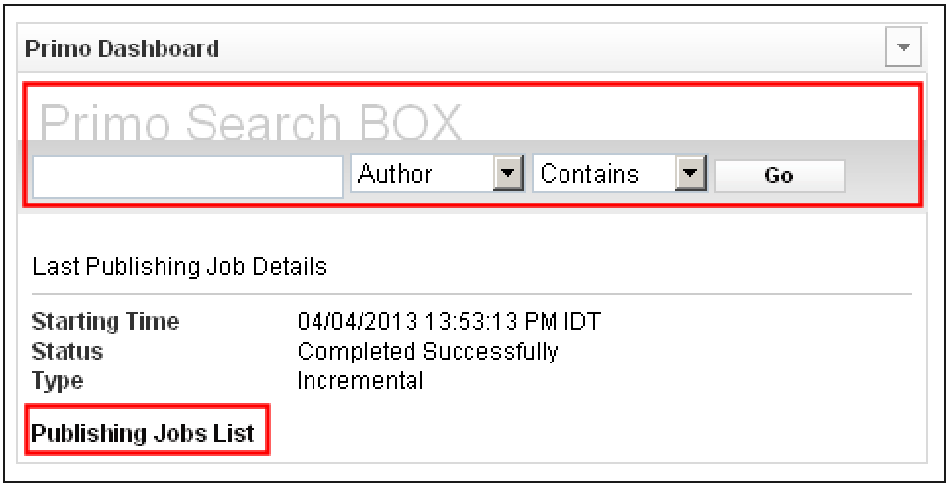


Figure 91: Primo Dashboard

PERMISSIONS:

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. On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Primo Widget Search Fields** under **Widgets** to open the Primo Widget Search Fields page.

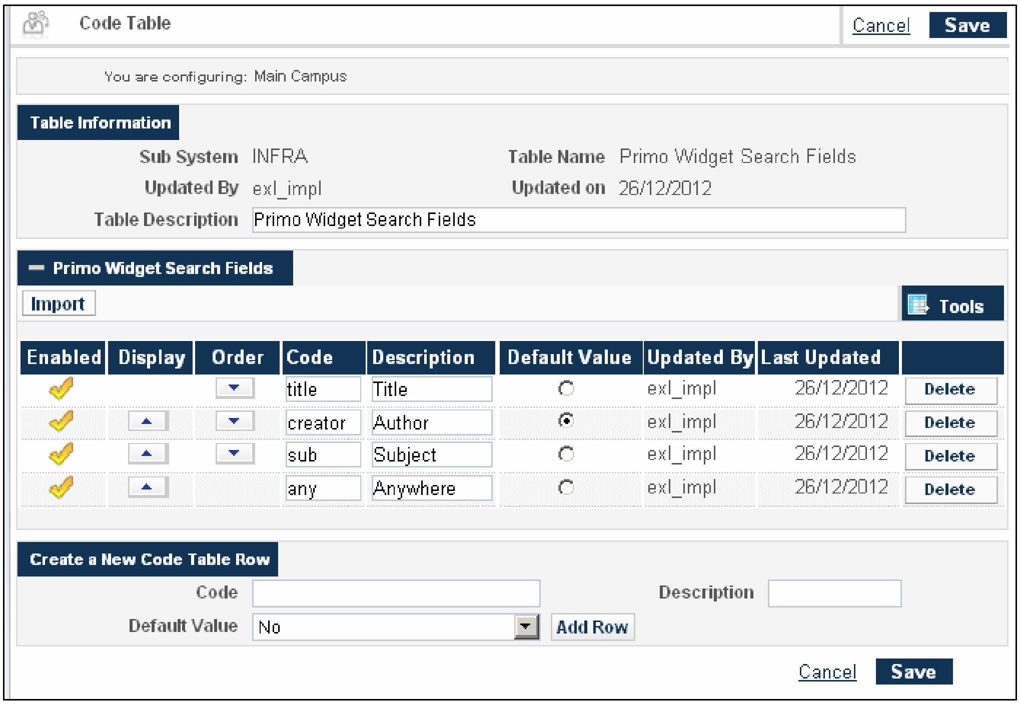


Figure 92: Primo Widget Search Fields Page

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 click **Save**.
3. On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Primo Widget Search Precision** under **Widgets** to open the Primo Widget Search Precision page.

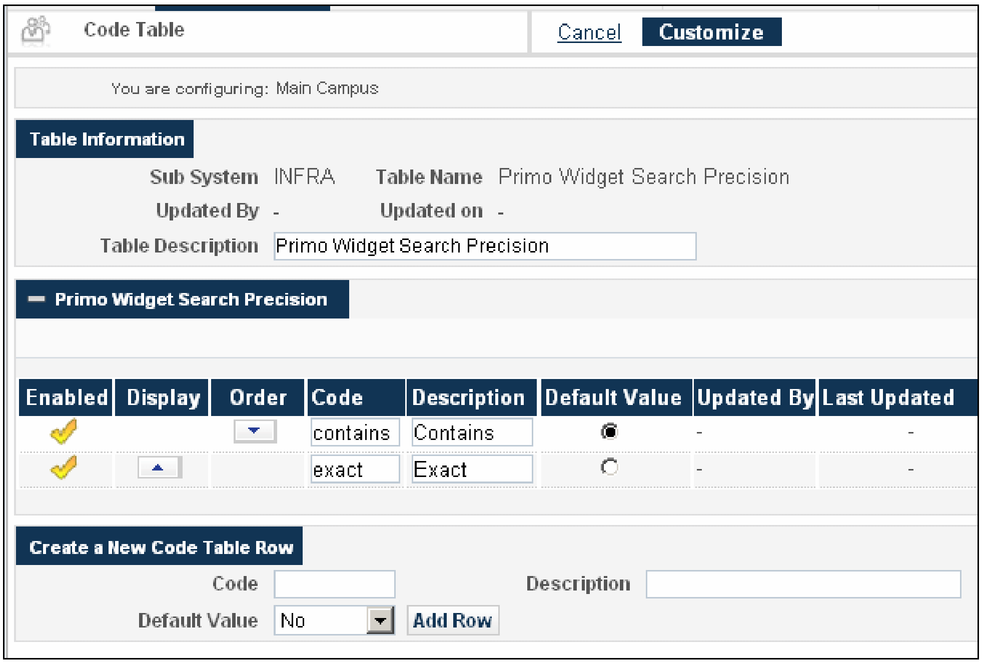


Figure 93: Primo Widget Search Precision Page

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

5 On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Primo Widget Configuration** under **Widgets** to open the Primo Widget Configuration page.

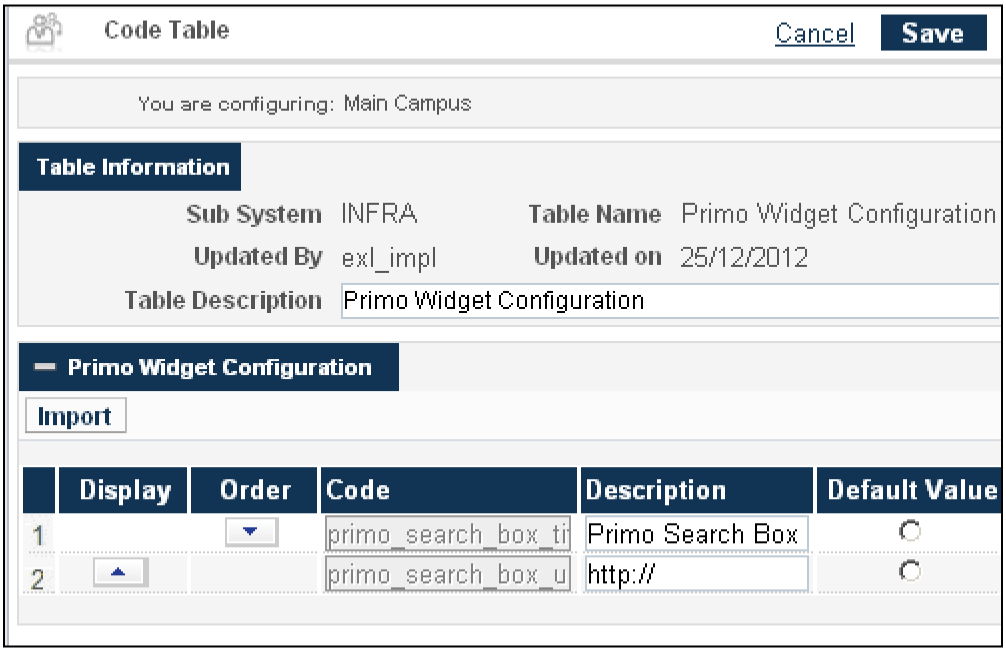


Figure 94: Primo Widget Configuration Page

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

The **primo_search_box_url** parameter is required in order 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 instructions regarding how to format the URL, refer to the following page on EL Commons:

http://exlibrisgroup.org/display/PrimoOI/Brief+Search+%28Deep+Link%29

Format the URL in the following manner:

```
http://<host[:port]>/primo_library/libweb/action/
dlSearch.do? <parametersList>
```

The following is an example of a valid URL:

```
http://Myprimo17:1702/primo_library/libweb/action/
dlSearch.do?institution=PRIMO&vid=Auto1&onCampus=false&
indx=1&bulkSize=5&dym=true&highlight=true&lang=eng&
group=GUEST&displayField=creator
```

NOTES:

- There are mandatory parameters such as **institution**, **vid**, **onCampus**, **indx**, and **bulkSize** that must be configured.
- The **query** parameter should not be configured in the URL. Alma adds the **query** parameter when searching using the widget. The components of the parameter are taken from the search value and the drop-down values.

7 If the Primo Dashboard does not display on the Alma Home Page, click the **Add Widget** button on the Alma Home Page.

The Add Widget Lightbox opens.

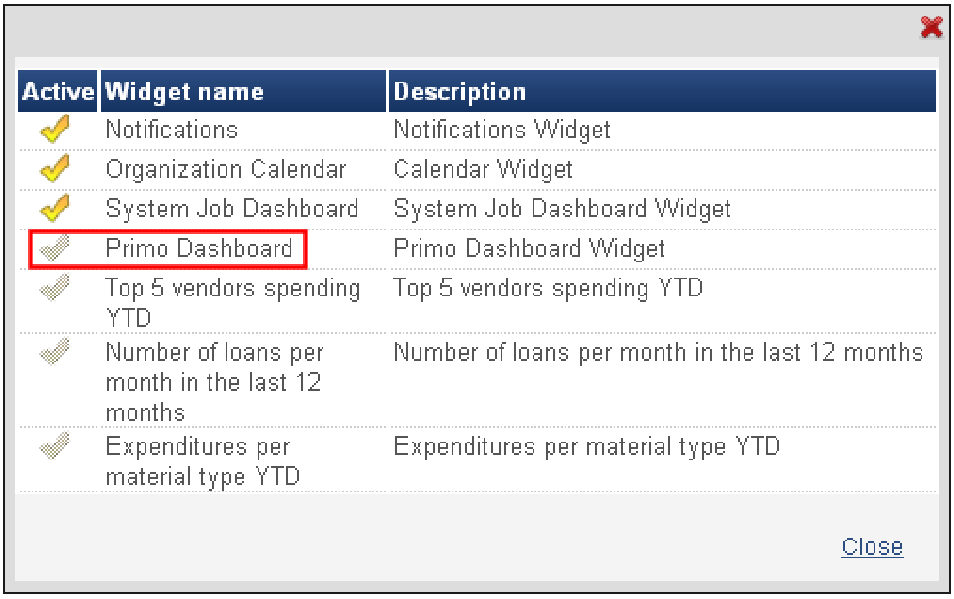


Figure 95: Add Widget Lightbox

8 Select the row containing the Primo Dashboard widget and click **Close**. A yellow check mark indicates that a dashboard has been selected.

Adding a General Electronic Service

In addition to services found in your own collection (such as full text, requests, and so forth), Alma allows you to define general HTTP services (such as searches in ProQuest dissertations and Amazon, Ask a Librarian, and so forth) that may be presented to patrons in the Primo View It and Get It tabs.

Figure 96: Electronic Service Example (View It Display)

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 needed 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 displays in the View It and/or Get It tabs.

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

- Specify service order – see **Configuring General Electronic Services Order** on page **415**
- Define display logic rules – see **Configuring Display Logic Rules** on page **397**

To configure general electronic services in Alma:

1. From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
2. From the Discovery Interface Display Logic section, click **General Electronic Services**.
3. Click **Add Service**. The Add Service dialog box opens.

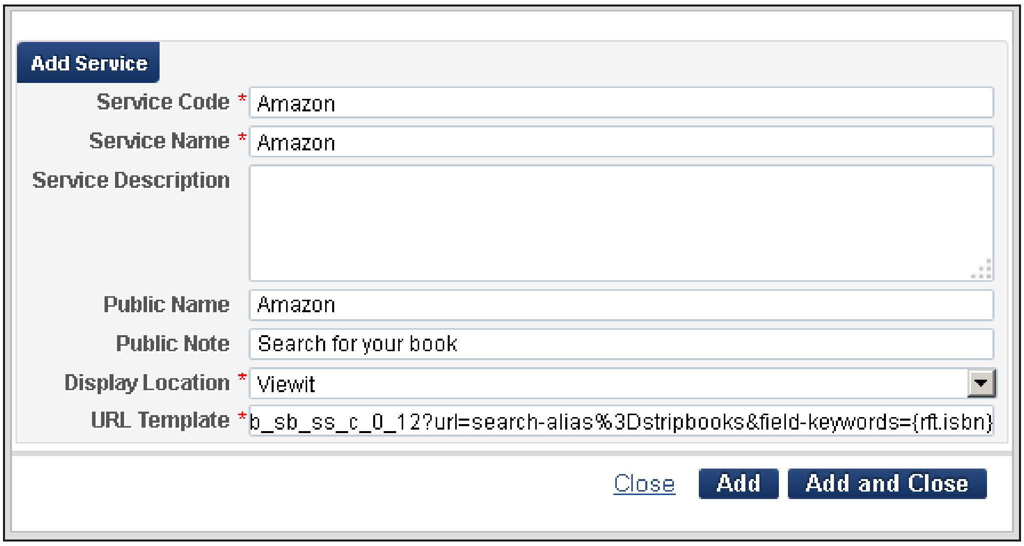


Figure 97: Add Service Dialog Box

4 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 the Primo View It and/or Get It tabs.
- **Public Note** – The note or description of the service that displays below the link in the Primo View It and/or Get It tabs.
- **Display Location** – The Primo tabs in which the link displays: **None**, **Getit**, **Viewit**, or **Getit & viewit**.
- The **URL Template** – The URL where the patron is redirected when the external service link is clicked.

  The example identified in this procedure defines an Amazon search for a specified ISBN (which is taken from the OpenURL context object retrieved by Alma's link resolver). The complete URL for the **URL Template** option is:

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

5 Click **Add and Close**.

The new service displays on the General Electronic Service page with the following action options: **Remove** and **Edit**.

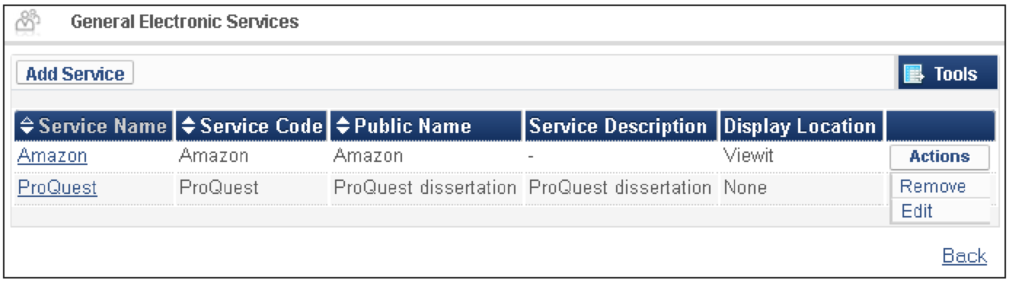


Figure 98: Electronic Service Added

6 Click **Actions > Edit** to configure additional service details.

The Service Details page opens.

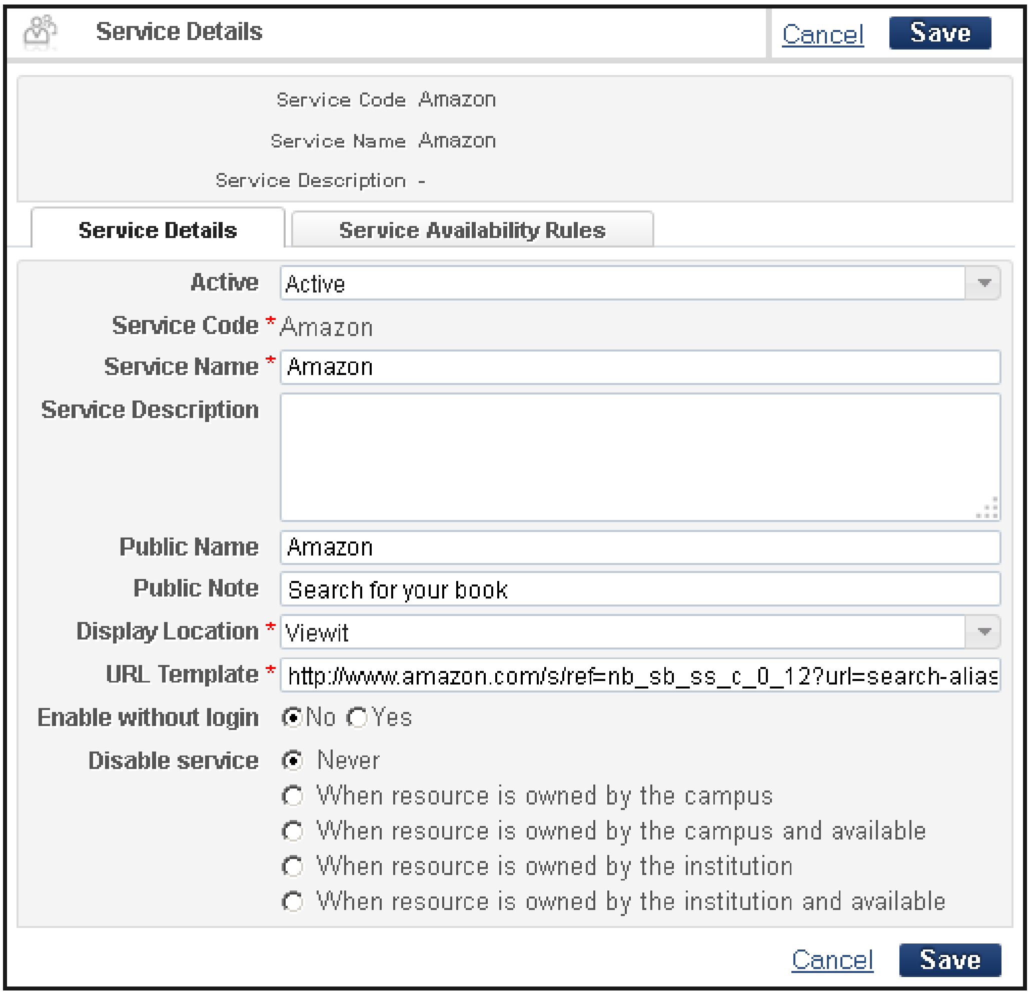


Figure 99: Service Details Page (Service Details Tab)

7 If you want to display this service to signed-in users only, select **No** in the **Enable without login** field.

8 To display this service based on the availability of the physical resource in the institutional repository, select one of the following options:

- **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:
When a guest user or a user without a configured campus performs any of the campus-level disabling activities, Alma disables/hides the service based on a self-ownership check done at the institution level.

9 Click the **Service Availability Rules** tab.

The Service Availability Rules tab displays all of the rules that the system uses to determine whether a service should display 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**). Click **Edit** to modify the default rule for the service.

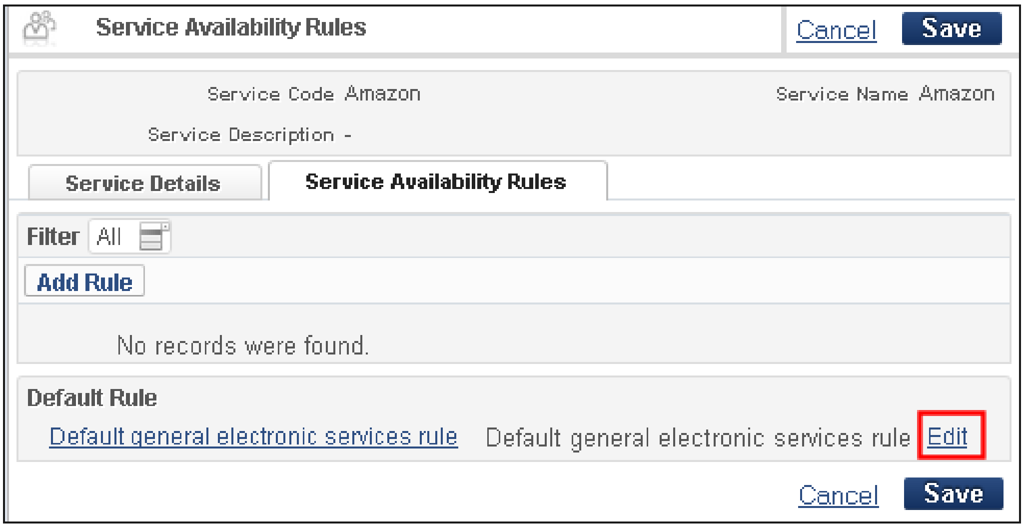


Figure 100: Service Availability Rules Tab

10 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. Information on them is available at: http://www.niso.org/apps/group_public/project/details.php?project_id=82

For example, to add a rule to the Amazon service to indicate that an ISBN must be returned in the OpenURL context object in order to display the service in the Primo View It and/or Get It tabs:

a Click **Add Rule**. The Edit Rule page opens.

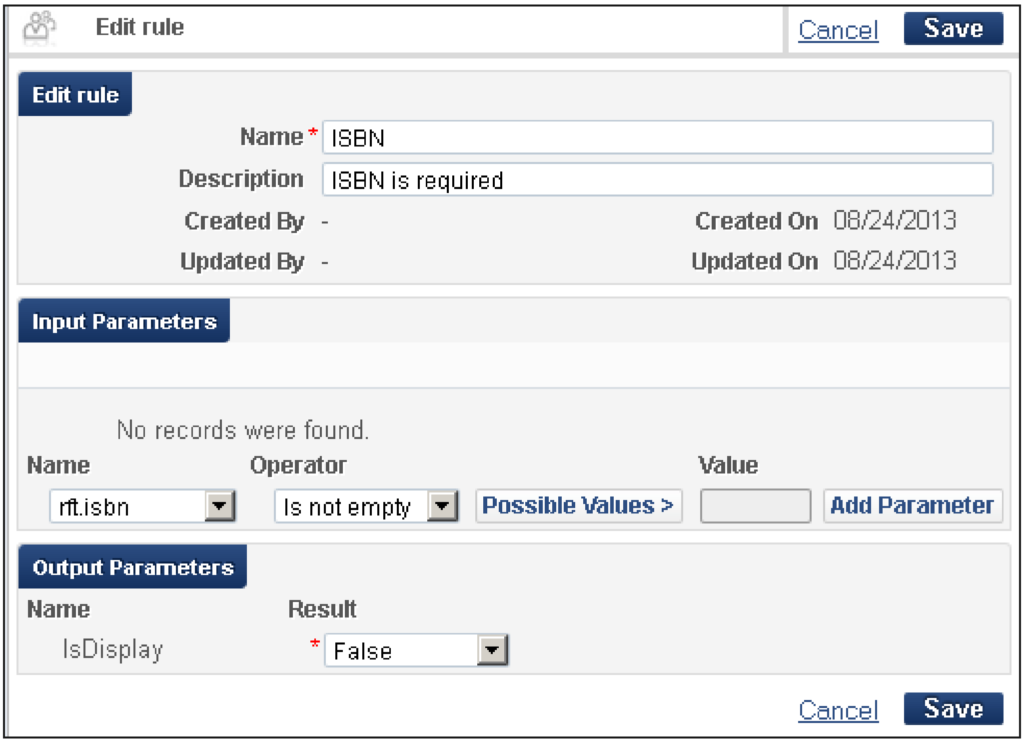


Figure 101: Edit Rule Page

b In the **Edit Rule** section, enter the rule name (required) and description (optional).

c In the **Input Parameters** section, enter the following fields:

- **Name** – The name of the attribute in the OpenURL context object. For more information about these attributes, see the OpenURL Standard (versions 0.1 and 1.0, http://www.niso.org/apps/group_public/project/details.php?project_id=82).

  For the Amazon example, the **rft.isbn** attribute has been selected.

- **Operator** – The comparison operator to use with this context object attribute. For the Amazon example, the **Is not empty** operator has been selected to make sure that the Amazon search contains an ISBN.

- **Possible Values** – The accepted values for this parameter. Note that all operators do not require a value.

d Click **Add Parameter**. The parameter is added to the list.

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

The completed input and output parameters display as in the figure below.

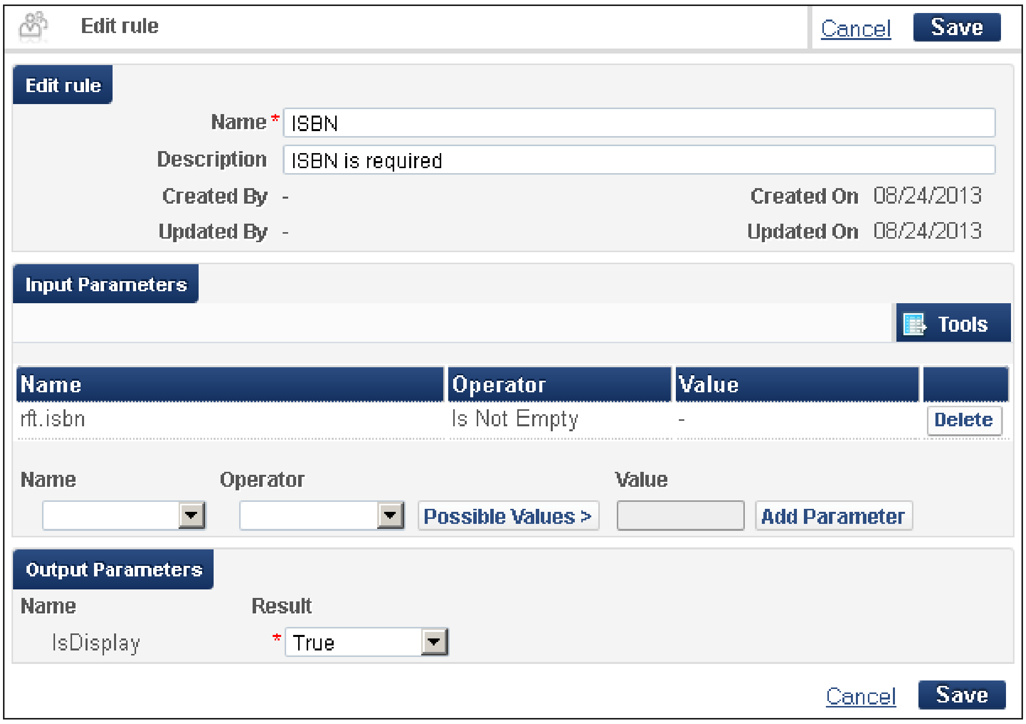


Figure 102: Amazon Input/Output Parameters Entered

f Click **Save**. The Service Availability Rules page displays the new rule.

11 Click **Save**. The General Electronic Services page displays the new service.

Configuring the WPM Education E-Payment System in Alma

The WPM Education E-Payment System allows Alma users to pay fines and fees via My Account in Primo. Once the request is initiated in Primo and processed in the payment system and Alma, both Alma and the WPM Education E-Payment System send payment receipt emails to the user.

The WPM Education E-Payment System must first be configured in Alma to enable online payments. In addition, some configuration may be necessary in Primo.

PERMISSIONS:

The following role is needed to configure the WPM Education E-Payment System:

- General System Administrator

To configure the WPM Education E-Payment System in Alma:

1 On the General Configuration page (**General > General Configuration > Configuration Menu**), click **Integration Profiles** under **External Systems**. The Integration Profile List page opens.

2 Click the **Add Integration Profile** button. The first page of the External System wizard opens.

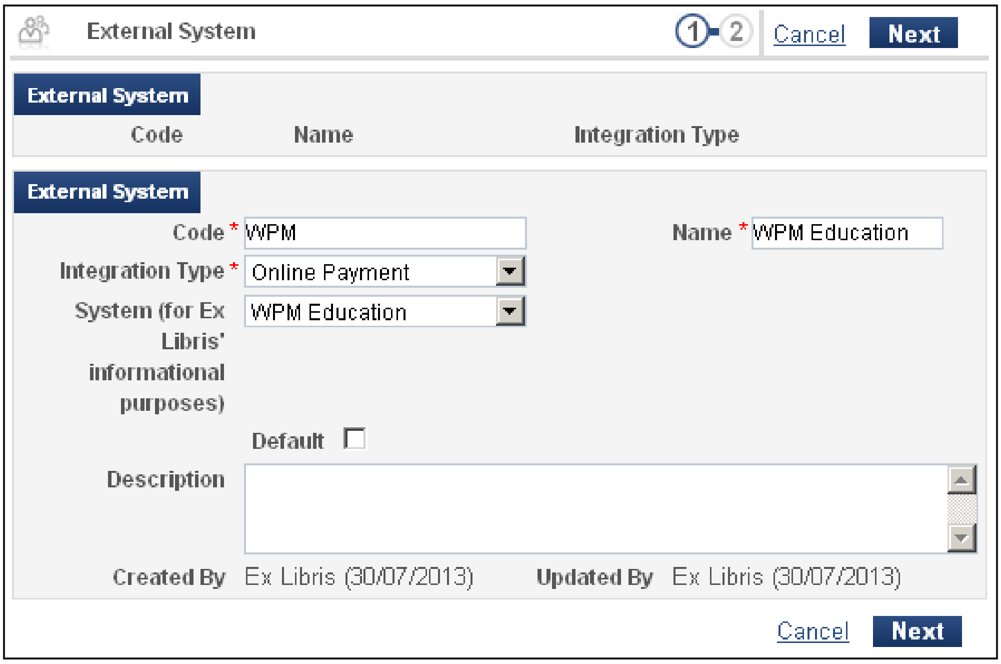


Figure 103: External System Page 1

3 Perform the following actions on this page:

a Enter a code and name for the WPM Education E-Payment system.

b From the **Integration type** drop-down list, select **Online Payment**.

c Select **WPM Education** from the **System** drop-down list.

d Click **Next**.

The External System - Actions Section opens.

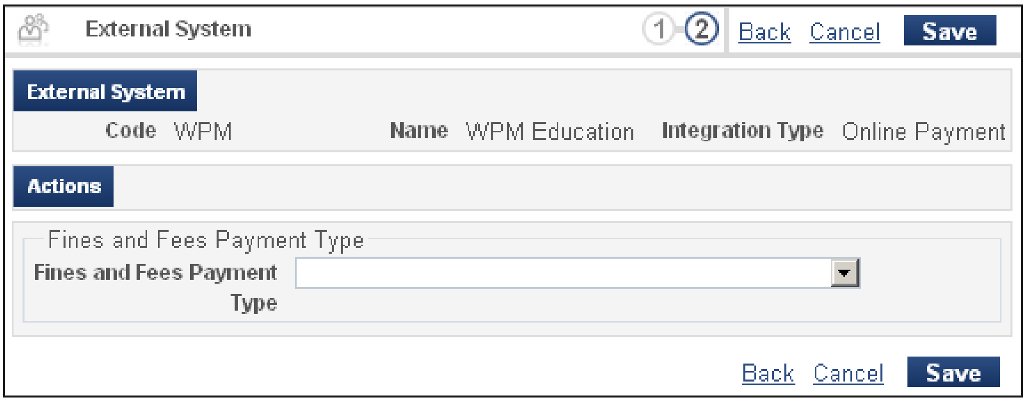


Figure 104: External System Page 2 - Actions Section

e Select **WPM Education** from the **Fines and Fees Payment Type** drop-down list.

The WPM Education Definitions subsection appears in the Actions section.

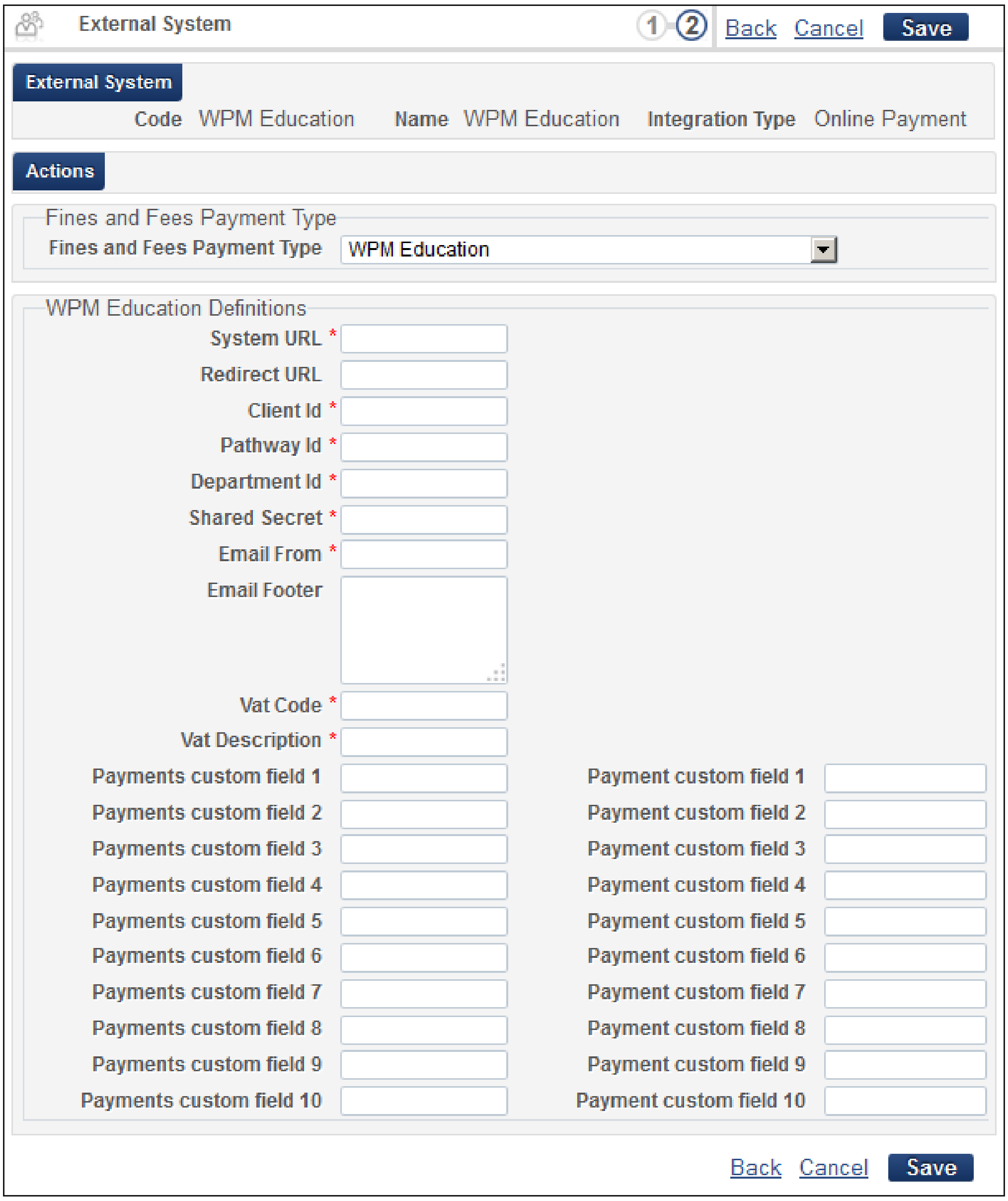


Figure 105: External System Page 2 - WPM Education Definitions

4 Enter the required fields on this page. Much of this information is specific to your institution and must be provided by the online payment system provider.

The **Redirect URL** field allows the online payment system to redirect the patron to the specified URL after the transaction has completed.

5 Click **Save**.

Displaying Historical Loans in Primo

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 CustomerParameters mapping table page in Alma (General > General Configuration > General Configuration > Other Settings).

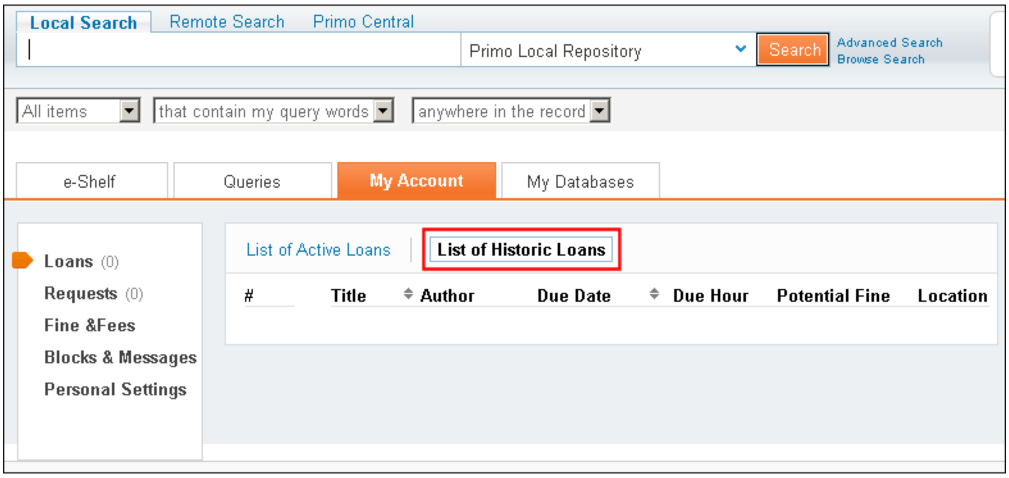


Figure 106: List of Historical Loans

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

NOTE:

Make sure that historical loans are tracked in Alma by setting the **should_anonymize_item_loan** parameter to **false** in the CustomerParameters mapping table page in Alma (Fulfillment > Fulfillment Configuration > General Configuration > Other Settings).

Displaying License Information in the View It Tab

Alma allows you to display an online resource's license information in the View It tab. The displayed terms of the license can be configured in Alma, as well as the license-related labels that display in the View It tab.

Figure 107: Show License Link in View It Tab

After the user clicks the **Show license** link, the name of the link changes to **Hide license**, and the license information appears as configured in Alma:

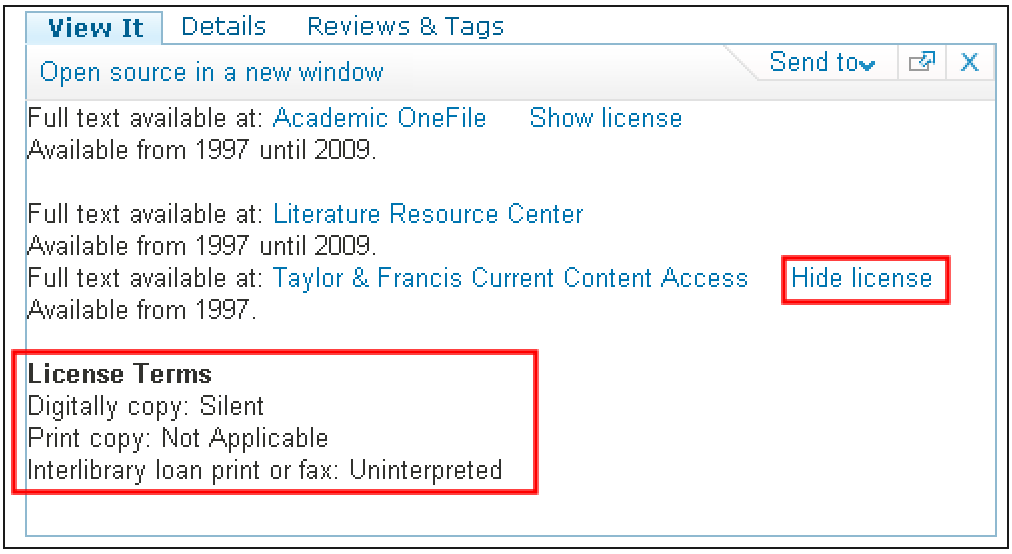


Figure 108: License Terms Displayed in View It Tab

VIDEO:

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

PERMISSIONS:

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 the View It tab:

1. Specify which license terms to display in the View It tab. For information on the **Display to Public** field, see **Adding a Term Type Definition** in the *Alma Acquisitions Guide*.
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** in the *Alma Fulfillment Guide*.
3. On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Other Settings** under **Discovery Interface Display Logic**.

   The Other Settings page opens.

Figure 109: Other Settings Page under Fulfillment Configuration

4. Select the **Enable display of license information** check box.
5. Click **Save**.

Displaying Public Notes in the Primo Get It Tab

Primo displays public notes as follows in the Get It tab:

- 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.

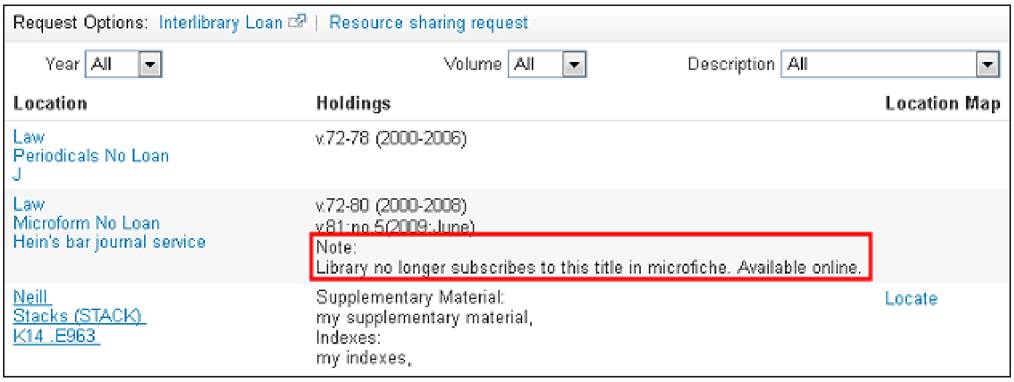


Figure 110: Public Notes in Holdings List on Primo Get It Tab

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.

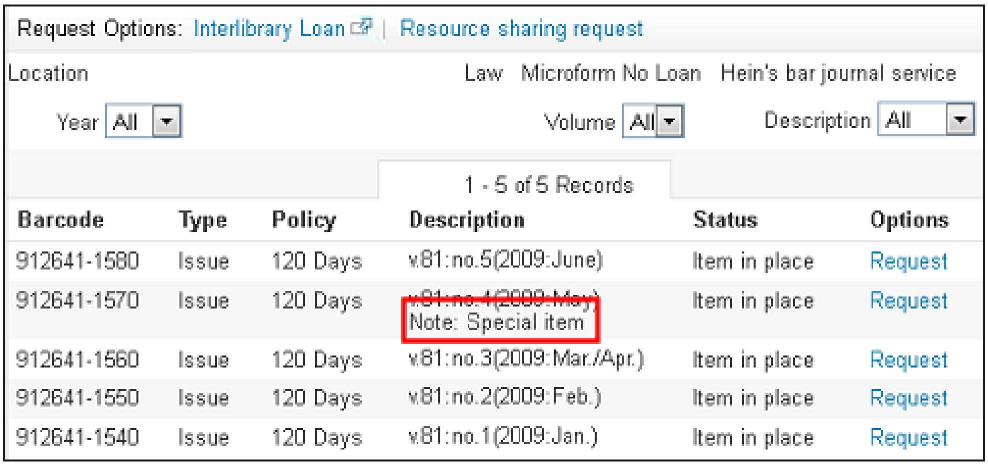


Figure 111: Public Notes in Items List on Primo Get It Tab

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

PERMISSIONS:

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 Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Labels** under **Discovery Interface Display Logic**.
2. Click the **Customize** button in the line containing the following code and modify the text in the **Description** field:

   c.uresolver.getit2.item_list.note
3. Click **Customize** at the bottom of the page to store the modified label in the system.

Displaying Additional Holdings Information in the Primo Get It Tab

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 **display_additional_holding_fields_in_getit** Other Settings parameter.

Table 17. Display Additional Holdings Information

MARC Field	Description	Requires Enabling?
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

Table 17. Display Additional Holdings Information

MARC Field	Description	Requires Enabling?
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) ■ $d (Date of acquisition) This information appears after the "**Source of Acquisition:** " label, which can be customized by modifying the description for the following code: `c.uresolver.getit2.holding_list.source_of_acq`	Y

Table 17. Display Additional Holdings Information

MARC Field	Description	Requires Enabling?
852 $t (Copy number)	This field displays after the public note (852 $z) and is prefixed with the "**Copy:** " label, which can be customized by modifying the description for the following code: `c.uresolver.getit2.item_list.copy`	N

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

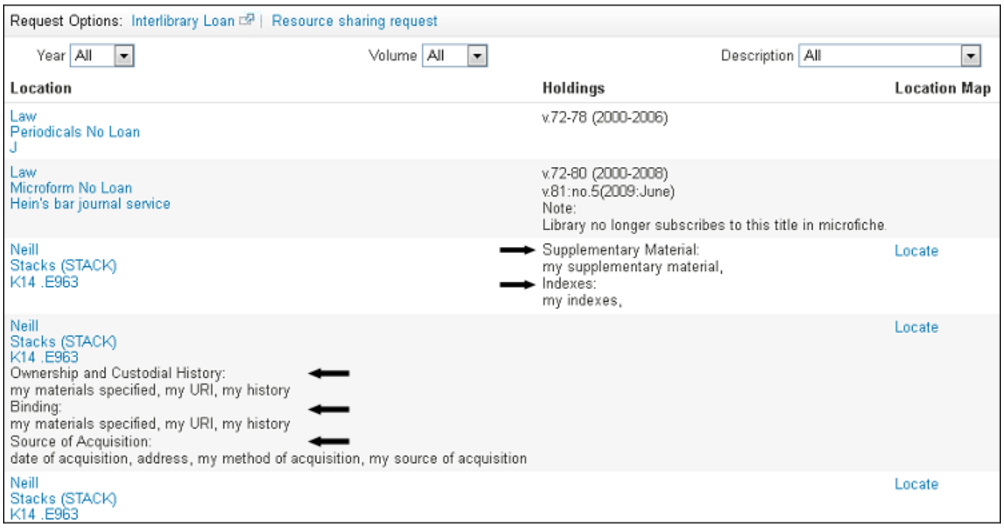


Figure 112: Additional Holdings Information Shown in the Primo Get It Tab

PERMISSIONS:

The following role can modify the parameters in the CustomerParameters mapping table:

- General System Administrator

To display additional holdings information in the Primo Get It tab:

1. On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Other Settings** under **General Configuration**.
2. Click the **Customize** button to the right of the following customer parameter and change the **parameter value** field to **true**:

   `display_additional_holding_fields_in_getit`

3 Click **Save** at the bottom of the page to store the modified parameter in the system.

PERMISSIONS:

Either of the following roles can modify display labels:

- Fulfillment Administrator
- General System Administrator

To modify a display label:

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

7

Alma as a Source of Holdings Information for Primo Central

This section includes:

Introduction

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

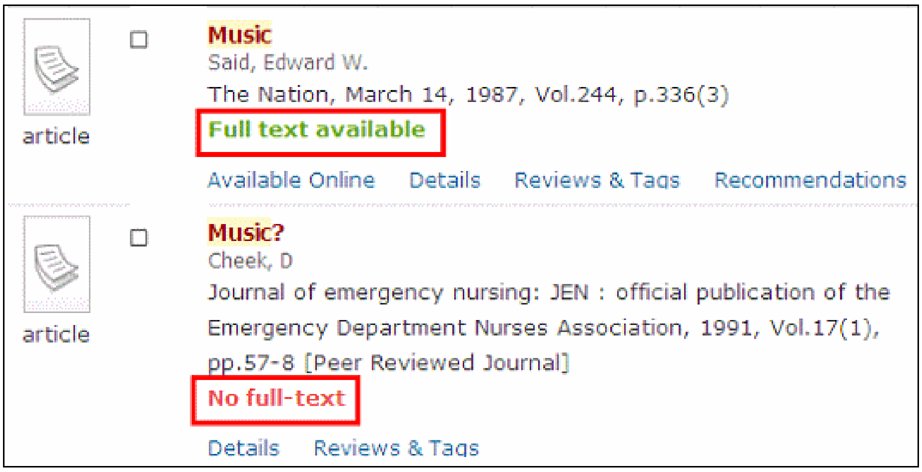


Figure 113: Primo Central Results - Availability Indicators

The following processes create the status indicators:

- The Alma institution publishes its electronic holdings to a holdings file.
- Primo Central imports the holdings file, creates the status indicators, and then stores the records in the database.

Publishing Electronic Holdings to Primo Central

To publish electronic holdings to Primo Central, you must configure a publishing profile and run it in Alma.

Configuring the Publishing Profile

The publishing profile allows you to configure the settings used to generate the electronic holdings file that Primo Central uses to update the status indicators. This process should be run weekly to make sure that the holdings information is accurate.

The **Electronic Profiles** section in the **Publish electronic records to Primo Central** jobs allows you to define profiles for groups of libraries and campuses that are defined as inventory management groups in a multicampus configuration, and for which a Primo institution has been defined. This allows the publishing job to create additional holdings files at the campus/library level so that Primo Central can determine the full-text availability per Alma campus/ library (which is defined as a Primo institution).

VIDEO:

For more information about publishing electronic records per campus/ library, see the *Library-Level Publish to Google Scholar and Primo Central* video (4:08 mins).

To configure the publishing profile for Primo Central publishing:

1 On the Resource Management Configuration page in Alma (**Resource Management > Resource Configuration > Configuration Menu**), click **Publishing Profiles** in the **Record Export** section.

The Publishing Profiles page opens.

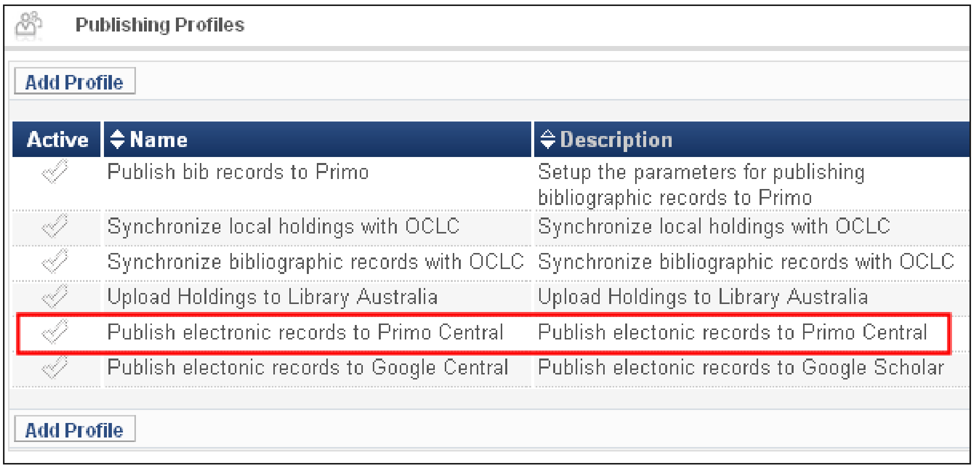


Figure 114: Publishing Profiles Page

2 In the row that contains the **Publish electronic records to Primo Central** profile, select **Actions > Edit**.

The Publishing Profile Details page opens.

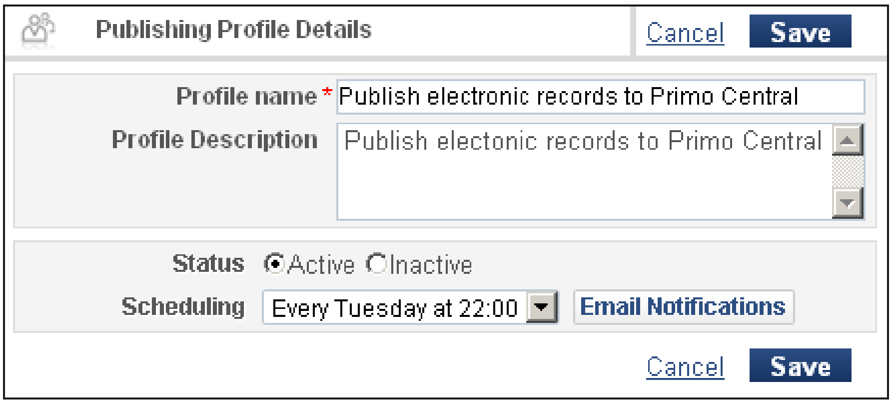


Figure 115: Publishing Profile Details Page (Standard Configuration)

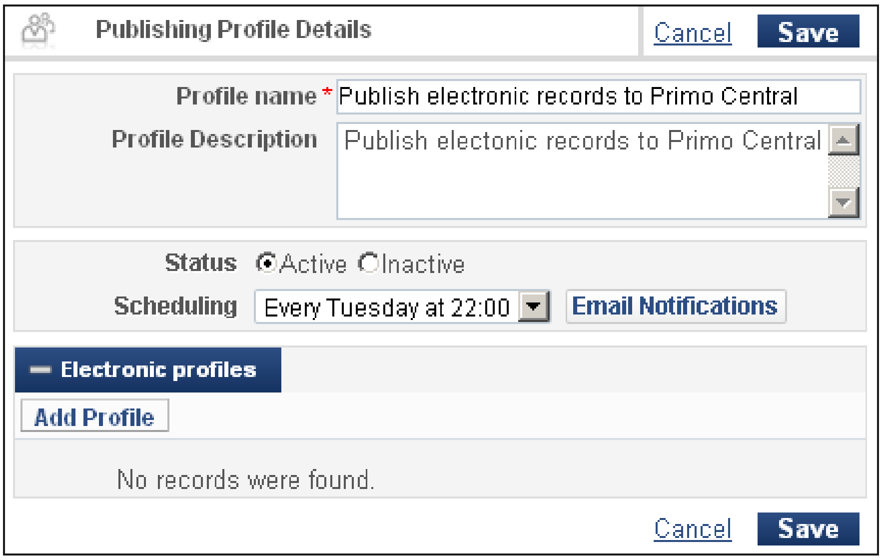


Figure 116: Publishing Profile Details Page (Multicampus Configuration)

3 In the **Scheduling** drop-down list, select one of the weekly options.

NOTE:
If your institution belongs to a Collaborative Network (CN), this export process must be run at the Network Zone (NZ) institution the day before it is run at each member institution. This allows updates to the network inventory to be included in the holdings file for each member institution.

4 Click **Email Notifications** to specify which users and email addresses will receive email notifications when the publishing profile has completed.

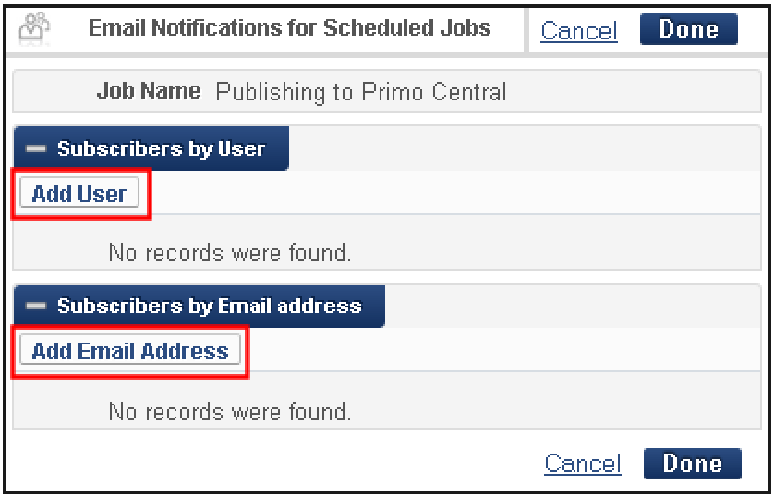


Figure 117: Email Notifications for Scheduled Jobs Page

5 Select the users that you want to receive email notifications.

a Click **Add User**.

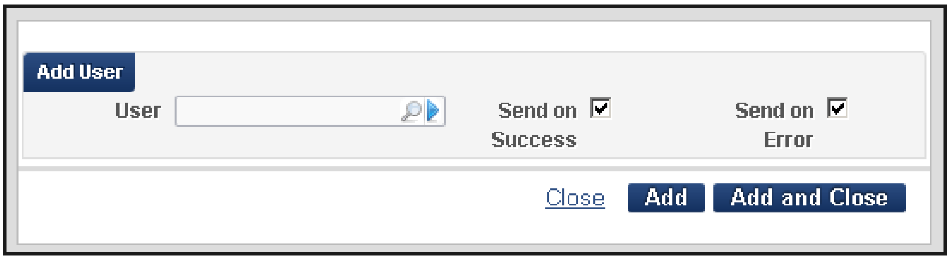


Figure 118: Add User Dialog Box

b In the **User** field, search for and select a user name.

c Select the following options to specify when the email notification will be sent to the user: **Send on Success** and **Send on Error**.

d Click **Add** to include additional users, click **Add and Close** to add the user and also close the dialog box, or click **Close** to exit the dialog box.

6 Select the email addresses that you want to receive email notifications.

a Click **Add Email Address**.

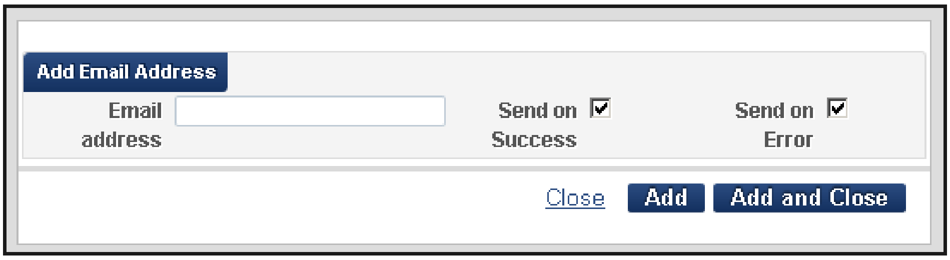


Figure 119: Add Email Address Dialog Box

b In the **Email address** field, enter an email address.

c Select the following options to specify when the email notification will be sent to the email address: **Send on Success** and **Send on Error**.

d Click **Add** to include additional email addresses, click **Add and Close** to add the email address and also close the dialog box, or click **Close** to exit the dialog box.

e Click **Done** to return to the Profile Details tab.

7 If each group of campuses/libraries in a multicampus configuration has been defined as a Primo institution, define a profile for each group of campuses and libraries. Otherwise, continue to the next step:

a Click **Add Profile** to open the Add Profile dialog box.

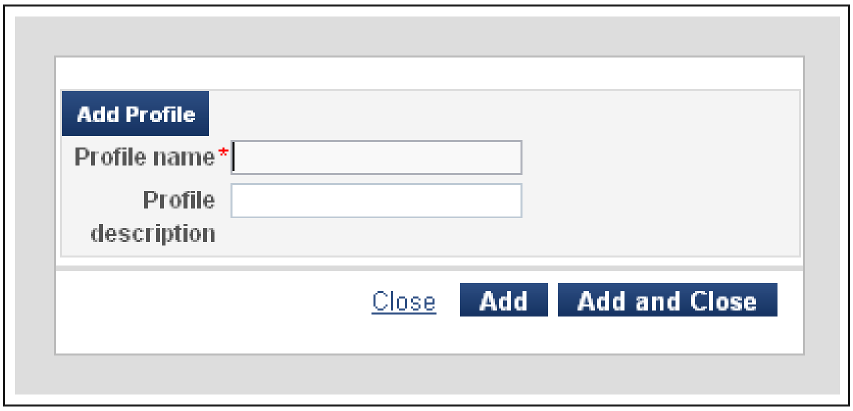


Figure 120: Add Profile Dialog Box (Multicampus Configurations Only)

b Specify a name for campus or library in the **Profile name** field.

c Click **Add and Close** to return to the Publishing Profile Details page.

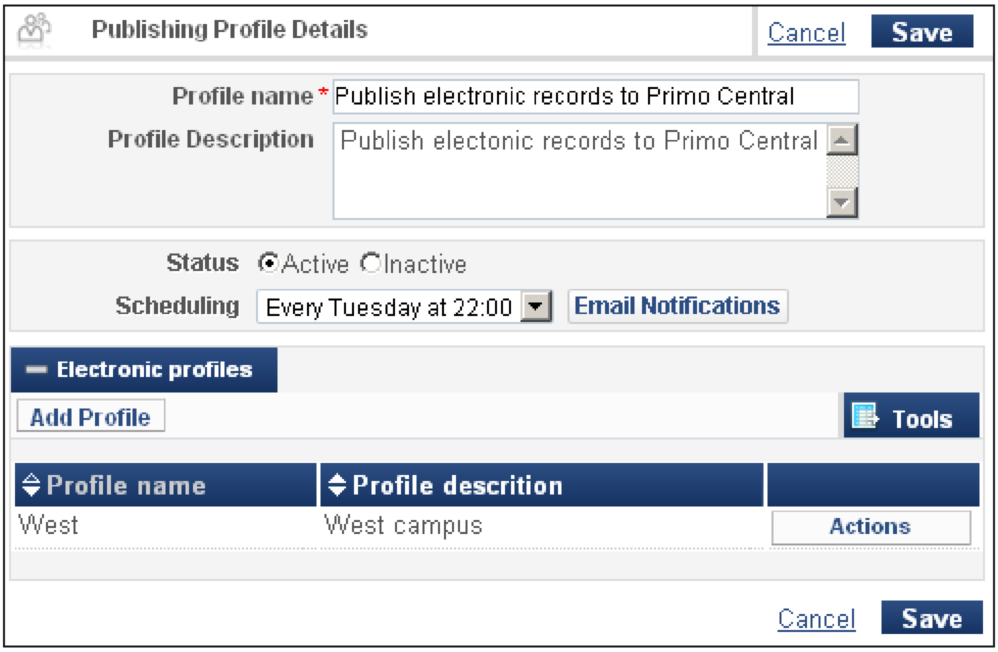


Figure 121: Publishing Profile Details Page (Added Profile)

d Click **Actions > Edit** to edit the new profile. The Publishing Profile Details page for the selected profile opens.

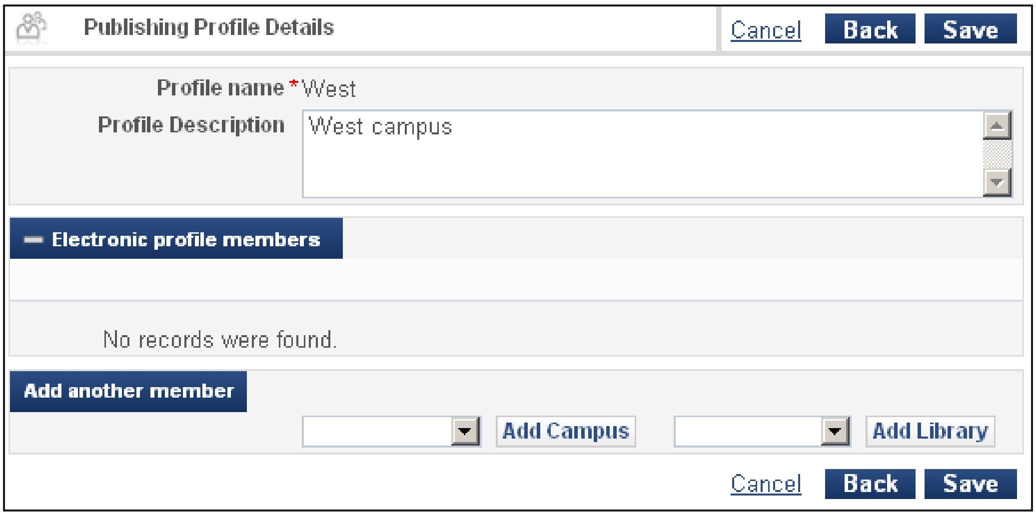


Figure 122: Publishing Profile Details Page (Electronic Profile Members)

e In the **Add another member** section, use the following fields to add members to the profile group:

- **Campus** – Select a campus from the drop-down list and click **Add Campus**.
- **Library** – Select a library from the drop-down list and click **Add Library**.

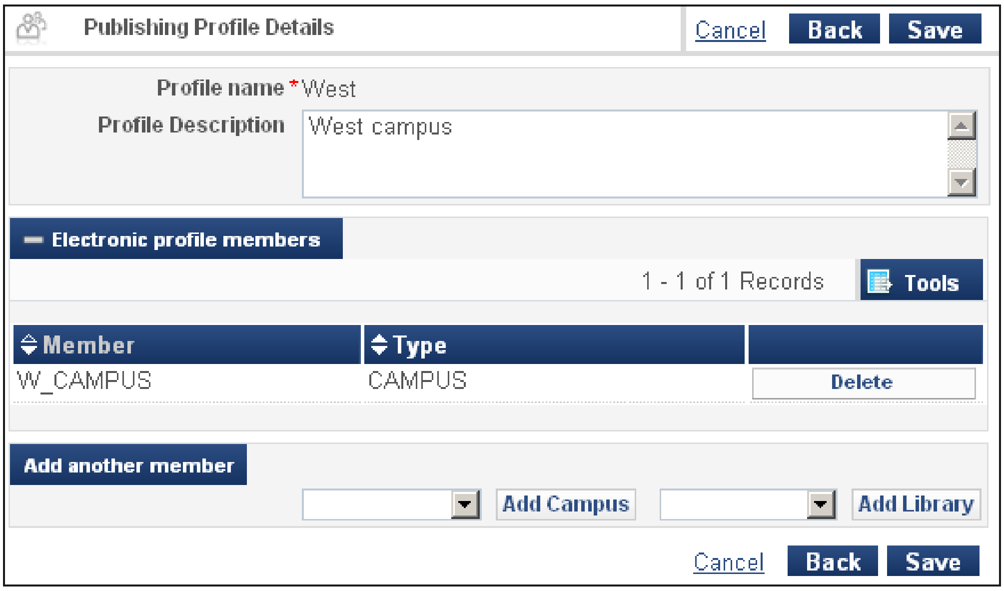


Figure 123: Publishing Profile Details Page (Member Added)

f Click **Save** to save the changes to the member profile.

8 Click **Save** to save the changes to the export publishing profile.

Running and Monitoring the Export Process

Although it is recommended that you publish weekly, you can do it manually, if required.

NOTE:
If your Alma institution belongs to a CN, this export process must be run at the NZ institution the day before it is run at each member institution. This allows updates to the network inventory to be included in the holdings file for each member institution.

To run the export:

1. On the Resource Management Configuration page in Alma (**Resource Management > Resource Configuration > Configuration Menu**), click **Publishing Profiles** in the **Record Export** section.
2. In the row that contains the **Publish electronic records to Primo Central** profile, select **Actions > Run**. The job is run as soon as Alma can accommodate it.
3. If you want to view the results of the publishing process, in the row that contains the **Publish electronic records to Primo Central** profile, select **Actions > History**.

   The Monitor Jobs page opens, allowing you to filter the job history by date and type of job. For more information, see **Monitoring Jobs** in the *Alma Administration Guide*.

The Output of the Publishing Process

The publishing job writes the holdings information to the following file for standard configurations:

```
/exlibris/urm/u1_1/Alma_root/<customer code>/<institution code>/output/Primo/institutional_holding.xml
```

For multicampus configurations, the publishing job writes the holdings information to the following file for each group of campuses/libraries:

```
/exlibris/urm/u1_1/Alma_root/<customer code>/<institution code>/output/Primo/<member_code>/institutional_holding.xml
```

Configuring Primo Central to Use the Institutional Holdings File

In order for Primo Central to update the status indicators for the institutional holdings, it must know where the published holdings file is stored. Although the holdings file should be updated weekly, this configuration needs to be set only once, which may occur while registering your institution with the Primo Central service.

NOTES:

- You can assign only one institutional holdings file per Client UID (or PC Key). If you are already a Primo Central customer and you want to use the PC for Alma, you must register a new client, get a new PC Key, and link the PC Key to the Primo institution that is integrated with Alma. This will also allow you to create an independent environment to test the integration of Alma and Primo Central.
- For multicampus configurations, a Primo institution must be defined for each PC publishing profile in order to register separate holdings files per inventory management group. For more information, see **Alma Multicampus Setup in Primo** on page **59**.

To set the URL of the holdings file:

1. In the Primo Back Office, click **Profile** next to the **PC Key** field. Note that this button does not display until you have registered your Primo institutions to use Primo Central.

   The main menu on the My Profile page opens to update your Primo Central settings.
2. Click **My Client Applications** to display the list of clients associated with your institution.
3. Select the client application that was used to register the Primo Central service in Primo.
4. Click **Edit Client Attributes**.

5 In the SFX institutional holdings file URL field, use the following format to enter the URL for the holdings file:

For standard configuration:

```
https://<alma_server>/rep/
getFile?institution_code=<Alma_Institution_Code>&file=
institutional_holding
```

For example:

```
https://alma.exlibrisgroup.com/rep/
getFile?institution_code=01MY_INST&file=
institutional_holding
```

For multicampus configuration (*member_name* should be set to the name of the PC publishing profile):

```
https://<alma_server>/rep/
getFile?institution_code=<Alma_Institution_Code>&file=
institutional_holding&member_code=<profile_name>
```

For example:

```
https://alma.exlibrisgroup.com/rep/
getFile?institution_code=01MY_INST&file=
institutional_holding&member_code=West
```

Creating an Environment to Test Primo Central

Library institutional holdings must be published and harvested by Primo Central every week to keep the availability information stored in Primo Central up-to-date.

To create a test environment:

1 Access the Primo Central Registration Wizard.

The main menu on the My Profile page opens to update your Primo Central settings.

2 Click **My Client Applications** to display the list of clients associated with your institution.

3 Add a client application to test the integration with Alma.

In a week you will receive an e-mail message with your new PC key.

4 In the Primo Back Office, edit the Primo institution that is integrated with Alma by entering the new PC key.

5 Click **My Profile** to open the Primo Central Wizard.

6 Select the client that you created and make sure that the institutional holdings file is entered correctly.

7 Activate the Primo Central collections.

NOTE:
During the next weekend, Primo Central will load the institution holdings file.

8 Make sure that your Primo view contains a scope for Primo Central.

9 Perform a search in the Primo Central scope to ensure that the availability indicators have been loaded correctly.

NOTE:
During the migration from an old Primo environment to a new Primo environment with Alma, PC search results may be different if the PC activations are different for each environment. To compare the environments, PC activations must be the same in both environments.

8

Alma and Patron Directory Services

This section includes:

Introduction

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:

Note that 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

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

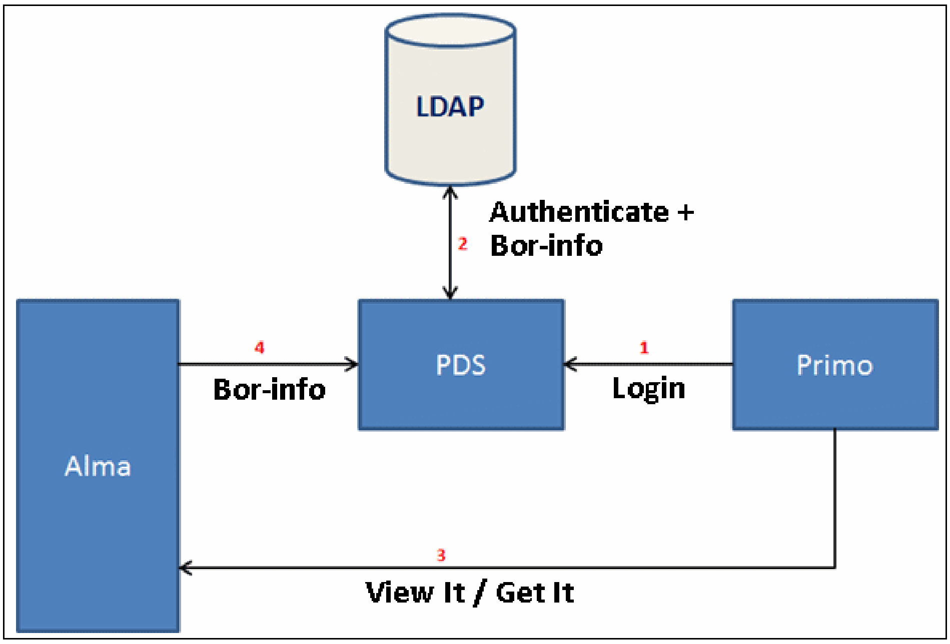


Figure 124: Alma - Primo Authentication Flow

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

```
http://primo1.staging.alma.hosted.exlibrisgroup.com:8991/
pds?func=bor-info&calling_system=urm&pds_handle=12345678
```

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

```
<?xml version="1.0" encoding="UTF-8" ?>
  <bor>
    <bor_id>
<id>exl_support</id>
  <handle>238201234424355210608314832l7</handle>
  <institute>01BC_INST</institute>
    </bor_id>
    <bor-info>
  <id>exl_support</id>
  <institute>01BC_INST</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 Alma:

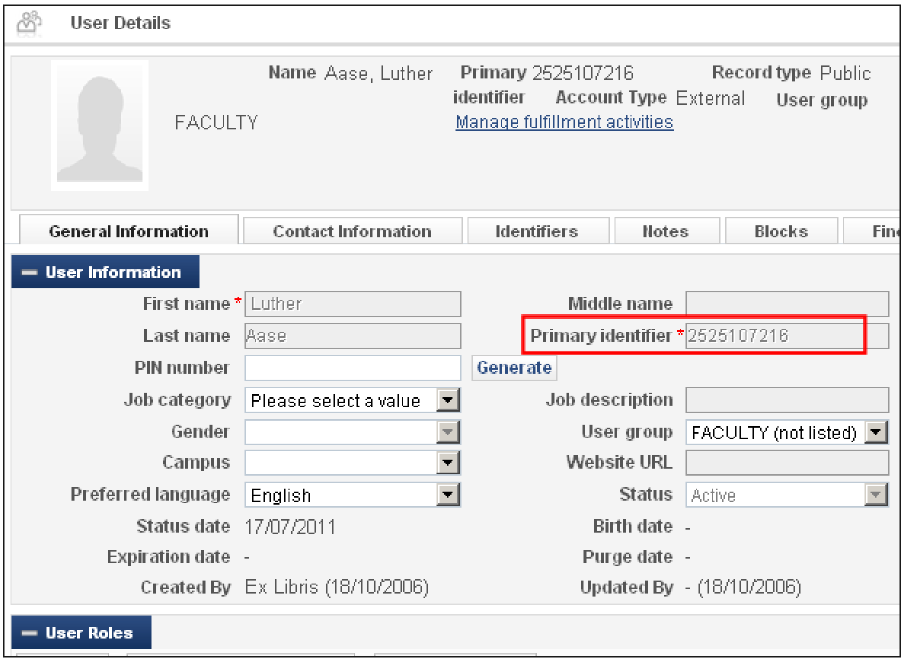


Figure 125: Matching the User Name Field in Alma

PDS Configurations

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

Configuring the PDS URL

To identify patrons, Alma must point to the relevant PDS server (see #4 in the figure above). This is configured in Alma's Customer Parameters mapping table (**Administration > General Configuration > Configuration Menu** > **General Configuration** > **Other Settings**), by entering the URL of the PDS in the **primo_pds_url** field (see **Figure 126**).

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.

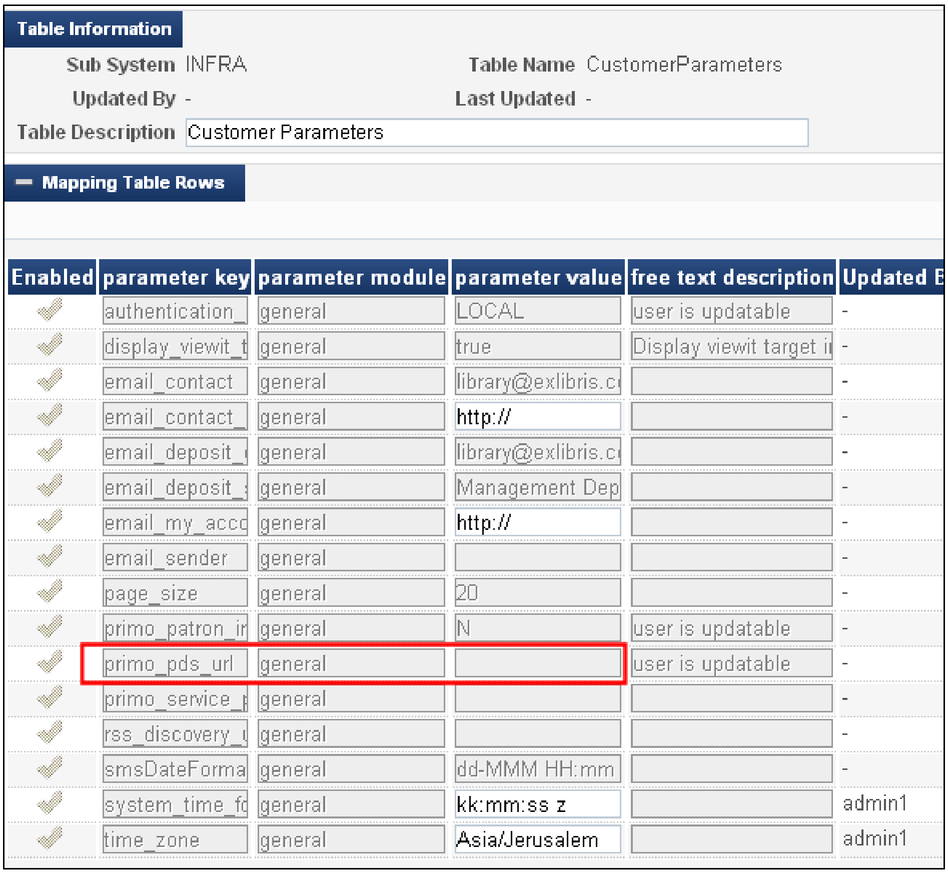


Table Information

Sub System INFRA | Table Name CustomerParameters
Updated By - | Last Updated -
Table Description Customer Parameters

Mapping Table Rows

Enabled	parameter key	parameter module	parameter value	free text description	Updated B
✓	authentication_	general	LOCAL	user is updatable	-
✓	display_viewit_t	general	true	Display viewit target i	-
✓	email_contact_	general	library@exlibris.c		-
✓	email_contact_	general	http://		-
✓	email_deposit_	general	library@exlibris.c		-
✓	email_deposit_	general	Management Dep		-
✓	email_my_acco	general	http://		-
✓	email_sender	general			-
✓	page_size	general	20		-
✓	primo_patron_i	general	N	user is updatable	-
✓	primo_pds_url	general		user is updatable	-
✓	primo_service_	general			-
✓	rss_discovery_	general			-
✓	smsDateForma	general	dd-MMM HH:mm		-
✓	system_time_fo	general	kk:mm:ss z		admin1
✓	time_zone	general	Asia/Jerusalem		admin1

Figure 126: Alma General Customer Parameters

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, refer to 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, click **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 Click **Sign in** and enter your login information.

5 Perform a search.

6 In a brief result, click **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 Click **My Account** and then click 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:
This is not the preferred way to set up Primo's PDS, because it is preferable to manage passwords in an external system (such as LDAP and SHIB). It is possible to store passwords in Alma, but only for users who are defined as internal users in Alma, as demonstrated in the following figure:

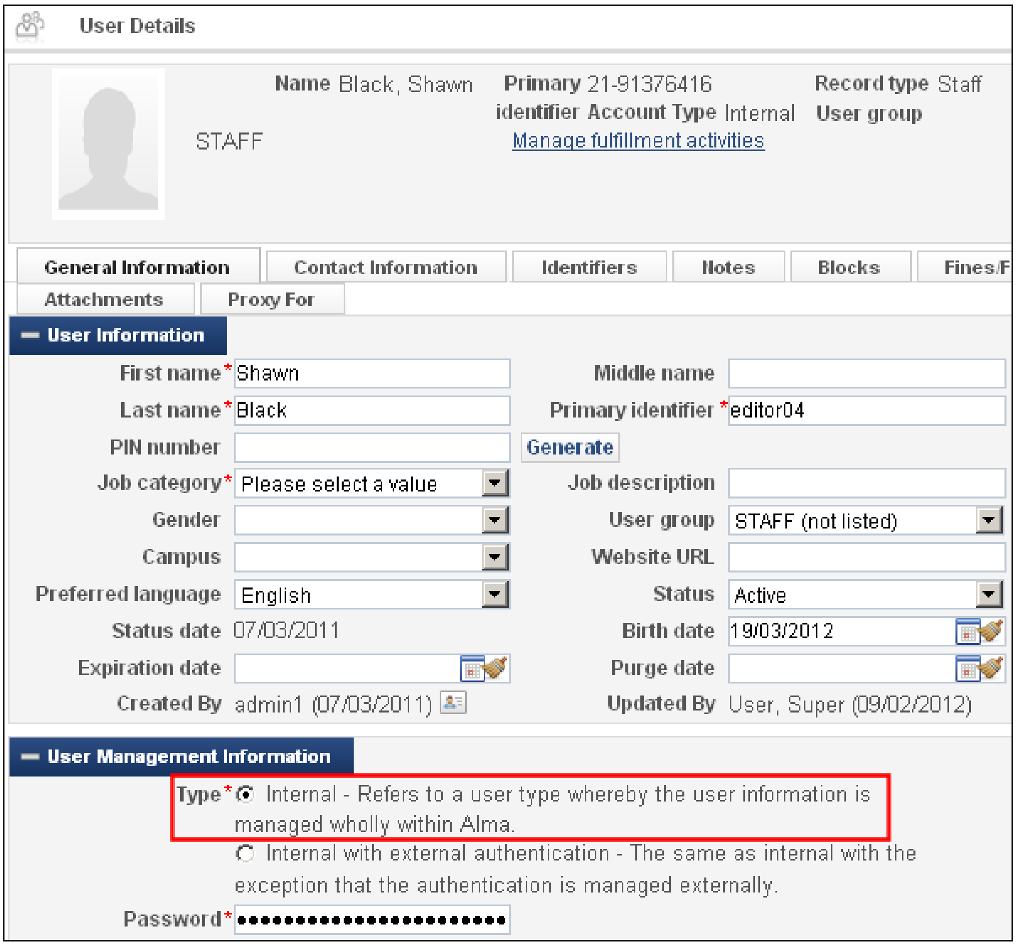


Figure 127: Internal Alma User

This is mainly done for patrons who are guests in the library and are not part of the institution's directory. In such cases, it is preferable to configure the Primo PDS to first try the institution LDAP, and if this authentication fails, use Alma as a user directory.

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
./apachectal_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 `AUTHETICATE`, `BOR_INFO`, and `INSTITUTE_DISPLAY` sections for your institution. For example:

```
[AUTHENTICATE]
program = dps.pl
params = qa.alma.exlibrisgroup.com,80,BOR_AUTH,N
[END]

[BOR_INFO]
program = dps.pl
params = qa.alma.exlibrisgroup.com,80,BOR_INFO,N
[END]

[INSTITUTE_DISPLAY]
code = 01BC_INST
desc = Boston College
lang = ENG
primo = BCL
[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.

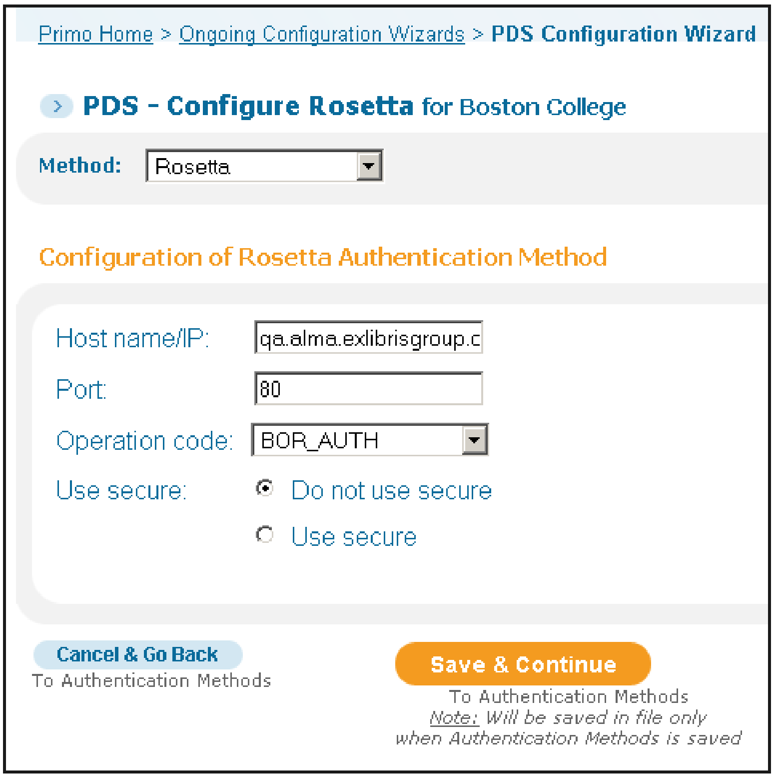


Figure 128: Define the AUTHENTICATE Section

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

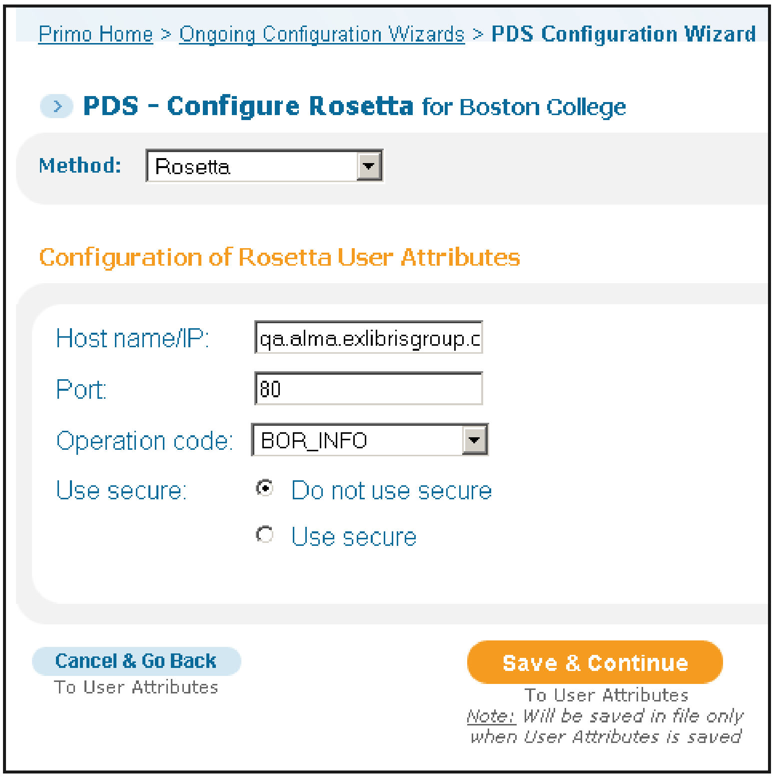


Figure 129: Define the BOR-INFO Section

To test the PDS configuration:

1 Open the Primo Front End in a browser, but do not sign in.

2 Click **My Account** and then click the **Personal Settings** tab.

No personal settings should display.

3 Click **Sign in** and enter your login information.

4 Click **My Account** and then click 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:

```
http://primo1.staging.alma.hosted.exlibrisgroup.com:8991/
pds?func=bor-info
```

A

Making the Primo Front End Read Only

This section describes the steps required to make the Primo Front End read only during an upgrade.

To make the FE read only:

1. Copy your view's CSS file to a Web-accessible location.
2. On the Primo Home > Advanced Configuration > All Mapping Tables > Front End subsystem page, edit the CSS mapping table.
3. In the **Create a New Mapping Row** section, specify the following fields and click **Create** to add a new row for the new CSS file:
   - **CSS Name** – Specify a Back Office display name for the read-only CSS file.
   - **CSS URL** – Enter the URL of the CSS file you placed on the Web-accessible location.

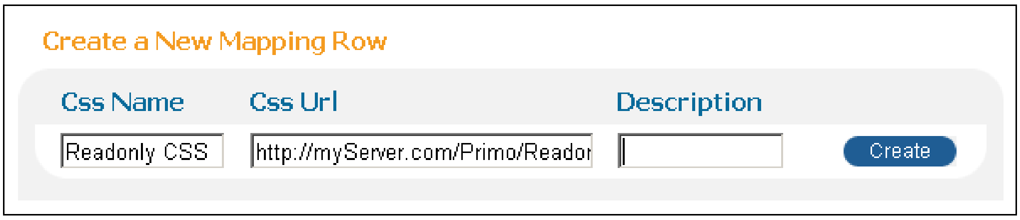


Figure 130: CSS Mapping Table - Add New CSS

4. Add the following information to a new HTML file that is used to alert users of the system upgrade stage:

```
<div style="padding: 0px; margin: 0px 0px 0px 0px; font-size: 80%;
border-bottom: 1px solid #E1E1E1; border-top: 1px solid #E1E1E1;
background-color: #d93f3b; color: #ffffff; text-align: center;
line-height: 36px; font-weight: bold">
Due to system upgrade some services may not be available. Please
contact library staff for additional information and services.
</div>
```

5 Place the new HTML file in a Web-accessible location.

6 On the Primo Home > Ongoing Configuration Wizards > Views Wizard page, click **Edit** next to your view in the list.

The Edit View Attributes opens.

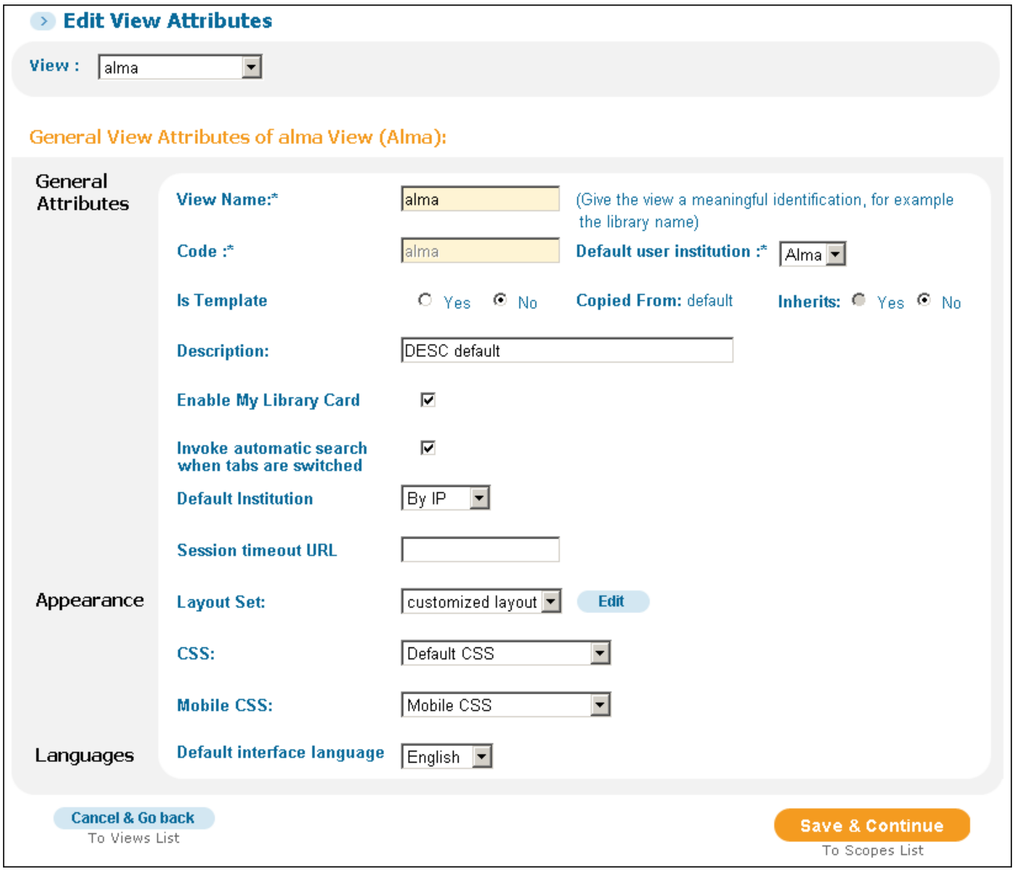


Figure 131: Edit View Attributes

7 Select the read-only CSS item in the **CSS** drop-down field.

8 Click **Edit** next to the **Layout Set** drop-down field.

The Layout Set Editor opens.

9 For each of the following pages in the FE, add a new tile for your new HTML file: **Full Display**, **Brief Display**, and **Home Page**.

g Select the first DIV section and then click **Add Tile** in the box that opens.

h Select **Custom Tile** in the **Content** drop-down field and then enter the URL of the HTML file in the **URL** field.

i Click **Save**.

j Click **Save Page**.

k Click **Continue** to exit the Layout Editor and then deploy the view.

10 Perform the following changes on your read-only CSS file:

a Replace the relative path **`../images/`** with the full path for each image.

For example:

```
http://primo-demo.exlibrisgroup.com:1702/primo_library/
libweb/images/
```

b Add the following lines to the end of the file:

```
/*Readonly Attributes*/
.EXLMyShelf {display: none;}
.EXLMyAccount {display: none;}
.EXLButtonSendToMyShelf  {display: none;}
.EXLButtonSendToMyShelfAdd {display: none;}
.EXLButtonSendToMyShelfRemove {display: none;}
#exlidMainMenuItem2 {display:none;}
EXLTabsRibbon div li.EXLReviewsTab  {display:none;}
.EXLTabsRibbon div li.EXLRequestTab {display:none;}
.EXLLocationTableActions {display:none;}
.EXLLocationTableHeaderActions {display:none;}
.EXLMainMenuITEMHelp {display: none;}
.EXLTabHeaderButtonSendTo {display: none;}
```

c Change the following line:

```
EXLTabHeaderButtons ol.EXLTabHeaderButtonSendToList li{ float:left;
background-image:none; display:block; clear:both; border:none;z-
index:100; width:100%; white-space:nowrap; border-bottom:1px solid
#e1e1e1;border-left:1px solid #e1e1e1;border-right:1px solid
#e1e1e1; background-color: #ffffff}
```

To:

```
.EXLTabHeaderButtons ol.EXLTabHeaderButtonSendToList li{
float:left; background-image:none; /*display:block;*/ clear:both;
border:none;z-index:100; width:100%; white-space:nowrap; border-
bottom:1px solid #e1e1e1;border-left:1px solid #e1e1e1;border-
right:1px solid #e1e1e1; background-color: #ffffff}
```

d Comment out the following line:

```
/*.EXLFacetContainer div.EXLFacetActions {color:#000000; font-
weight:normal; font-size:80%; padding:0em;background-color:#f8f8f8;
border-top:1px solid #e4e4e4; border-bottom:1px solid #e4e4e4;
line-height:150%; text-indent:0em;  margin-bottom:0.2em ;padding-
left:0.7em; display:block; height:1.5em }*/
```

e Add the following line to replace the definition of the line that was commented out in the previous step:

```
.EXLFacetContainer div.EXLFacetActions {display: none;}
```

f Change the following line:

```
#exlidAdvancedSearchRibbon div.EXLAdvancedSearchFormRow
span.EXLAdvancedSearchFormRowInlineInput a{display:inline; white-
space:nowrap; margin-left:1em}
```

To:

```
#exlidAdvancedSearchRibbon div.EXLAdvancedSearchFormRow
span.EXLAdvancedSearchFormRowInlineInput a{/*display:inline;*/
white-space:nowrap; margin-left:1em}
```