

Alma January 2015 Release:
**Celebrating Simone
de Beauvoir's
birthday**
9th January



Alma-Primo Integration

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Table of Contents

Chapter 1	Introduction	7
Chapter 2	Basic Primo Configuration for Integration with Alma.....	9
	Configuring the Primo Institution	9
	Viewing and Exporting the Alma Libraries.....	13
Chapter 3	Publishing Alma Data to Primo	15
	Exporting Alma Records to Primo	15
	<i>Publishing to Primo</i>	16
	<i>Publishing from the Network Zone Institution</i>	21
	<i>Report on the Network Publishing Job</i>	25
	<i>The Output of the Publishing Process</i>	27
	<i>The Format of Published Data</i>	27
	Suppressing Alma Records from Primo.....	29
	Republishing Sets of Bibliographic Records.....	29
	<i>Republishing Sets of Bibliographic Records from the NZ</i>	31
	<i>Republishing Sets of Bibliographic Records from a Member Institution</i>	32
	<i>Displaying Hidden Publishing Profiles and Jobs for Member Institutions</i>	33
	Excluding Process Types from Publishing	34
	Displaying Alternative Call Number Information in Primo.....	35
	Available For and Library-Level Ownership of E-Resources Published to Primo	36
	Harvesting and Publishing Alma Records in Primo	38
	<i>Define Alma as a Data Source</i>	38
	<i>Create a Set of Normalization Rules</i>	39
	<i>Deploy, Load, Index (not Alma-specific)</i>	40
Chapter 4	Configuring the Primo Front End for an Alma Data Source	43
	Creating a Primo View.....	43
	Removing the Locations Tab.....	44
	Configuring Primo Delivery of Alma Data and Services	44
	<i>Delivery Settings for Local Primo Records Harvested from Alma</i>	45
	<i>Modifying the Online Resource Delivery Category</i>	46

	<i>Out-of-the-Box Delivery Settings for Local Alma Records</i>	47
	<i>Out-of-the-Box Delivery Settings for Remote Search Records</i>	49
	Configuring Real-Time Availability	51
	Collaborative Network Support.....	56
	<i>Availability Statuses</i>	57
	<i>The More Link and Institutions Lightbox</i>	57
	<i>Requests from Any Member Institution</i>	59
	Alma Multicampus Setup in Primo	59
	<i>Setup</i>	60
	<i>Institution Wizard</i>	60
	<i>Physical Holdings</i>	60
	<i>Views</i>	61
	<i>Normalization Rules</i>	61
	<i>Additional Mappings</i>	62
	My Account	62
	<i>Selecting an Institution</i>	63
	<i>Updating Patron Information</i>	63
	<i>Updating Self-Check Machine PINs</i>	64
	<i>Paying Fines and Fees</i>	66
	<i>Configuring the Pay Fine Link</i>	70
	<i>Disabling Paging for Request List APIs</i>	71
	<i>Configuring the Sort Direction for List of Loans</i>	71
	A-Z List	73
	Citation Linker	78
	Direct Linking to the Resource Sharing Request Form.....	81
	Configuring Course Reserves in Primo.....	83
Chapter 5	Configuring the Primo Front End for Alma's Link Resolver.....	97
	Introduction.....	97
	Base_URL for the Services Page	98
	Description of the Services Page	99
	Configuring Delivery for the Services Page	101
	Configuring the OpenURL Link Action (V4.9)	104
	<i>Back Office Configuration</i>	105
Chapter 6	Configuring Alma's Delivery System	107
	Introduction.....	107
	The Primo View It Tab.....	108

	The Primo Get It Tab	108
	<i>Holdings List</i>	109
	<i>Configuring the Sort Order of Physical Items</i>	110
	<i>Items List</i>	110
	<i>Request Options</i>	112
	Modifying Display Logic Rules	113
	Modifying Display Labels	114
	Configuring Related Records for Display in Primo	114
	Resolving Electronic Resources in the Network Zone	114
	Configuring the Resource Sharing Library	116
	Configuring Best Location.....	118
	Branding the Delivery Tabs	119
	<i>Creating a New Skin</i>	120
	<i>Modifying a Skin</i>	123
	Configuring the Delivery Tabs	125
	Adding Primo's Search Box to the Alma Home Page	128
	Adding a General Electronic Service	133
	Configuring the WPM Education E-Payment System in Alma	139
	Displaying Historical Loans in Primo	143
	Displaying License Information in the View It Tab.....	143
	Displaying Public Notes in the Primo Get It Tab.....	145
	Displaying Additional Holdings Information in the Primo Get It Tab.....	147
Chapter 7	Alma as a Source of Holdings Information for Primo Central	151
	Introduction.....	151
	Publishing Electronic Holdings to Primo Central	152
	<i>Configuring the Publishing Profile</i>	152
	<i>Running and Monitoring the Export Process</i>	158
	<i>The Output of the Publishing Process</i>	158
	Configuring Primo Central to Use the Institutional Holdings File.	159
	Creating an Environment to Test Primo Central	160
Chapter 8	Alma and Patron Directory Services	163
	Introduction.....	163
	Identify Patrons to Provide Relevant Services	163

<i>PDS Configurations</i>	165
<i>Configuring the PDS URL</i>	165
<i>Configuring the PDS bor-info Function</i>	166
Alma as the Patron Directory for Authentication.....	167
<i>PDS Configurations</i>	168
<i>Applying the Version Fix to PDS</i>	168
<i>Configuring the Calling Institution</i>	169
Appendix A Making the Primo Front End Read Only	173

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** on page 9
- **Viewing and Exporting the Alma Libraries** on page 13

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 the Alma 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*.

General Institution Attributes for:

Institution Code:	01BC_INST	Primo Institution Name	Boston College
MetaLib Institution Code:	VISLAND	MetaLib Portal Code:	VISLAND
MetaLib User Name:	VISLAND	MetaLib password:	••••
Alma Institution Code:	01BC_INST		
SFX Institute:		bX Token:	<input type="text"/> Register
Source ILS institution Codes:	01BC_INST	Hot Articles Token:	primo-generic Register
PDS Configuration	Alma qa08	PC Key:	01BC.BCL.PSTG My Profile
Description:	Boston College	Customer ID:	d3f4d10c78dc1e2

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*.

Delivery Base URLs:

MetaLib	<input type="text" value="http://qa-server02.corp.exlibrisgroup.com:8331?user_name=mladmin&user_passwo"/>
SFX	<input type="text"/>
ILS	<input type="text"/>
Alma	<input type="text" value="https://il-urmqa01.corp.exlibrisgroup.com:1801/view/uresolver/01MY_INST/openurl"/>
Alma Services Page URL	<input type="text" value="http://il-primo17.corp.exlibrisgroup.com:1603/openurl/01MY_INST/my_services_pg?"/>
Digital Repository	<input type="text" value="http://digitool-demo.exlibrisgroup.com:1801/webclient"/>
Digital Repository 2	<input type="text"/>
Digital Repository 3	<input type="text"/>
RTA	<input type="text" value="https://il-primoqa-alma01.corp.exlibrisgroup.com:1801/view/publish_avail"/>
API	<input type="text" value="https://il-primoqa-alma01.corp.exlibrisgroup.com:1801"/>

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*.

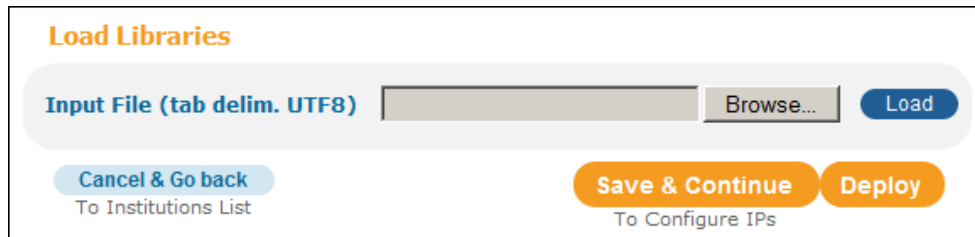


Figure 3: Load Libraries Section (Institution Wizard)

- **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.

Primo Back Office

[Primo Home](#) > [Ongoing Configuration Wizards](#) > **Institution Wizard**

> **Edit IPs**

Institution : Volcano Island University

Edit IPs for "Volcano Island University"

IP Range	Created	Last Updated
----------	---------	--------------

Create a New IP Range:

Start IP: End IP: Create

Load IPs

Input File (tab delim. UTF8) Browse... Load

Cancel & Go Back To Institution Edit Save Deploy

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.

Organization Unit Name	Main Campus	Organization Unit Type	Institution	Path	EXLDEV1.EXLDEV1_INST
Summary	Libraries	Contact Information	Calendar Management		
Organization Units List					
Add a Library					
1 - 11 of 11 Records					Tools
Organization Unit Name	Description	Organization Unit Type	Path		
Art Library	-	Library	EXLDEV1.EXLDEV1_INSTUARCV		Actions
Education Library	-	Library	EXLDEV1.EXLDEV1_INSTUEDUC		Actions
Law Library	-	Library	EXLDEV1.EXLDEV1_INSTULAW		Actions
Main Library	-	Library	EXLDEV1.EXLDEV1_INSTULINC		Actions
Main Reading Room	-	Library	EXLDEV1.EXLDEV1_INSTRLINC		Actions
Medical Library	-	Library	EXLDEV1.EXLDEV1_INSTUHLTH		Actions
Music Library	-	Library	EXLDEV1.EXLDEV1_INSTUMUSI		Actions
Music Reading Room	-	Library	EXLDEV1.EXLDEV1_INSTRMUSI		Actions
Physics Library	-	Library	EXLDEV1.EXLDEV1_INSTUPHY		Actions
Resource Sharing Library	Temporarily r is sent to or i sharing partn	Library	EXLDEV1.EXLDEV1_INSTRES_SHARE		Edit
Social Sciences	-	Library	EXLDEV1.EXLDEV1_INSTUGDOC		Actions

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** on page 15
- **Suppressing Alma Records from Primo** on page 29
- **Republishing Sets of Bibliographic Records** on page 29
- **Excluding Process Types from Publishing** on page 34
- **Displaying Alternative Call Number Information in Primo** on page 35
- **Available For and Library-Level Ownership of E-Resources Published to Primo** on page 36
- **Harvesting and Publishing Alma Records in Primo** on page 38

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:



Name	ID	Context Type
ExL FTP	19398010000121	Integration

Definition Type	Created by	Updated by
FTP	exl_support (12/01/13)	exl_support (12/01/13)

S/FTP Connection Details

Name	ExL FTP
Description	-
Server	ftp.exlibris-usa.com
Port	21
Sub-directory	Incoming
Min. Number of Files	1
Size type	GB
Ftp Server Secured	No
UserName	usoffice
Password	*****
Max. Number of Files	9999999
Max. file size	100000
Allow Navigation	True

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.

Publishing Profiles

Back

Profile Type

All

Add Profile

1 - 6 of 6 Records

Tools

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

Add Profile

1 - 6 of 6 Records


Tools

Back

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.

 Publishing Profile Details

[Cancel](#) [Save](#)

i The Run full publishing option should not be selected after "go live" without prior written consent from third-line Support staff.

i The predefined Electronic, Physical, and Digital options in the Content Options section should not be modified.

Profile Details

Profile name*

Publish bibliographic records to Primo

Profile description

Setup the parameters for publishing bibliographic records to Primo

Run full publishing

☐

Status

☒ Active ☐ Inactive

Scheduling

Not scheduled

[Email Notifications](#)

Submission Format

FTP configuration

Sub-directory

Content Options

Electronic

☒

Physical

☒

Digital

☐

Collection

☐


Course information enrichment

☐

Related records information enrichment

☐

Physical Inventory Enrichment

 Quick Add

Holding Tag

Holding Subfield

Bib Tag

Bib Subfield

[Add](#)

No records were found.

[Cancel](#)

[Save](#)

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	<p>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.</p> <hr/> <p>NOTE: The directory must be configured in advance because Alma cannot create it.</p> <hr/> <p>From the drop-down list, select the name of the S/FTP connection that you previously defined.</p>

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.

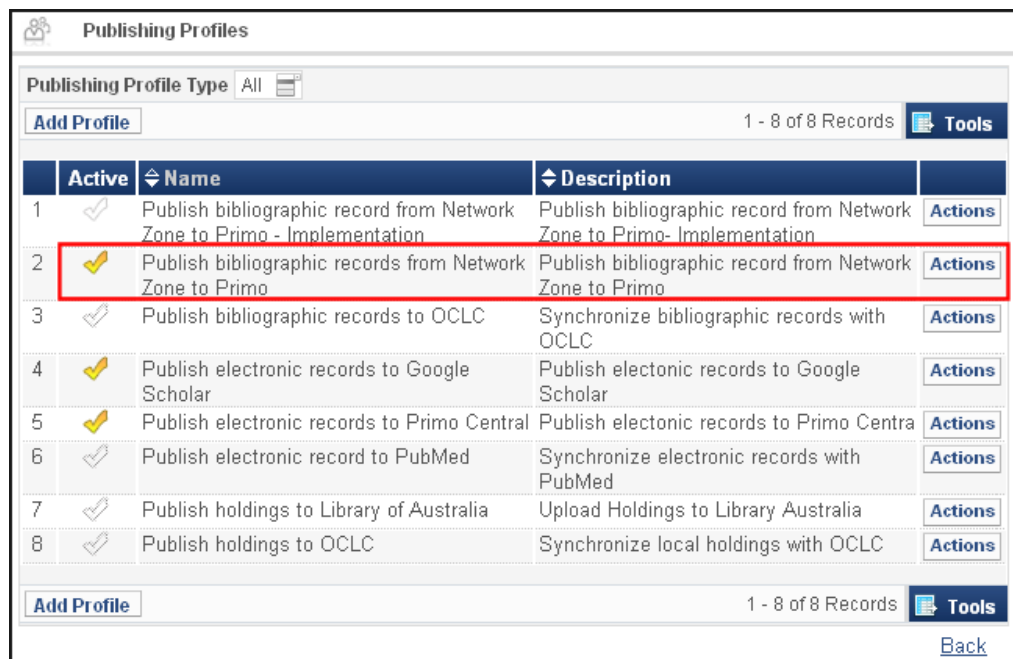
Publishing from the Network Zone Institution

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.



	Active	Name	Description	Actions
1	<input checked="" type="checkbox"/>	Publish bibliographic record from Network Zone to Primo - Implementation	Publish bibliographic record from Network Zone to Primo - Implementation	Actions
2	<input checked="" type="checkbox"/>	Publish bibliographic records from Network Zone to Primo	Publish bibliographic record from Network Zone to Primo	Actions
3	<input checked="" type="checkbox"/>	Publish bibliographic records to OCLC	Synchronize bibliographic records with OCLC	Actions
4	<input checked="" type="checkbox"/>	Publish electronic records to Google Scholar	Publish electronic records to Google Scholar	Actions
5	<input checked="" type="checkbox"/>	Publish electronic records to Primo Central	Publish electronic records to Primo Central	Actions
6	<input checked="" type="checkbox"/>	Publish electronic record to PubMed	Synchronize electronic records with PubMed	Actions
7	<input checked="" type="checkbox"/>	Publish holdings to Library of Australia	Upload Holdings to Library Australia	Actions
8	<input checked="" type="checkbox"/>	Publish holdings to OCLC	Synchronize local holdings with OCLC	Actions


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.


Publishing Profile Details
Cancel Save

Profile Details

Profile name * Publish bibliographic records from Network Zone to Primo
Profile description Publish bibliographic record from Network Zone to Primo

Status ☒ Active ☐ Inactive
Scheduling Every 6 hours, starting at 03:00 Email Notifications


Submission Format

FTP configuration **Sub-directory**

Content Options

Related records information enrichment ☐

Physical Inventory Enrichment

 **Quick Add**

Holding Tag	Holding Subfield	Bib Tag	Bib Subfield
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add

No records were found.

Full Option

Run full publishing for entire network ☐

Members

Tools

	Member Code	Member Name	Active	Run Full Publishing
1	01CE_CC	Clark College	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	01CE_CONC	Concordia University	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	01CE_EWU	Eastern Washington University	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Tools

Cancel Save

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	<p>From the drop-down list, select one of the scheduling options that are predefined by an Ex Libris administrator.</p> <p>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).</p>
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	<p>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.</p> <hr/> <p>NOTE: The directory must be configured in advance because Alma cannot create it.</p> <hr/> <p>From the drop-down list, select the name of the S/FTP connection that you previously defined.</p>
Sub-directory	<p>The subdirectory in which the exported files are placed.</p> <p>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.</p>
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	<p>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.</p> <p>After you have entered the above mapping data, click Add to add the new mapping to the list.</p>
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	<p>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.</p> <hr/> <p>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</p> <hr/>

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.

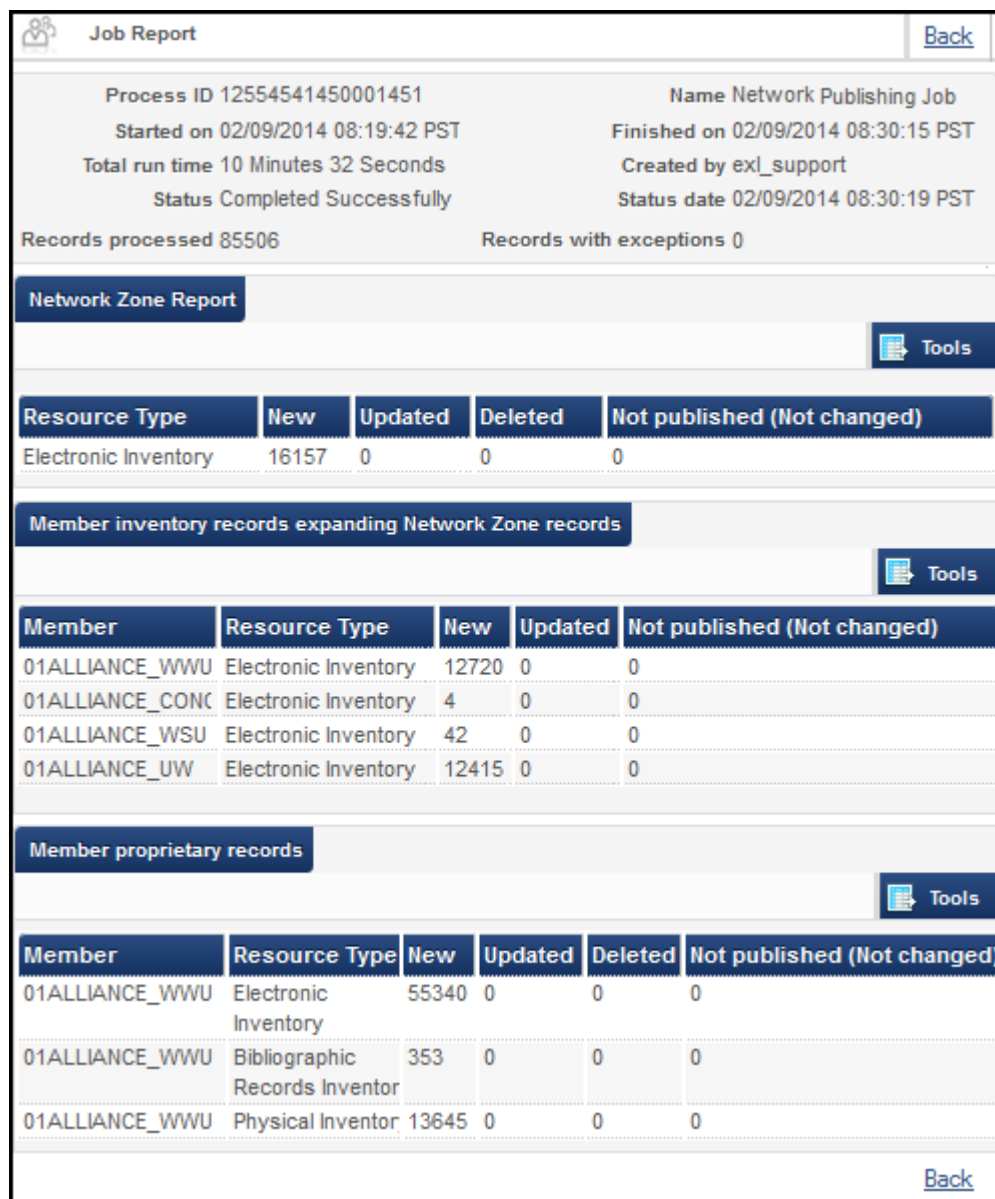


Figure 12: Network Publishing Job Report

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/ul_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.

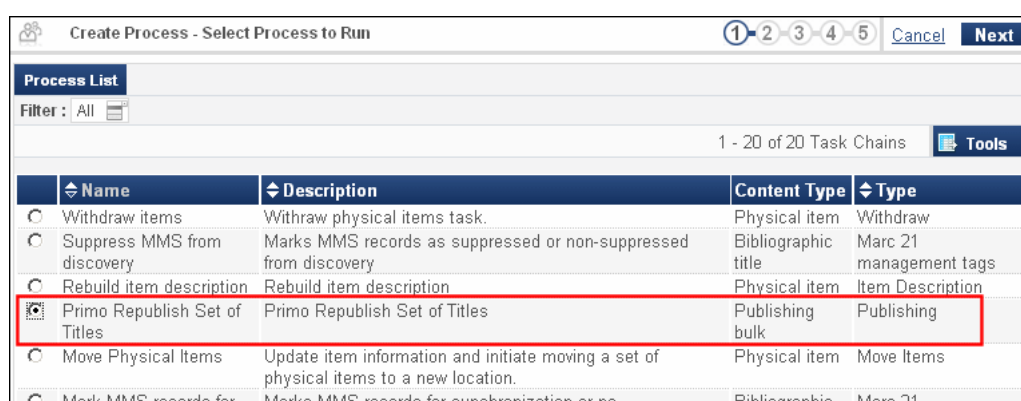


Figure 13: Selecting the Primo Republish Set of Titles Process

- 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.

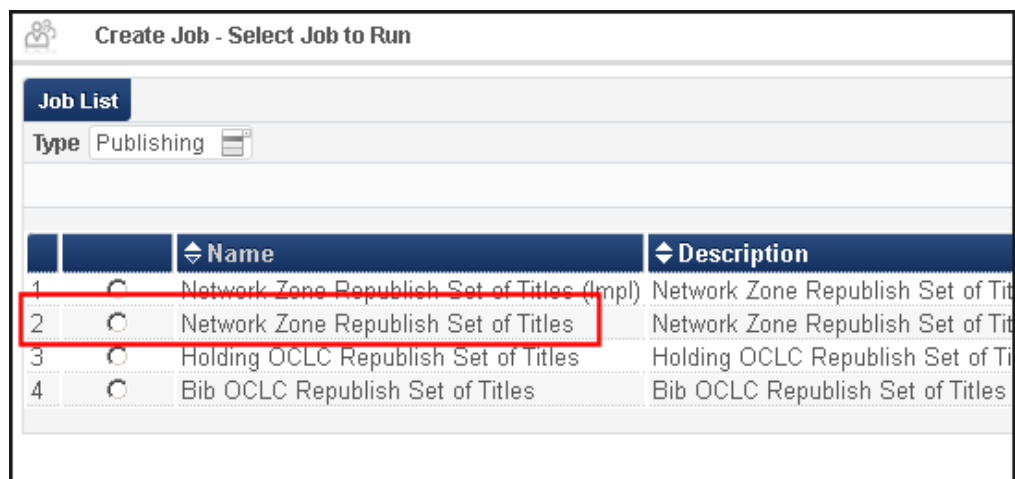


Figure 14: Selecting the NZ Republish Set of Titles Process

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.



		Name	Description
1	<input type="radio"/>	Mark records to be republished by NZ job (Impl)	Mark records to be republish
2	<input type="radio"/>	Mark records to be republished by NZ job	Mark records to be republish
3	<input type="radio"/>	Holding OCLC Republish Set of Titles	Holding OCLC Republish Set
4	<input type="radio"/>	Bib OCLC Republish Set of Titles	Bib OCLC Republish Set of T

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:

The screenshot shows the 'Mapping Table' configuration window for 'ExcludeProcessTypePublishing'. At the top, there are 'Cancel' and 'Customize' buttons. Below this, it states 'You are configuring: Main Campus' and provides a link to 'Organization Unit List'. The 'Table Information' section displays 'Sub System' as 'INVENTORY', 'Table Name' as 'ExcludeProcessTypePublishing', 'Updated By' as '-', and 'Last Updated' as '-'. The 'Table Description' is 'Process Types to Exclude from Publishing'. Below this is a section for 'Mapping Table Rows' which currently shows 'No records were found.' At the bottom, there is a 'Create a New Mapping Row' section with a 'Process Type' dropdown set to 'Acquisition' and an 'Exclude' dropdown set to 'False'. An 'Add Row' button is next to these fields. 'Cancel' and 'Customize' buttons are also present at the bottom right.

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:

Mapping Table Rows						Tools
Enabled	Process Type	Exclude	Updated By	Last Updated		
<input checked="" type="checkbox"/>	Claimed Returned	True	admin1	08/02/2013		Delete

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.

The screenshot shows the Primo interface for a book titled "The form of the book book" [edited by Sara De Bondt and Fraser Muggeridge] 2009. The book is available at the University Library Bozen-Bolzano 14-Reserve Collection (AN 34300). The 'Get It' tab is selected, and the 'Request Options' section shows the location and availability. Below this, a table displays the record details. The 'Description' column contains the text 'Additional location information: AN 34300 B711', which is circled in red.

Barcode	Type	Policy	Description	Status
04540977	Book	Not loanable	Additional location information: AN 34300 B711	Item in place

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**.

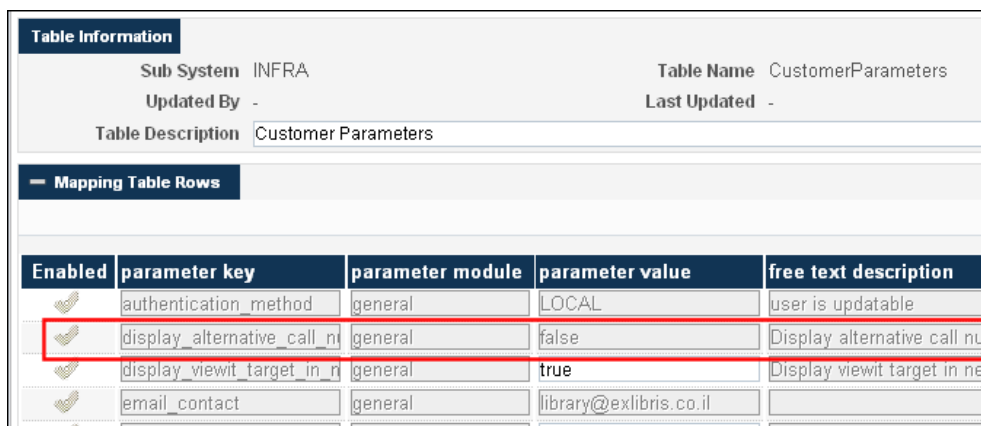


Table Information				
Sub System		INFRA	Table Name CustomerParameters	
Updated By		-	Last Updated -	
Table Description		Customer Parameters		
Mapping Table Rows				
Enabled	parameter key	parameter module	parameter value	free text description
	authentication_method	general	LOCAL	user is updatable
	display_alternative_call_number_in_getit	general	false	Display alternative call number in Primo
	display_viewit_target_in_next_page	general	true	Display viewit target in next page
	email_contact	general	library@exlibris.co.il	

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

- 1 – 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)
 - 1 – 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.

> Data Sources

Data Source Attributes

Source Description	Owner:	Volcano Island University	Source name:	ALMA-BC	Source code:	ALMA-BC
	Source format:	MARC21	Description:	Alma-BC	Original Source Code	01BC_INST
Source Definition	Source system:	Alma	Version			
	File Splitter:	OAI splitter	Character Set:	UTF-8	Input Record Path	record
	<input type="checkbox"/> File needs transformation	Transformation file name		XREF keys	LCCN	OCLC
					ISSN	ISBN

Created Aug 26, 2012, Last updated Aug 26, 2012 By Admin

Cancel & Go back To Data Sources List

Save & Continue To Data Sources List

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/avallibrary** – 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** on page 43
- **Removing the Locations Tab** on page 44
- **Configuring Primo Delivery of Alma Data and Services** on page 44
- **Configuring Real-Time Availability** on page 51
- **Collaborative Network Support** on page 56
- **Alma Multicampus Setup in Primo** on page 59
- **My Account** on page 62
- **A-Z List** on page 73
- **Citation Linker** on page 78
- **Direct Linking to the Resource Sharing Request Form** on page 81
- **Configuring Course Reserves in Primo** on page 83

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	The system uses the Almaviewit_remote template to request View it services from Alma.
		Remote Search Resource:Alma / fulltext_unknown	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	The system uses the Almagetit_remote template to request Get It services from Alma.
		Remote Search Resource:Alma / no_fulltext_linktorsrc	
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	The system uses the Almagetit_remote template to request additional services from Alma.
		Remote Search Resource:Alma / fulltext_linktosrc	
		Remote Search Resource:Alma / fulltext_unknown	
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.

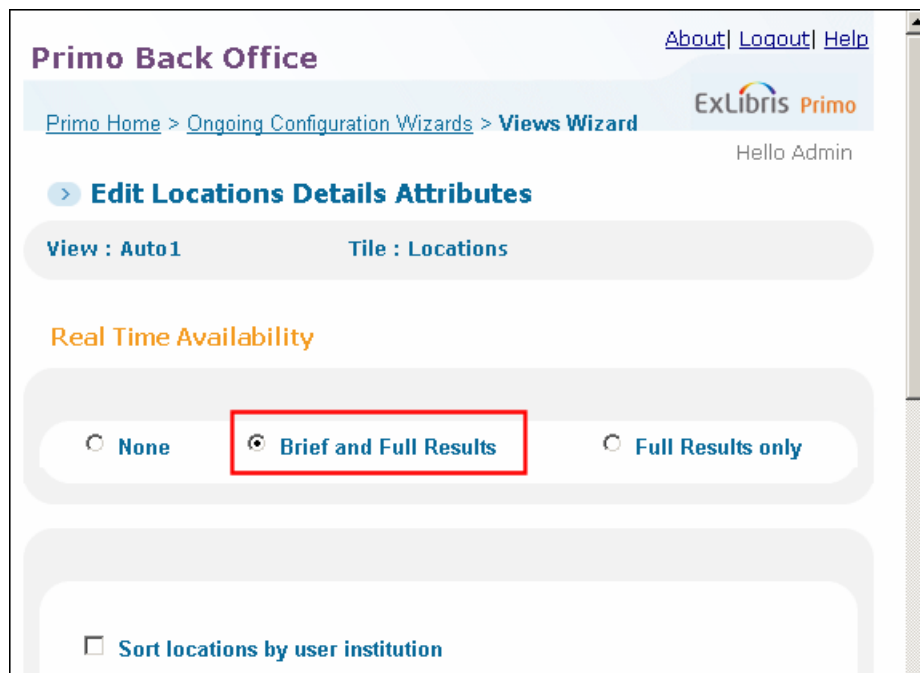
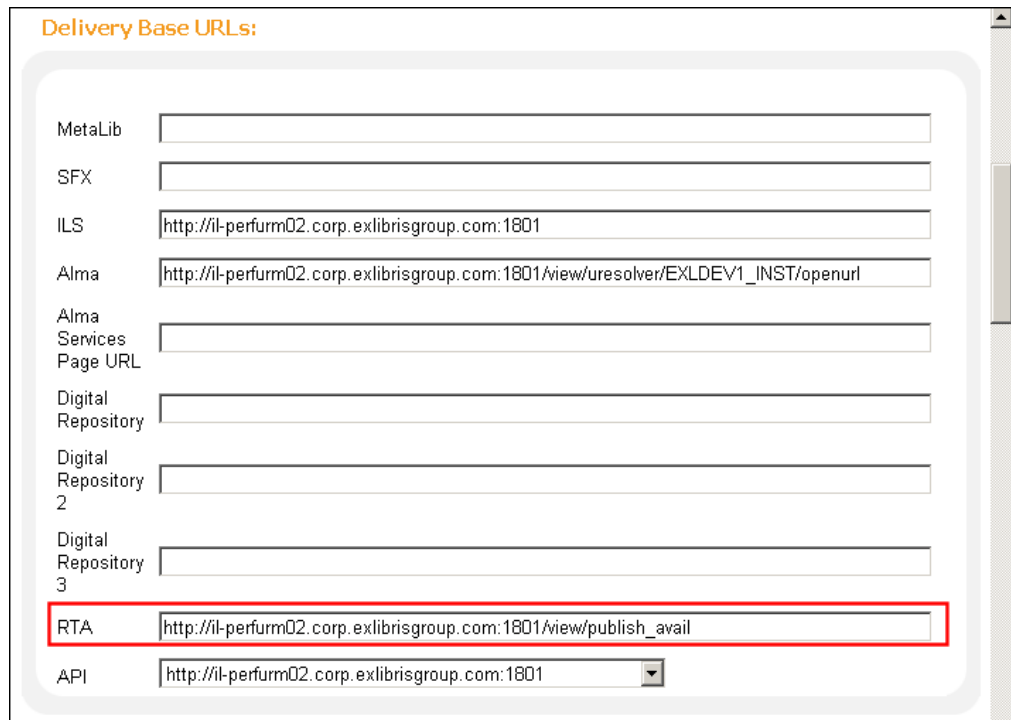


Figure 21: Locations Tile in the Views Wizard - Enable RTA

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



Delivery Base URLs:

MetaLib	<input type="text"/>
SFX	<input type="text"/>
ILS	<input type="text" value="http://il-perform02.corp.exlibrisgroup.com:1801"/>
Alma	<input type="text" value="http://il-perform02.corp.exlibrisgroup.com:1801/view/uresolver/EXLDEV1_INST/openurl"/>
Alma Services Page URL	<input type="text"/>
Digital Repository	<input type="text"/>
Digital Repository 2	<input type="text"/>
Digital Repository 3	<input type="text"/>
RTA	<input type="text" value="http://il-perform02.corp.exlibrisgroup.com:1801/view/publish_avail"/>
API	<input type="text" value="http://il-perform02.corp.exlibrisgroup.com:1801"/>

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**.

> **General Configuration**

Sub System : RTA

General Configuration of Sub System "RTA"

	Value	Last Updated
RTA method for mapping data	normalization_rules	09/06/11 by Primo
RTA Timeout	20	09/06/11 by Primo

Cancel & Go back 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**.

Mapping Table Rows

Enabled	Adaptor Identifier*	Key*	Value*
<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Voyager	Class	com.exlibris.primo.utils.rta.nmrt.VoyagerRtaAdaptor
<input type="checkbox"/>	Voyager	Class	com.exlibris.primo.utils.rta.voyager.VoyagerConcreteCo
<input type="checkbox"/>	Aleph	Class	com.exlibris.primo.utils.rta.AlephConcreteConnector
<input type="checkbox"/>	III	Class	com.exlibris.primo.utils.rta.iii.IIIMillenniumRTAAdaptor
<input checked="" type="checkbox"/>	Alma	Class	com.exlibris.primo.utils.rta.nmrt.AlmaRtaAdaptor
<input checked="" type="checkbox"/>	Aleph	Class	com.exlibris.primo.utils.rta.nmrt.AlephRtaAdaptor

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.

Mapping Table Rows

Enabled	Source System	Mapping Set Name	Data Source Code*	Active Y/N	Description
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Aleph	ALEPH MARC - Template	primo_aleph	Y	<input type="text"/>
<input type="checkbox"/>	Voyager	Voyager - Template	primo_voyager	N	<input type="text"/>
<input checked="" type="checkbox"/>	Alma	Alma MARC - Template	primo_alma	Y	<input type="text"/>
<input type="checkbox"/>	III	ALEPH MARC - Template	primo_other	N	<input type="text"/>

Table Description:

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=21273200690001021&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.

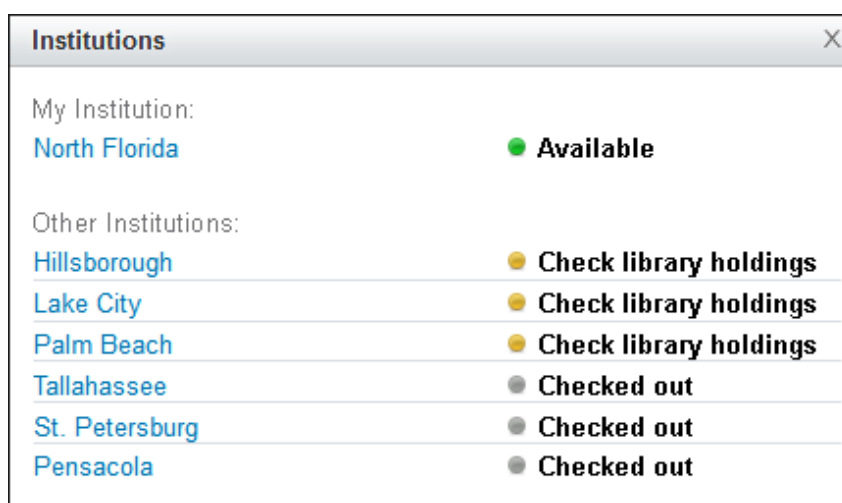


Figure 28: Institutions Lightbox

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:

Delivery Base URLs:

MetaLib	<input type="text"/>
SFX	<input type="text"/>
ILS	<input type="text"/>
Alma	<input type="text" value="http://alma1.exlibrisgroup.com/view/uresolver/01UNV_INST/openurl-NORTH"/>

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:

The screenshot shows the configuration for a normalization rule named 'delivery_institution'. The source is set to 'MARC' and the field is 'AVE'. The rule is configured to include subfield 'i,c'. The conditions are set to 'True'. The transformation section includes 'Copy As Is', 'Replace Spaces by String', and 'Use mapping table' with the parameter 'Campus Codes'. The action is set to 'ADD'.

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	<p>The Alma campus code has been added to the following templates:</p> <ul style="list-style-type: none">■ <code>almasingle_services</code>■ <code>almagetit_services</code>■ <code>almaviewit_services</code>. <p>For example:</p> <pre>{{api_base}}/view/uresolver/{{alma_institution}}/ openurl{{alma_campus_code}}?</pre>
ILS Adaptors Templates mapping table	<p>The Alma campus code has been added to the following template:</p> <ul style="list-style-type: none">■ <code>almasingle_services</code> <p>For example:</p> <pre>{{api_base}}/view/uresolver/{{institution}}/ openurl{{alma_campus_code}}?</pre>

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.

e-Shelf	Queries	My Account	My Databases
---------	---------	------------	--------------

North Library

Loans (5)

Requests (6)

Fine & Fees (1)

Blocks & Messages

Personal Settings

South Library

East Library

List of Active Loans

List of Historic Loans

#	Title	Author	Due Date	Due Hour	Fine	Location
1	تصورات اسلامية في التعليم الجامعي والبحث العلمي /	الاسد، ناصر الدين	05/15/2012	09:08		North Campus Main Library
2	التربية العربية :	بشور، منير	04/26/2011	11:39		North Campus Main Library
3	The history of Aleph in the western hemisphere.	Kortick, Yoel 1971-	04/26/2011	11:39		South Campus Library
4	An interdisciplinary study of library science in Chicago, Los Angeles, Ramat Aviv Gimmel and the south	Kortick, Yoel 1971-	04/26/2011	11:39		South Campus Library
5	Everything you always wanted to know about library software but were afraid to ask.	Kortick, Yoel 1971-	03/30/2011	11:39	20.00	South Campus Library

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.

My Preferences	
Address:	Jerusalem
Chernichovsky str	
Israel	
Zip:	340450459
Valid From:	10/28/2009
Valid To:	11/27/2009
Telephone 1:	23809
Telephone 4:	89081
Sms Wanted:	Y
SMS Number:	0509998887
My e-mail:	test@test.com

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.

My Preferences

Address:	Jerusalem
Chernichovsky str	
Israel	
Zip:	340450459
Valid From:	10/28/2009
Valid To:	11/27/2009
Telephone 1:	23809
Telephone 4:	89081
Sms Wanted:	Y
SMS Number:	0509998887
My e-mail:	test@test.com

Edit Details

Update Login Credentials

Pincode:	<input type="text"/>
Old Password:	<input type="text"/>
New Password:	<input type="text"/>

Update

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.

Queries						
My Account						
My Databases						
List of Fines:						
Fines Balance: -757.55				Pay Fine ↗		
#	Title	Author	Fine Date	Type	Amount	Transferred
1	Requiem.(Verdi)	Verdi, Giuseppe, 1813-1901	12/03/2014	Debit	(0.50)	No
2	Requiem.(Verdi)	Verdi, Giuseppe, 1813-1901	12/03/2014	Debit	(15.00)	No
3	The holy sonnets of John Donne	Britten, Benjamin, 1913-1976.	12/03/2014	Debit	(0.50)	No
4	The holy sonnets of John Donne	Britten, Benjamin, 1913-1976.	12/03/2014	Debit	(15.00)	No
5	Requiem.(Verdi)	Verdi, Giuseppe, 1813-1901	17/02/2014	Debit	(0.50)	No
6	Requiem.(Verdi)	Verdi, Giuseppe, 1813-1901	17/02/2014	Debit	(9.00)	No
7	The holy sonnets of John Donne	Britten, Benjamin, 1913-1976.	17/02/2014	Debit	(0.50)	No
8	The holy sonnets of John Donne	Britten, Benjamin, 1913-1976.	17/02/2014	Debit	(9.00)	No
9	The Sherlock Holmes journal.		14/02/2014	Debit	(0.00)	No
10	Requiem.(Verdi)	Verdi, Giuseppe, 1813-1901	14/02/2014	Debit	(0.50)	No
Fines Balance: -757.55				Pay Fine ↗		

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**.

Please check the items you want to pay for and click 'Continue' to proceed

Description of item(s) to pay	Total Cost
Total Library Payments	£30.25
Total to Pay Now	£30.25

Please click on Continue to proceed [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**.

Please click on Continue to proceed

Continue


* indicates a required field

Enter Credit / Debit Card Details

Card Type*     

Card Holder Name*

Card Number*

Card Security Code* 

Expiry Date (MMM/YYYY)*

Start Date (MMM/YYYY)

Please check the items you want to pay for and click 'Continue' to proceed

Description of item(s) to pay	Total Cost
Total Library Payments	£30.25
Total to Pay Now	£30.25

Please click on Continue to proceed

Continue

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

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

[Confirm your transaction](#)

Summary

Description of item(s) to pay	Total Cost
Total Library Payments	£30.25
Total to Pay Now	£30.25

Payment Information[Edit details](#)

Debit/Credit Card
Name on Card: Noga
Last 4 Digits of Card Number: 1111
Card Type:
VISA

Billing Address
1 Bills Dr.
Fourth Floor - Office
201
Orchard Park
NY
10203
UNITED STATES

Email confirmation will be sent to: **Noga@sgroup.com**.

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.

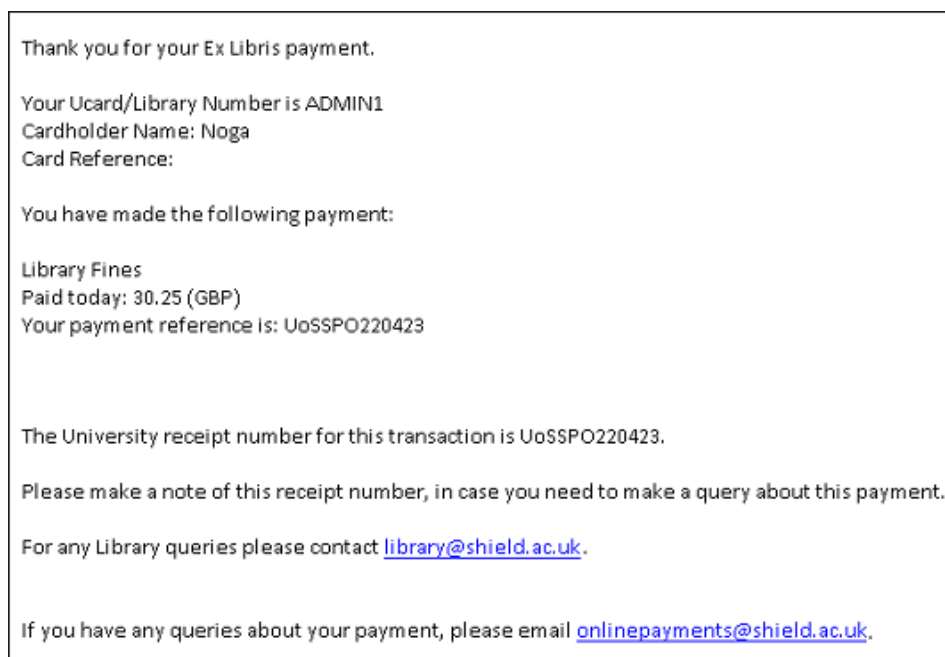


Figure 38: Sample WPM Education E-Payment System's Payment Receipt Email

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 **fin.es.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.

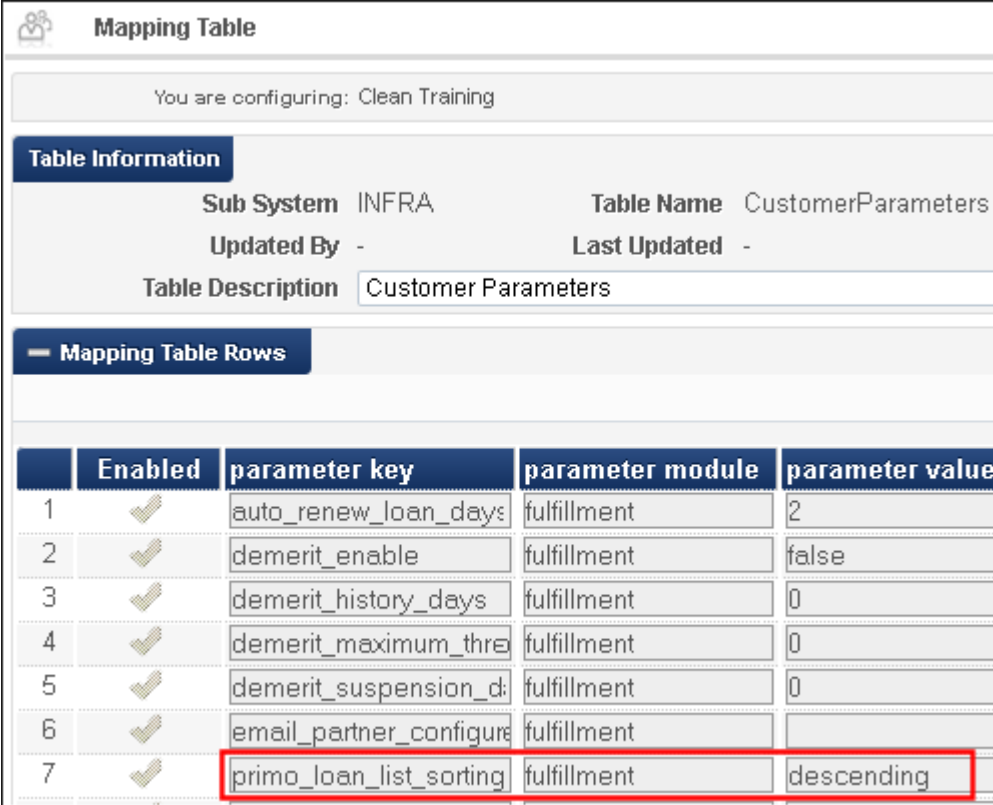
PERMISSIONS:

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.



Mapping Table

You are configuring: Clean Training

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
1	<input checked="" type="checkbox"/>	auto_renew_loan_days	fulfillment	2
2	<input checked="" type="checkbox"/>	demerit_enable	fulfillment	false
3	<input checked="" type="checkbox"/>	demerit_history_days	fulfillment	0
4	<input checked="" type="checkbox"/>	demerit_maximum_thre	fulfillment	0
5	<input checked="" type="checkbox"/>	demerit_suspension_d	fulfillment	0
6	<input checked="" type="checkbox"/>	email_partner_configur	fulfillment	
7	<input checked="" type="checkbox"/>	primo_loan_list_sorting	fulfillment	descending

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.

> Edit Main Menu Attributes

View : Auto1 Title : Main Menu

Interface Language: English

Contents of Main Menu Tile

Code:	library_search	Label:	Library Search	URL:	/action/se	Link should open in:	current window
Code:	tags	Label:	Tags	URL:	/action/ta	Link should open in:	current window
Code:	atoz	Label:	A-Z	URL:		Link should open in:	current window

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**:

Rule group: search_searchscope

Source: PNX, Value: delivery/institution, Enabled: ☒

Conditions logic: True, Conditions relation: And

Condition 1 - Logic: True

Condition 1 - Source: PNX, Value: delivery/delcategory, Success If: Match Last

Condition1 - Routines: Check that string exists, Parameter: Alma-E

Condition 2 - Logic: True

Condition 2 - Source: PNX, Value: display/type, Success If: Match Last

Condition2 - Routines: Check that string exists, Parameter: newspaper

Transformations:

Transformation: Copy As Is, Parameter:

Transformation: Add to beginning of string, Parameter: AZ

Behavior: Action: ADD

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**:

Rule group search_searchscope			
Source		Type	Value
PNX		PNX	delivery/institution
		<input checked="" type="checkbox"/> Enabled	
Conditions logic		Conditions relation	
Conditions + True		And	
Condition 1 - Logic True			
Condition 1 - Source		Type	Value
		PNX	delivery/delcategory
		Success If Match Last	
Condition 1 - Routines +		General Parameter	
		Routine	Parameter
		Check that string exists	Online Resource
Condition 2 - Logic True			
Condition 2 - Source		Type	Value
		PNX	display/type
		Success If Match Last	
Condition 2 - Routines +		General Parameter	
		Routine	Parameter
		Check that string exists	newspaper
Transformations +			
Transformation		Parameter	
Copy As Is			
Add to beginning of string		AZ	
Behavior			
Action		ADD	

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**:

Rule group search_searchscope			
Source	Type	Value	<input checked="" type="checkbox"/> Enabled
	PNX	delivery/delcategory	
Conditions logic		Conditions relation	
Conditions +	True	And	
Condition 1 - Logic True			
Condition 1 - Source	Type	Value	Success If
	PNX	delivery/delcategory	Match Current + -
Condition 1 - Routines +			
General Parameter			
Routine			
Check that string exists			
Parameter			
Alma-E\$\$I + -			
Condition 2 - Logic True			
Condition 2 - Source	Type	Value	Success If
	PNX	display/type	Match Last + -
Condition 2 - Routines +			
General Parameter			
Routine			
Check that string exists			
Parameter			
newspaper + -			
Transformations +			
Transformation		Parameter	
Copy As Is			
Remove Leading String		Alma-E\$\$I + -	
Add to beginning of string		AZ + -	
Behavior			
Action	ADD		

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**:

Rule group search_searchscope

Source PNX **Value** delivery/delcategory ☒ Enabled

Conditions logic True **Conditions relation** And

Condition 1 - Logic True

Condition 1 - Source PNX **Value** delivery/delcategory **Success If** Match Current

Condition 1 - Routines

General Parameter

Routine Check that string exists **Parameter** Online Resource\$\$I

Condition 2 - Logic True

Condition 2 - Source PNX **Value** display/type **Success If** Match Last

Condition 2 - Routines

General Parameter

Routine Check that string exists **Parameter** newspaper

Transformations

Transformation Copy As Is **Parameter**

Remove Leading String Online Resource\$\$I

Add to beginning of string AZ

Behavior

Action ADD

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).

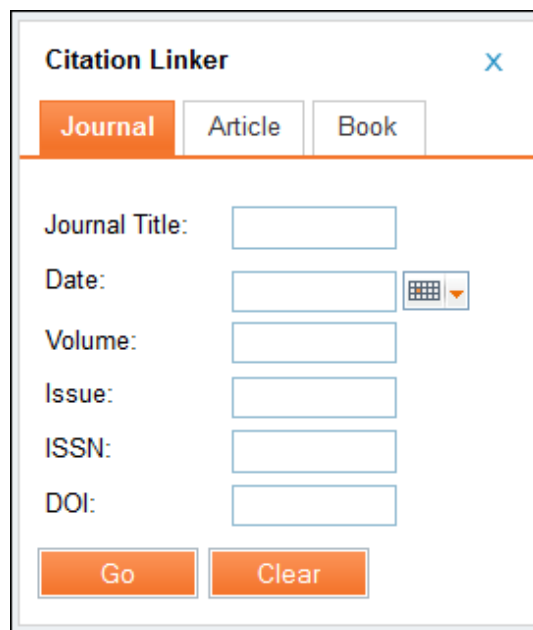


Figure 45: Citation Linker Lightbox - Journal Tab

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.

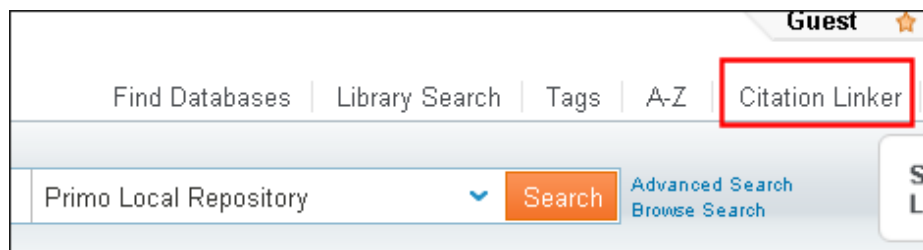


Figure 46: Citation Linker Button

The Citation Linker lightbox opens.

A screenshot of the 'Citation Linker' lightbox. It has a title bar with 'Citation Linker' and a close button. Below the title bar are three tabs: 'Journal', 'Article', and 'Book'. The 'Book' tab is selected and highlighted in orange. The form contains the following fields: 'Book Title' (Alma for librarians and), 'Date' (2013-05-30 with a calendar icon), 'Volume' (5), 'Part' (empty), 'ISBN' (248-365-613), 'Author Last Name' (Kortick), 'Author First Name' (Yoel), 'Author Initials' (YK), 'Publisher' (YLK Press), and 'Publication Date' (2013). At the bottom are two buttons: 'Go' and 'Clear'.

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.

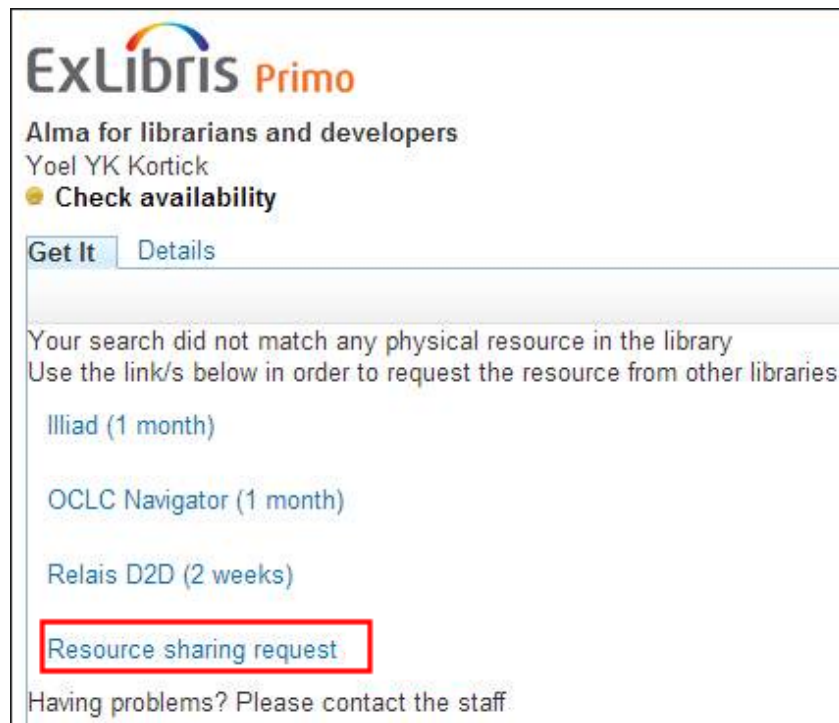


Figure 48: Get It Tab Request Links

- 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.

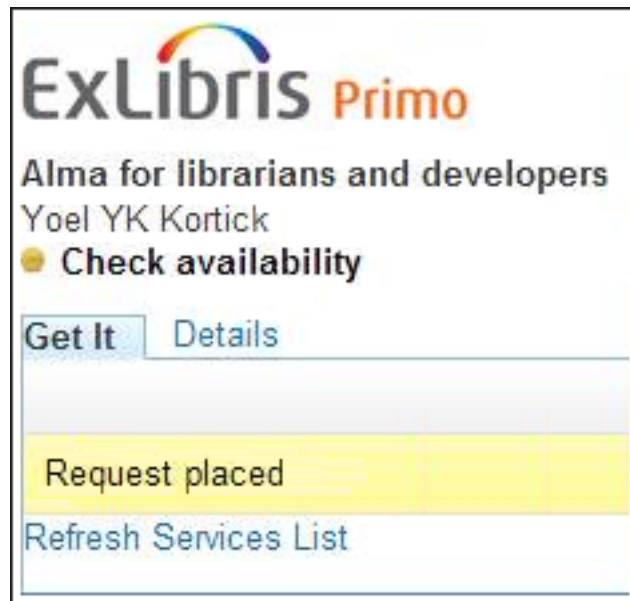


Figure 49: Request Acknowledgement Message

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://  
primol.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&directResourceSharingRequest=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:

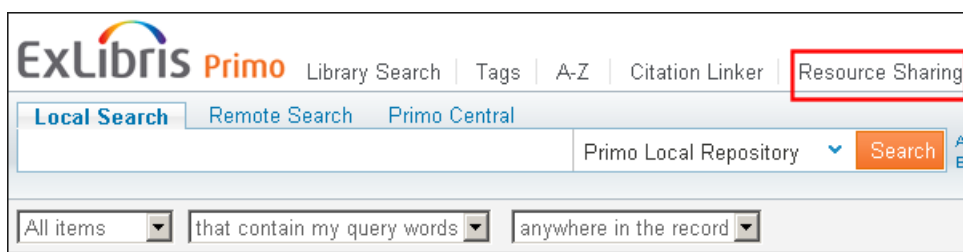


Figure 51: Resource Sharing Request Button Example

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.

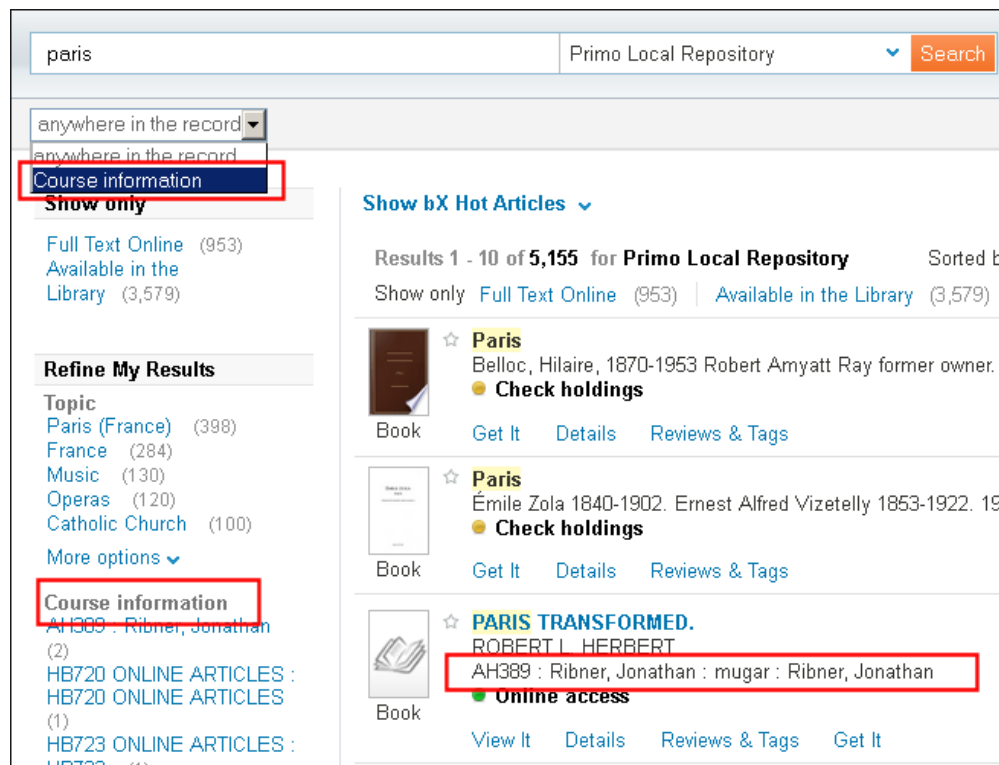


Figure 52: Course Reserves Enabled in the Front End

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.

Primo Back Office

[Primo Home](#) > [Advanced Configuration](#) > **Full Normalization Rule Configuration**

> **Manage Normalization Rules**

Normalization Rules Set: ☒ **Display Empty PNX fields** **PNX Section:**

Normalization Rules Set Attributes

Set Name: Set Description:
Version: 21 Enable: ☒

[Normalization Rules for PNX Section control in Normalization Rules set Alma](#)

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:

The screenshot displays the configuration interface for the 'display_ids01' rule group, showing four individual rule configurations (1, 2, 3, and 4). Each rule configuration includes the following fields:

- Rule group:** display_ids01
- Source:** MARC
- Field:** CNO
- Ind1:** (empty)
- Ind2:** (empty)
- Subfield:** k (for rule 1), j (for rule 2), i (for rule 3), g (for rule 4)
- Include:** (checked)
- Enabled:** (checked)
- Transformation:** Copy As Is
- Parameter:** (empty)
- Behavior:** ADD (for rule 1), MERGE (for rules 2, 3, and 4)
- First delimiter:** (empty)
- First delimiter Space:** Both
- Repeat Number:** (empty)
- Remaining delimiters:** (empty)
- Remaining delimiters:** None

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:

Rule group: search_searchscope

Type	Value	Enabled	
Source	Constant	MY_CR	<input checked="" type="checkbox"/> Enabled

Conditions logic

Conditions: True

Condition 1 - Logic: True

Condition 1 - Source	Type	Field	Ind1	Ind2	Subfield	Success If
	MARC	CNO			Include	k Match Any

Condition1 - Routines

General Parameter:

Routine: Input exists

Parameter:

Transformations

Transformation: Copy As Is

Parameter:

Behavior

Action: ADD

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:

Rule group

1

Type	Field	Ind1	Ind2	Subfield
MARC	CNO			Include j

Transformation Parameter

2

Type	Field	Ind1	Ind2	Subfield
MARC	CNO			Include k

Transformation Parameter

3

Type	Field	Ind1	Ind2	Subfield
MARC	CNO			Include o

Transformation Parameter

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:

The screenshot displays the 'PNX - Add Local Facets Field' configuration interface, showing two rule groups. The top rule group is labeled '1' and the bottom one is labeled '2'.

Rule group 1:

- Rule group: facets_lfc01
- Type: MARC
- Field: CNO
- Ind1:
- Ind2:
- Subfield: Include
- Subfield: k
- Enabled: ☒

Transformations:

- Transformation: Replace Characters
- Parameter: .@@^A
- Behavior: ADD

Rule group 2:

- Rule group: facets_lfc01
- Type: MARC
- Field: CNO
- Ind1:
- Ind2:
- Subfield: Include
- Subfield: j
- Enabled: ☒

Transformations:

- Transformation: Copy As Is
- Parameter:
- Behavior: MERGE
- First delimiter: |
- First delimiter Space: Both
- Repeat Number:
- Remaining delimiters:
- Remaining: None

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:

Primo Back Office

[Primo Home](#) > [Advanced Configuration](#) > **All Code Tables**

> **Code Tables**

Update for Owner: Installation **Sub System:** Front End

Table Name : FrontEnd Display Fields

Code Table Rows

Enabled	Field Code ▲▼	Field Name ▲▼	Language ▲▼	Display Order	De
<input checked="" type="checkbox"/>	Ids01	Course information	en_US	28	

Table Description: The display fields code values table

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:

Primo Back Office

[Primo Home](#) > [Advanced Configuration](#) > **All Code Tables**

> **Code Tables**

Update for Owner: Sub System:
Table Name :

Code Table Rows

Enabled	Field Code ▲▼	Field Name ▲▼	Language ▲▼	Dis Or
	<input type="text" value="Isr01"/>	<input type="text"/>	<input type="text" value="en_US"/>	
<input checked="" type="checkbox"/>	<input type="text" value="Isr01"/>	<input type="text" value="Course information"/>	<input type="text" value="en_US"/>	<input type="text" value="23"/>

Table Description:

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.

Primo Back Office

[Primo Home](#) > [Advanced Configuration](#) > [All Code Tables](#)

> **Code Tables**

Update for Owner: Sub System: Table Name:

Code Table Rows

Enabled	Code ▲▼	Description ▲▼	Language ▲▼	Display Order
	<input type="text" value="local"/>	<input type="text" value="Course"/>	<input type="text" value="en_US"/>	
<input checked="" type="checkbox"/>	<input type="text" value="default.facets.facet.facet_local1"/>	<input type="text" value="Course information"/>	<input type="text" value="en_US"/>	<input type="text" value="0"/>

Table Description:

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.

Primo Back Office

[Primo Home](#) > [Advanced Configuration](#) > [All Code Tables](#)

> **Code Tables**

Update for Owner: Sub System: Table Name:

Code Table Rows

Enabled	Field Names ▲▼	Field Codes ▲▼	Language ▲▼	Display Order
	<input type="text" value=""/>	<input type="text" value="Course"/>	<input type="text" value="en_US"/>	
<input checked="" type="checkbox"/>	<input type="text" value="facet_local1"/>	<input type="text" value="Course information"/>	<input type="text" value="en_US"/>	<input type="text" value="18"/>

Table Description:

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.

Primo Back Office

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Pipe Configuration Wizard](#) > **Scope Values Configuration**

> **Edit Scope**

General Attributes for Scope VOL_CR

Owner: Volcano Island University

Scope Value Name: VOL_CR

Scope Value Code: MY_CR

☐ **Manually defined Search Scope**

scope:(MY_CR)

Description:

Scope Type: Other

☐ **Shared by other Institutions**

Use Scope for: ☒ **Search** ☐ **Restricted Search** ☐ **Restricted Delivery**

Cancel & Go back **Save & Continue**

To Scope List To Scope List

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**:

Primo Back Office

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Views Wizard](#)

> Edit Search Scope

Scope: Interface Language:

General Attributes for Search Scopevolcano

Scope Name : Search Scope Description :

General:
Display Text:

Search Scope Values

	Type	Name
<input type="checkbox"/>	Institution	Primo Institution Scope
<input checked="" type="checkbox"/>	institution	Volcano Island University Scope
<input checked="" type="checkbox"/>	other	VOL_CR

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:

Primo Back Office [About](#) [Logout](#) [Help](#)

[Primo Home](#) > [Ongoing Configuration Wizards](#) > **Views Wizard** **ExLibris Primo**

Hello Admin

> Edit Full Details Attributes

View : Auto1 Tile : Full Results

Field to display in the full results

Field
Vernacular title
Title
Creator ; Contributor
Subject
Is Part Of
Description
Relation
Publisher
Creation Date
Format
Language
Course information

Fields' delimiter : ; Save Add Line

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.

Edit Facets Attributes

View : Auto1
Tile : Refine My Results (Facets)

Facets to display

Type	Items to Display	Sort		default_tab	
Topic	5	by_size	<input checked="" type="checkbox"/>	Delete	▲ ▼
Creator	5	by_size	<input checked="" type="checkbox"/>	Delete	▲ ▼
Collection	5	by_size	<input checked="" type="checkbox"/>	Delete	▲ ▼
Creation Date	5	none	<input checked="" type="checkbox"/>	Delete	▲ ▼
Resource Type	5	by_size	<input checked="" type="checkbox"/>	Delete	▲ ▼
Language	5	by_size	<input checked="" type="checkbox"/>	Delete	▲ ▼
Classification LCC	5	by_size	<input checked="" type="checkbox"/>	Delete	▲ ▼
Journal Title	5	alpha_numeric	<input checked="" type="checkbox"/>	Delete	▲ ▼
Course information	5	alpha_numeric	<input checked="" type="checkbox"/>	Delete	▲ ▼

Add new Facet to tile
Facet Type: Local Field13
Create

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](#) on page 97
- [Base_URL for the Services Page](#) on page 98
- [Description of the Services Page](#) on page 99
- [Configuring Delivery for the Services Page](#) on page 101
- [Configuring the OpenURL Link Action \(V4.9\)](#) on page 104

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.

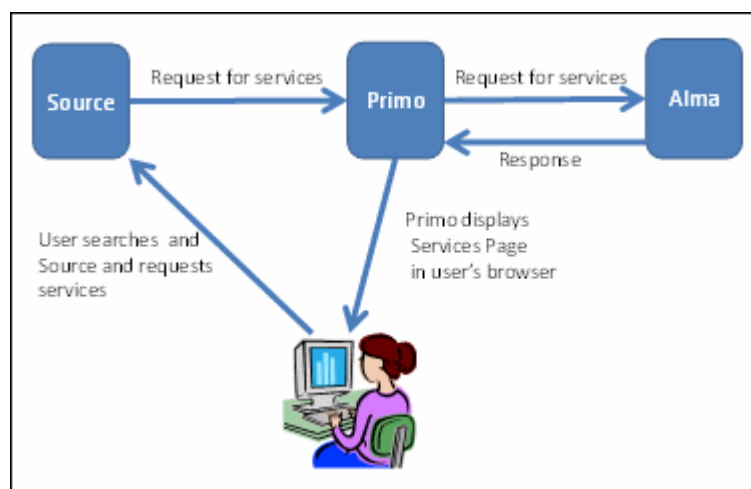


Figure 66: Alma Services Page Process Flow

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	<p>All are relevant except for the following attributes:</p> <ul style="list-style-type: none"> ■ 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	<p>The Brief Display uses the following options:</p> <ul style="list-style-type: none"> ■ 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 and Get 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	<p>The system uses the almaviewit_services template to request View It services from Alma.</p> <hr/> <p>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.</p> <hr/>
		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	<p>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:</p> <ul style="list-style-type: none">■ <code>default.fulldisplay.label.Openurl.link</code>■ <code>default.fulldisplay.command.link</code>■ <code>default.link.title.commands.Openurl</code>
CSS	<p>Out of the box, the Actions menu displays the Link option on the Alma Services page. You can disable this option by appending <code>{display: none;}</code> to the following line in your localized CSS file:</p> <pre>.EXLTabHeaderButtons ol.EXLTabHeaderButtonSendToList li.EXLButtonSendToOpenUrl {display: none;}</pre>

6

Configuring Alma's Delivery System

This section includes:

- **Introduction** on page 107
- **The Primo View It Tab** on page 108
- **The Primo Get It Tab** on page 108
- **Modifying Display Logic Rules** on page 113
- **Modifying Display Labels** on page 114
- **Configuring Related Records for Display in Primo** on page 114
- **Resolving Electronic Resources in the Network Zone** on page 114
- **Configuring Best Location** on page 118
- **Branding the Delivery Tabs** on page 119
- **Configuring the Delivery Tabs** on page 125
- **Adding Primo's Search Box to the Alma Home Page** on page 128
- **Adding a General Electronic Service** on page 133
- **Configuring the WPM Education E-Payment System in Alma** on page 139
- **Displaying Historical Loans in Primo** on page 143
- **Displaying License Information in the View It Tab** on page 143
- **Displaying Public Notes in the Primo Get It Tab** on page 145
- **Displaying Additional Holdings Information in the Primo Get It Tab** on page 147

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:

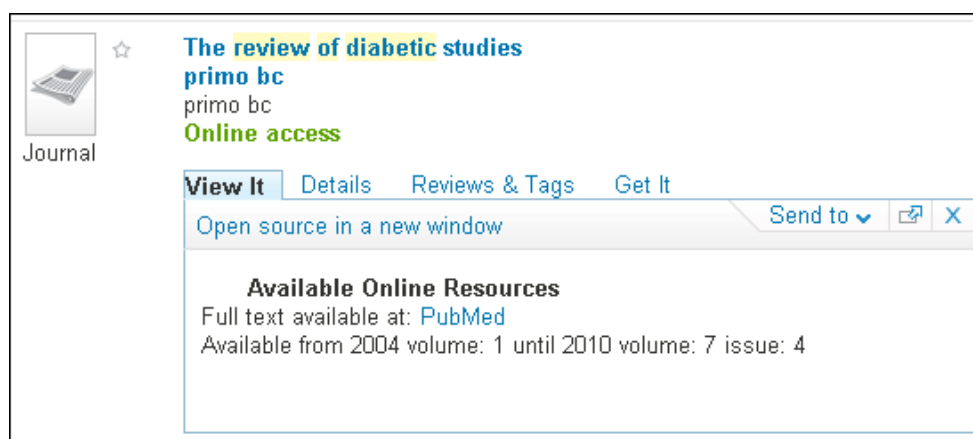


Figure 69: Example Electronic Resource

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:

The screenshot shows a web interface with tabs: 'Get It', 'Details', and 'Reviews & Tags'. The 'Get It' tab is active. Below the tabs, there are links for 'Request Options': 'Request', 'Digitization', 'ILiad (1 week)', 'NCIP (2 weeks)', and 'Resource sharing request'. Below this is a table with three columns: 'Location', 'Availability', and 'Location Map'.

Location	Availability	Location Map
Theology and Ministry Library Stacks BR115 .C3 W413 2009	(1 copy, 1 available)	Locate
O'Neill Open Stacks located in the main building BR115 .C3 W413 2009	(1 copy, 0 available)	Locate

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

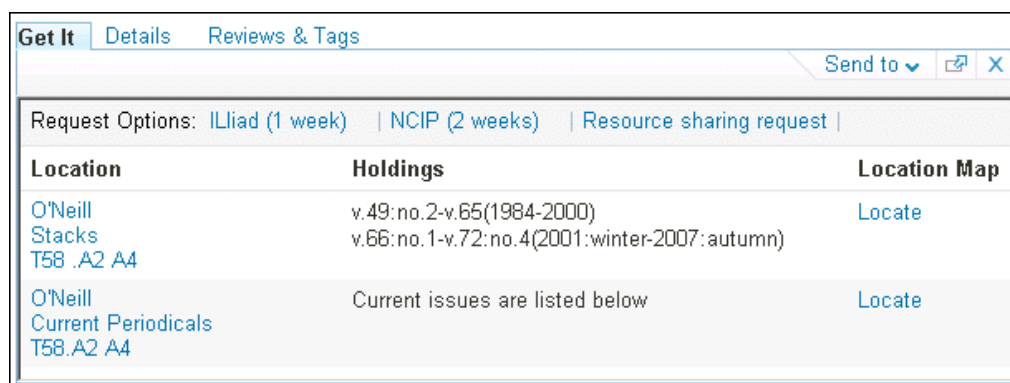
For serial titles, the following information is also included:

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

NOTE:

The availability information is omitted for serials.

For example:



The screenshot shows the 'Get It' tab interface. At the top, there are tabs for 'Get It', 'Details', and 'Reviews & Tags'. Below these is a 'Request Options' bar with links for 'ILiad (1 week)', 'NCIP (2 weeks)', and 'Resource sharing request'. The main content area is a table with three columns: 'Location', 'Holdings', and 'Location Map'. The first row shows 'O'Neill Stacks T58 .A2 A4' as the location, with holdings 'v.49:no.2-v.65(1984-2000)' and 'v.66:no.1-v.72:no.4(2001:winter-2007:autumn)', and a 'Locate' link. The second row shows 'O'Neill Current Periodicals T58.A2 A4' as the location, with the text 'Current issues are listed below' in the holdings column, and another 'Locate' link.

Location	Holdings	Location Map
O'Neill Stacks T58 .A2 A4	v.49:no.2-v.65(1984-2000) v.66:no.1-v.72:no.4(2001:winter-2007:autumn)	Locate
O'Neill Current Periodicals T58.A2 A4	Current issues are listed below	Locate

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:

Get It					Details	Reviews & Tags	Send to ▾	
Request Options: ILiad (1 week) NCIP (2 weeks) Resource sharing request								
Location		Educational Resource Center Stacks PZ7 .R79835 Ham 1999			Locate	Hide Details		
Availability:		(2 copies, 2 available)						
					1 - 2 of 2 Records			
Barcode		Type	Policy		Description		Status	
39031030009823			2 Hours				Item in place	
39031029981156			2 Hours				Item in place	
<div>◀ ▶</div>								

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:

Get It Details Reviews & Tags Send to ▼						
Request Options: ILiad (1 week) NCIP (2 weeks) Resource sharing request Back						
Location	O'Neill Stacks T58 .A2 A4			Locate	Show Details	
Year	<input type="text" value="All"/>	Volume	<input type="text" value="All"/>	Description	<input type="text" value="All"/>	Filter
1 - 5 of 5 Records						
Barcode	Type	Policy	Description	Status	Options	
39031030793202	Slide	14 Days	v.72(2007)	Item in place	Request Digitization	
39031030793210	Slide	14 Days	v.71(2006)	Item in place	Request Digitization	
39031030793228	Slide	14 Days	v.70(2005)	Item in place	Request Digitization	
39031029549771	Slide	14 Days	v.68-69(2003-2004)	Item in place	Request Digitization	
39031029549763	Slide	14 Days	v.66-67(2001-2002)	Item in place	Request Digitization	

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:

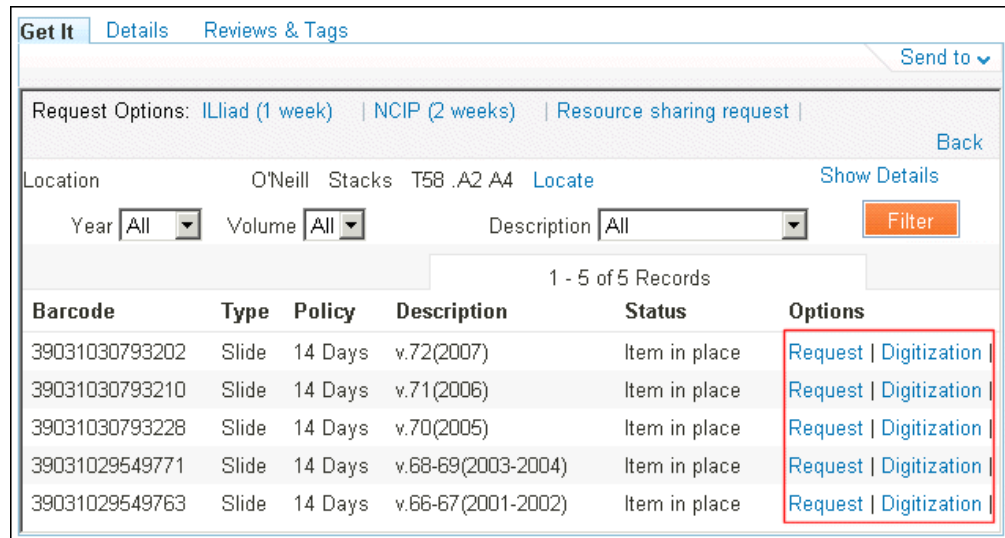


Figure 75: Get It Tab - Request Options in the Items List for Serials

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.

The screenshot shows the 'Repository Search' interface. At the top, there's a search bar with 'Find All titles' and 'where ISBN contains 0-231-12355-8'. Below this are tabs for 'Institution', 'Network', and 'Community'. A 'Limit results to:' section on the left includes 'Inventory' and links for 'Collection', 'Electronic title', 'Digital title', and 'Physical title'. The main results area shows a single entry: '1 The Defender of Peace' by Marsilius, of Padua, d. 1342?, (Harper & Row 1967). It lists the ISBN as 0-231-12355-8 and indicates availability: 'Electronic version at AC Humanities eBook: Full Text'. Links for 'Edit', 'Order', and 'View It' are provided.

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.

The screenshot shows the 'Citation Linker' form with the 'Book' tab selected. The form contains the following fields: 'Book Title' (The defender of peace), 'Date' (empty), 'Volume' (empty), 'Part' (empty), 'ISBN' (0-231-12355-8), 'Author Last Name' (empty), 'Author First Name' (empty), 'Author Initials' (empty), 'Publisher' (empty), and 'Publication Date' (empty). At the bottom are 'Go' and 'Clear' buttons.

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

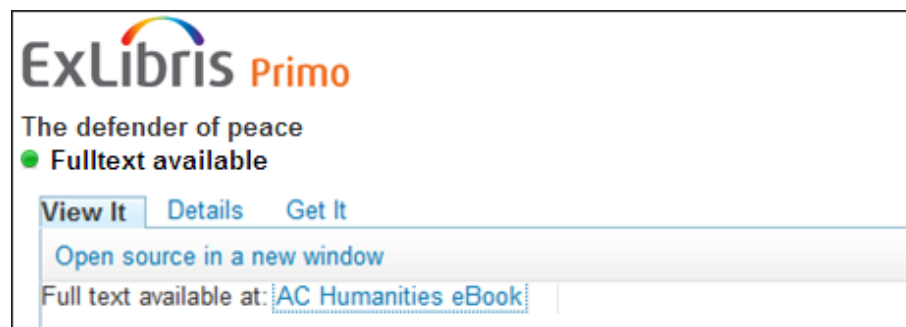


Figure 78: Electronic Services Displayed in the View It Tab

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 multiple 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.

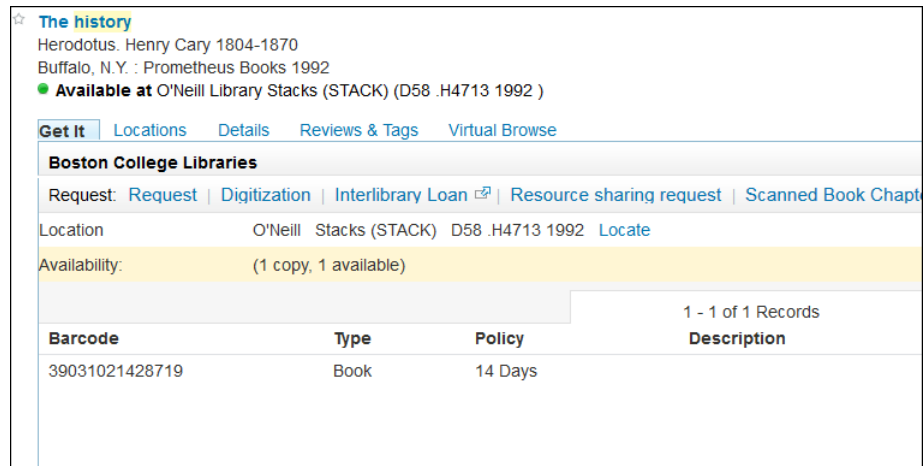


Figure 79: Primo Get It Tab

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

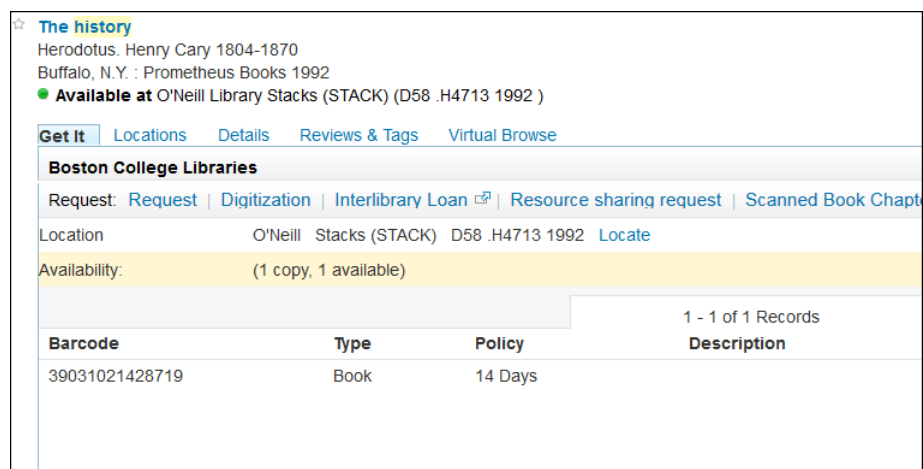
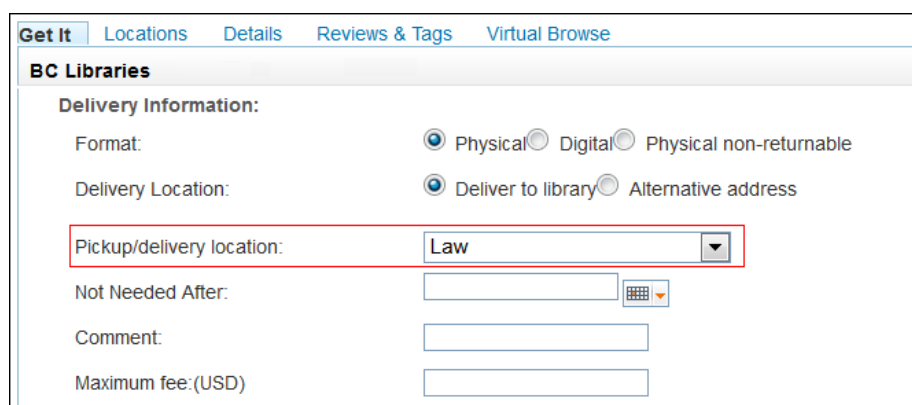


Figure 80: Primo Get It Tab – Multiple Resource Sharing Libraries

- 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.



The screenshot shows the 'Get It' tab in the Alma Primo interface. The 'Delivery Information' section is visible, containing several fields. The 'Pickup/delivery location' field is highlighted with a red rectangular box and shows a dropdown menu with 'Law' selected. Other fields include 'Format' (Physical, Digital, Physical non-returnable), 'Delivery Location' (Deliver to library, Alternative address), 'Not Needed After' (calendar icon), 'Comment' (text input), and 'Maximum fee:(USD)' (text input).

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.



The screenshot shows a web interface for the 'Locations Ordering Profile'. The top section has a title bar with a user icon, the text 'Locations Ordering Profile', and 'Cancel' and 'Save' buttons. Below this is a form area with a label 'Use "IP best location" sorting' followed by radio buttons for 'No' (selected) and 'Yes'. At the bottom right of the form area are 'Cancel' and 'Save' buttons.

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.

The screenshot shows a web form titled "Add a Skin". At the top right of the form are "Cancel" and "Save" buttons. The form is divided into two main sections. The first section, "Skin Details", contains a "Skin name" field with the text "My Skin" and a "Skin description" text area. The second section, "Skin Zip File", contains a "Download Default Zip file" link and a file upload field. The file upload field has a folder icon and the text "Myskin.zip". Below the file upload field is a note: "Please submit a zip file containing all the images and css". At the bottom right of the form are "Cancel" and "Save" buttons.

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.

The screenshot shows the 'Add a Skin' form. At the top, there's an 'Add a Skin' header with 'Cancel' and 'Save' buttons. Below it is the 'Skin Details' section with a 'Skin name' field (marked with a red asterisk) and a 'Skin description' text area. The 'Skin Zip File' section has a 'Download Default Zip file' link and a required field for a zip file, with instructions: 'Please submit a zip file * containing all the images and css'. 'Cancel' and 'Save' buttons are at the bottom right.

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.

Mapping Tables

Update for Owner: PrimoQA
Sub System : Delivery
Table Name : Templates

Mapping Table Rows

Enabled	Code*	Template Code
	alma	
<input checked="" type="checkbox"/>	Almagetit_remote	{{alma_base}}?ctx_enc=info:ofi/enc:UTF-8&ctx_id=10_1&c
<input checked="" type="checkbox"/>	Almasingle_service_remote	guage={{language}},view={{view}}&svc_dat=single_service
<input checked="" type="checkbox"/>	almasingle_services	titution}}/openurl{{alma_campus_code}}?ctx_enc=info:ofi/e
<input checked="" type="checkbox"/>	almagetit_services	{{view}}&svc_dat=getit&svc.profile=getit&user_ip={{userlp}}
<input checked="" type="checkbox"/>	almaviewit_services	anguage}},view={{view}}&svc_dat=viewit&svc.profile=viewit
<input checked="" type="checkbox"/>	Almaviewit	viewit&u.ignore_date_coverage=true&req.skin=MY%20Skin
<input checked="" type="checkbox"/>	Almagetit	}}&svc_dat=getit&user_ip={{userlp}}&req.skin=MY%20Skin
<input checked="" type="checkbox"/>	Almasingle_service	w}}&svc_dat=single_service&u.ignore_date_coverage=true
<input checked="" type="checkbox"/>	Almaviewit_remote	id}}>,language={{language}},view={{view}}&svc_dat=viewit

Table Description: Link templates

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.

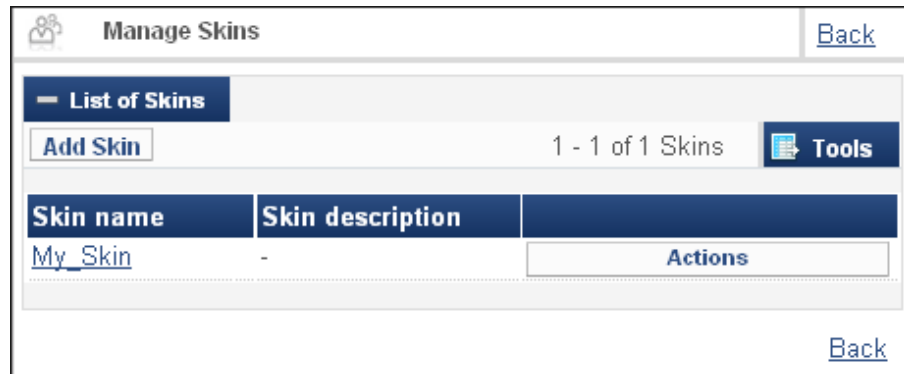


Figure 87: Manage Skins Page

- 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.

The screenshot shows the 'External System' configuration window. At the top, there are 'Cancel' and 'Save' buttons. Below is a header section with 'External System' and a table with columns: Code, Name, Discovery Interface, Integration Type, and Discovery Interface. The 'Integration Type' is set to 'Discovery Interface'. Below the header are three tabs: 'General Information', 'Actions', and 'Contact Info'. The 'Actions' tab is selected, showing a 'General Information' section with a 'URL template' field containing a complex URL with placeholders. Below this are two dropdown menus: 'Supported libraries' (with options: Art Library, Education Library, Law Library, Main Library) and 'Excluded locations' (with options: Main Library, Abstracts, Archive). At the bottom right of the 'Actions' section are 'Cancel' and 'Save' buttons.

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.

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	Upd
	authentication_r	general	LOCAL	user is updatable	-
	display_viewit_t	general	true	Display viewit target i	-
	email_contact	general	library@exlibris.ci		-
	email_contact_u	general	http://		-
	email_deposit_c	general	library@exlibris.ci		-
	email_deposit_s	general	Management Dep		-
	email_my_acco	general	http://		-
	email_sender	general			-
	page_size	general	20		-
	primo_patron_in	general	N	user is updatable	-
	primo_pds_url	general		user is updatable	-
	primo_service_p	general			-
	res_discovery_u	general			-

Figure 90: General Configuration - Customer Parameters

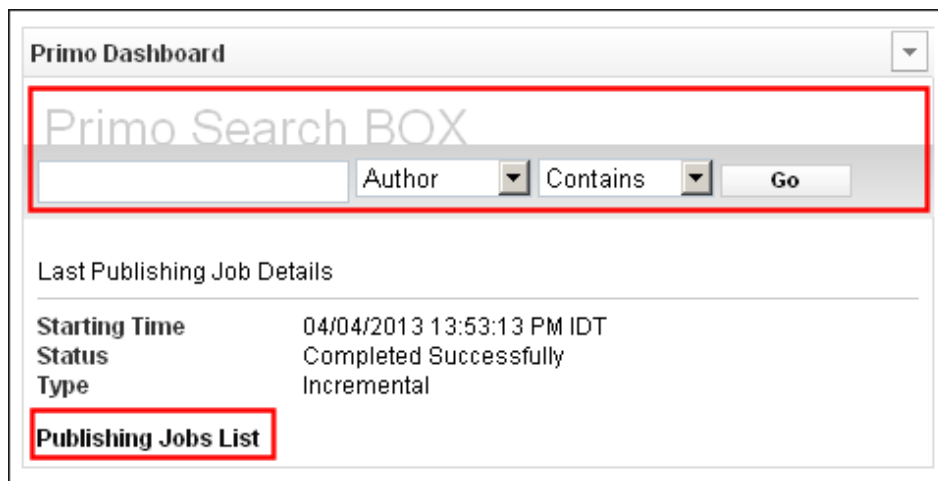
- **primo_service_page_url** – This parameter configures the base URL that is used to receive a service page direct link to the title when using the Alma Course Information Web service. The parameter should contain the base URL of the Services Page view ID (vid) that is defined in Primo. For example:

```
http://bc-primo.hosted.exlibrisgroup.com/openurl/BCL/
services_page?dscont=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.



Last Publishing Job Details	
Starting Time	04/04/2013 13:53:13 PM IDT
Status	Completed Successfully
Type	Incremental

[Publishing Jobs List](#)

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.

The screenshot shows the 'Code Table' configuration page for 'Primo Widget Search Fields'. The page is titled 'Code Table' and has 'Cancel' and 'Save' buttons at the top right. Below the title, it says 'You are configuring: Main Campus'. The 'Table Information' section shows 'Sub System: INFRA', 'Table Name: Primo Widget Search Fields', 'Updated By: exl_impl', 'Updated on: 26/12/2012', and 'Table Description: Primo Widget Search Fields'. Below this is a section titled 'Primo Widget Search Fields' with an 'Import' button and a 'Tools' button. A table lists the search fields:

Enabled	Display	Order	Code	Description	Default Value	Updated By	Last Updated	
<input checked="" type="checkbox"/>			title	Title	<input type="radio"/>	exl_impl	26/12/2012	Delete
<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		creator	Author	<input checked="" type="radio"/>	exl_impl	26/12/2012	Delete
<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		sub	Subject	<input type="radio"/>	exl_impl	26/12/2012	Delete
<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		any	Anywhere	<input type="radio"/>	exl_impl	26/12/2012	Delete

Below the table is a section titled 'Create a New Code Table Row' with fields for 'Code', 'Description', and 'Default Value' (set to 'No'). There is an 'Add Row' button. At the bottom right are 'Cancel' and 'Save' buttons.

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.

Code Table

[Cancel](#)
[Customize](#)

You are configuring: Main Campus

Table Information

Sub System

INFRA

Table Name

Primo Widget Search Precision

Updated By

-

Updated on

-

Table Description

Primo Widget Search Precision

Primo Widget Search Precision

Enabled	Display	Order	Code	Description	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>			contains	Contains	<input checked="" type="radio"/>	-	-
<input checked="" type="checkbox"/>			exact	Exact	<input type="radio"/>	-	-

Create a New Code Table Row

Code

Description

Default Value

No

[Add Row](#)

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.

Code Table Cancel Save

You are configuring: Main Campus

Table Information

Sub System	INFRA	Table Name	Primo Widget Configuration
Updated By	exl_impl	Updated on	25/12/2012
Table Description	Primo Widget Configuration		

Primo Widget Configuration

Import

	Display	Order	Code	Description	Default Value
1	<input type="checkbox"/>	<input type="text"/>	primo_search_box ti	Primo Search Box	<input type="radio"/>
2	<input type="checkbox"/>	<input type="text"/>	primo_search_box u	http://	<input type="radio"/>

Figure 94: Primo Widget Configuration Page

- 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.

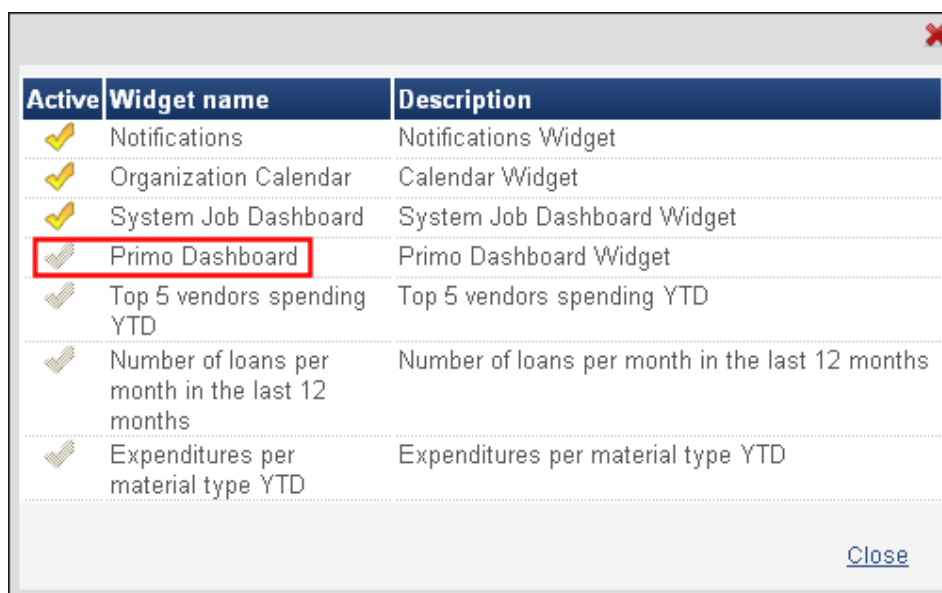


Figure 95: Add Widget Lightbox

- 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.

Add Service

Service Code * Amazon

Service Name * Amazon

Service Description

Public Name Amazon

Public Note Search for your book

Display Location * Viewit

URL Template * b_sb_ss_c_0_12?url=search-alias%3Dstripbooks&field-keywords={rft.isbn}

[Close](#) **Add** **Add and Close**

Figure 97: Add Service Dialog Box

4 Enter the following service information:

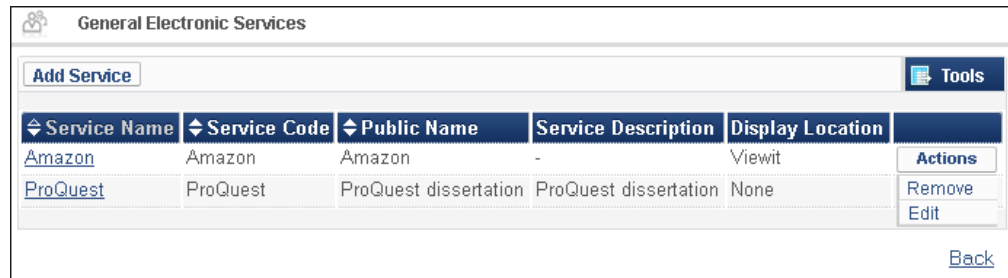
- **Service Code** – The internal code for the service.
- **Service Name** – The internal name used for the service.
- **Service Description** – The description of the service.
- **Public Name** – The label for the link that displays in the Primo View It and/or Get It tabs.
- **Public Note** – The note 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**.

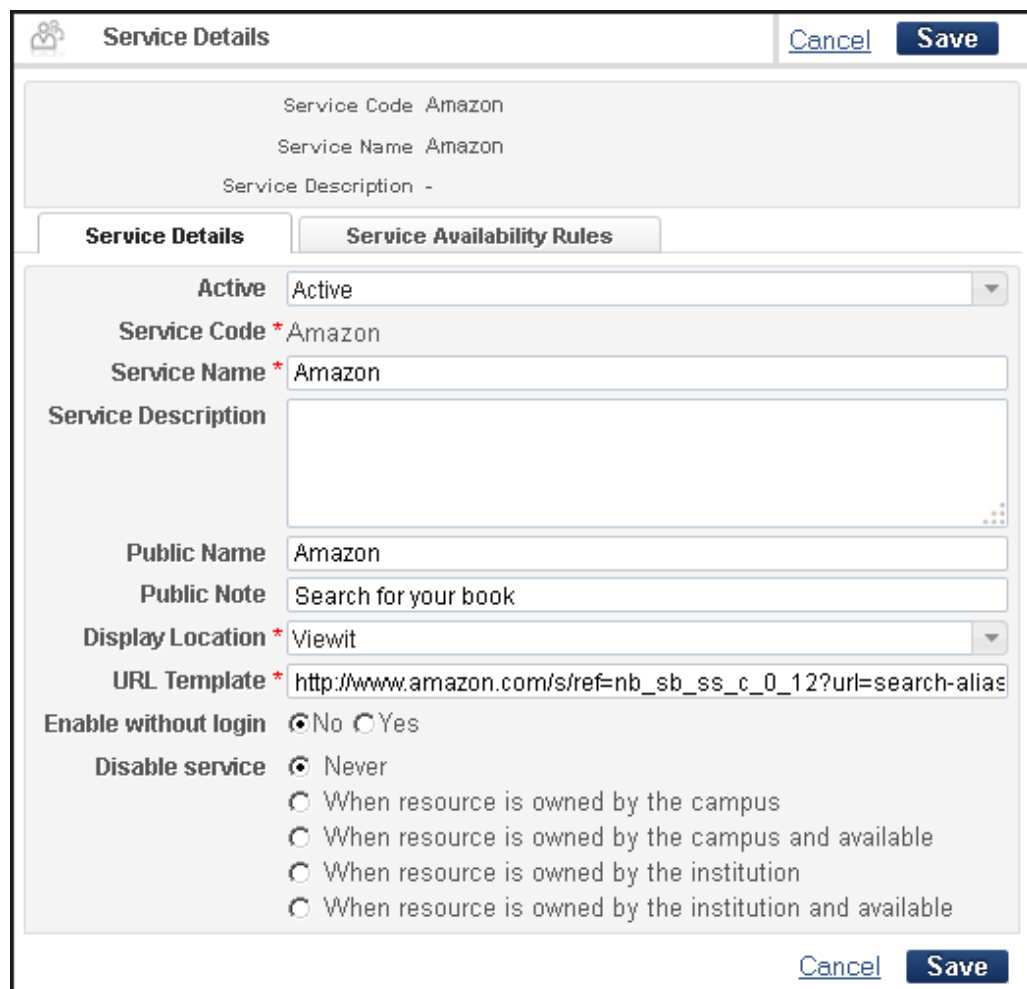
The new service displays on the General Electronic Service page with the following action options: **Remove** and **Edit**.



Service Name	Service Code	Public Name	Service Description	Display Location	Actions
Amazon	Amazon	Amazon	-	Viewit	Actions
ProQuest	ProQuest	ProQuest dissertation	ProQuest dissertation	None	Remove Edit

Figure 98: Electronic Service Added

- Click **Actions > Edit** to configure additional service details.
The Service Details page opens.



Service Code: Amazon
Service Name: Amazon
Service Description: -

Service Details | **Service Availability Rules**

Active: Active

Service Code *: Amazon
Service Name *: Amazon
Service Description:
Public Name: Amazon
Public Note: Search for your book
Display Location *: Viewit
URL Template *: http://www.amazon.com/s/ref=nb_sb_ss_c_0_12?url=search-alias
Enable without login: ☒ No ☐ Yes
Disable service: ☒ Never
☐ When resource is owned by the campus
☐ When resource is owned by the campus and available
☐ When resource is owned by the institution
☐ When resource is owned by the institution and available

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.

The screenshot shows the 'Service Availability Rules' tab for the 'Amazon' service. At the top, there are fields for 'Service Code' (Amazon) and 'Service Name' (Amazon), with a 'Service Description' field below them. Below these fields are two tabs: 'Service Details' and 'Service Availability Rules', with the latter being selected. Under the 'Service Availability Rules' tab, there is a 'Filter' dropdown set to 'All' and an 'Add Rule' button. Below this, a message states 'No records were found.' At the bottom, there is a 'Default Rule' section with a link to 'Default general electronic services rule' and an 'Edit' button, which is highlighted with a red box. 'Cancel' and 'Save' buttons are located at the top right and bottom right of the form.

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.

Edit rule [Cancel] [Save]

Edit rule

Name * ISBN
Description ISBN is required
Created By - Created On 08/24/2013
Updated By - Updated On 08/24/2013

Input Parameters [Tools]

Name	Operator	Value
rft.isbn	Is Not Empty	-

[Delete]

Name Operator Value
[] [] [Possible Values >] [] [Add Parameter]

Output Parameters

Name	Result
IsDisplay	* True

[Cancel] [Save]

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.

The screenshot shows the 'External System' configuration page. At the top, there's a header with 'External System' and navigation buttons 'Cancel' and 'Next'. Below this is a table with columns 'Code', 'Name', and 'Integration Type'. The table contains one row with the following values: Code: 'WPM', Name: 'WPM Education', Integration Type: 'Online Payment'. Below the table, there's a section for 'System (for Ex Libris' informational purposes)' with a dropdown menu set to 'WPM Education'. There's also a 'Default' checkbox which is unchecked. A 'Description' field is present but empty. At the bottom, there are 'Created By' and 'Updated By' fields, both showing 'Ex Libris (30/07/2013)'. The page ends with 'Cancel' and 'Next' buttons.

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.

External System

1 2 Back Cancel Save

Code	Name	Integration Type
WPM	WPM Education	Online Payment

Actions

Fines and Fees Payment Type

Fines and Fees Payment Type

Back Cancel Save

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.

External System

Code	Name	Integration Type
WPM Education	WPM Education	Online Payment

Actions

Fines and Fees Payment Type
Fines and Fees Payment Type: WPM Education

WPM Education Definitions

System URL *

Redirect URL

Client Id *

Pathway Id *

Department Id *

Shared Secret *

Email From *

Email Footer

Vat Code *

Vat Description *

Payments custom field 1 <input type="text"/>	Payment custom field 1 <input type="text"/>
Payments custom field 2 <input type="text"/>	Payment custom field 2 <input type="text"/>
Payments custom field 3 <input type="text"/>	Payment custom field 3 <input type="text"/>
Payments custom field 4 <input type="text"/>	Payment custom field 4 <input type="text"/>
Payments custom field 5 <input type="text"/>	Payment custom field 5 <input type="text"/>
Payments custom field 6 <input type="text"/>	Payment custom field 6 <input type="text"/>
Payments custom field 7 <input type="text"/>	Payment custom field 7 <input type="text"/>
Payments custom field 8 <input type="text"/>	Payment custom field 8 <input type="text"/>
Payments custom field 9 <input type="text"/>	Payment custom field 9 <input type="text"/>
Payments custom field 10 <input type="text"/>	Payment custom field 10 <input type="text"/>

[Back](#) [Cancel](#) [Save](#)

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).

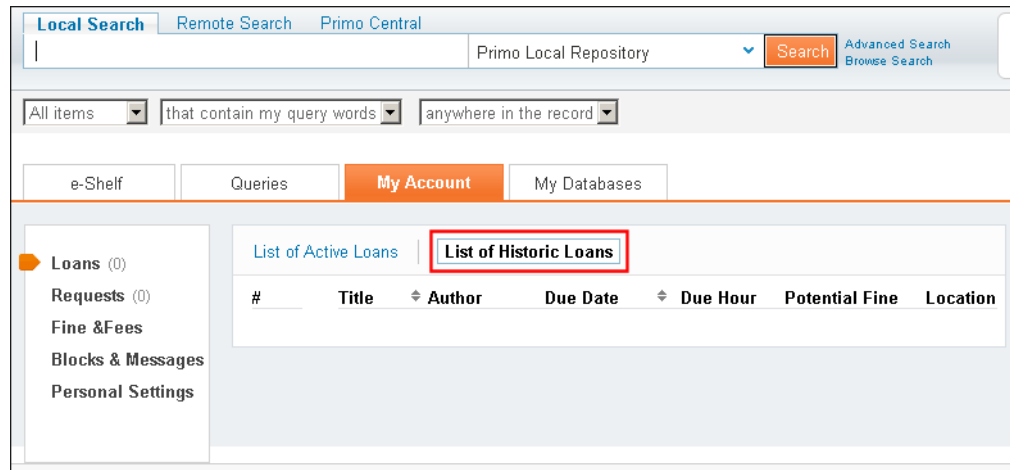


Figure 106: List of Historical Loans

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:

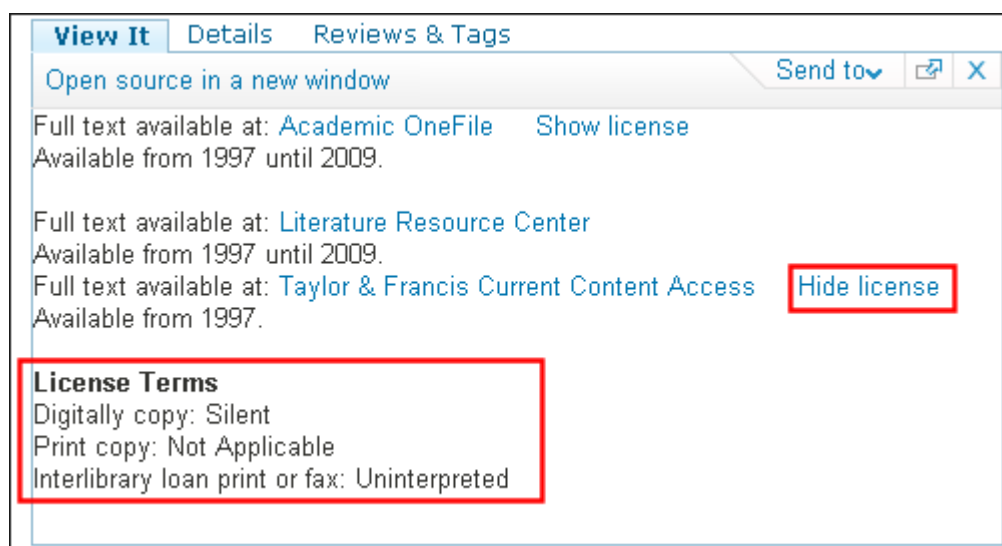


Figure 108: License Terms Displayed in View It Tab

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.

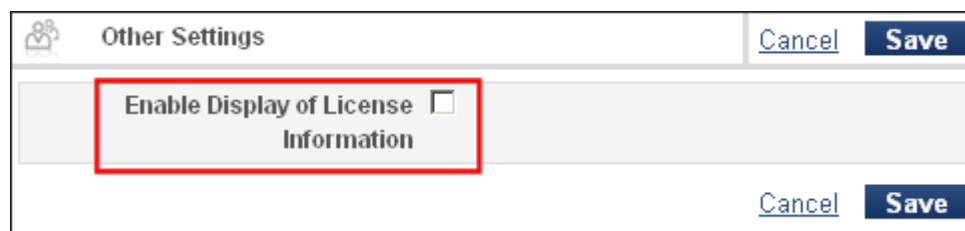


Figure 109: Other Settings Page under Fulfillment Configuration

- 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.

Request Options: Interlibrary Loan Resource sharing request		
Year All	Volume All	Description All
Location	Holdings	Location Map
Law Periodicals No Loan J	v.72-78 (2000-2006)	
Law Microform No Loan Hein's bar journal service	v.72-80 (2000-2008) v.81: no. 5 (2009: June) Note: Library no longer subscribes to this title in microfiche. Available online.	
Neill Stacks (STACK) K14 .E963	Supplementary Material: my supplementary material, Indexes: my indexes,	Locate

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.

Request Options: [Interlibrary Loan](#) | [Resource sharing request](#)

Location Law Microform No Loan Hein's bar journal service

Year All

Volume All

Description All

1 - 5 of 5 Records

Barcode	Type	Policy	Description	Status	Options
912641-1580	Issue	120 Days	v.81: no. 5 (2009: June)	Item in place	Request
912641-1570	Issue	120 Days	v.81: no. 4 (2009: May) Note: Special item	Item in place	Request
912641-1560	Issue	120 Days	v.81: no. 3 (2009: Mar./Apr.)	Item in place	Request
912641-1550	Issue	120 Days	v.81: no. 2 (2009: Feb.)	Item in place	Request
912641-1540	Issue	120 Days	v.81: no. 1 (2009: Jan.)	Item in place	Request

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: <code>c.uresolver.getit2.holding_list.supplementary_material</code>	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: <code>c.uresolver.getit2.holding_list.indexes</code>	Y

Table 17. Display Additional Holdings Information

MARC Field	Description	Requires Enabling?
561 (Ownership and Custodial History)	<p>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:</p> <ul style="list-style-type: none"> ■ \$a (History) ■ \$u (Uniform Resource Identifier) ■ \$3 (Materials specified) <p>This information appears after the "Ownership and Custodial History: " label, which can be customized by modifying the description for the following code:</p> <pre>c.uresolver.getit2.holding_list.ownership</pre>	Y
563 (Binding Information)	<p>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:</p> <ul style="list-style-type: none"> ■ \$a (Binding note) ■ \$u (Uniform Resource Identifier) ■ \$3 (Materials specified) <p>This information appears after the "Binding: " label, which can be customized by modifying the description for the following code:</p> <pre>c.uresolver.getit2.holding_list.binding</pre>	Y
541 (Immediate Source of Acquisition Note)	<p>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:</p> <ul style="list-style-type: none"> ■ \$a (Source of acquisition) ■ \$b (Address) ■ \$c (Method of acquisition) ■ \$d (Date of acquisition) <p>This information appears after the "Source of Acquisition: " label, which can be customized by modifying the description for the following code:</p> <pre>c.uresolver.getit2.holding_list.source_of_acq</pre>	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: <code>c.uresolver.getit2.item_list.copy</code>	N

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

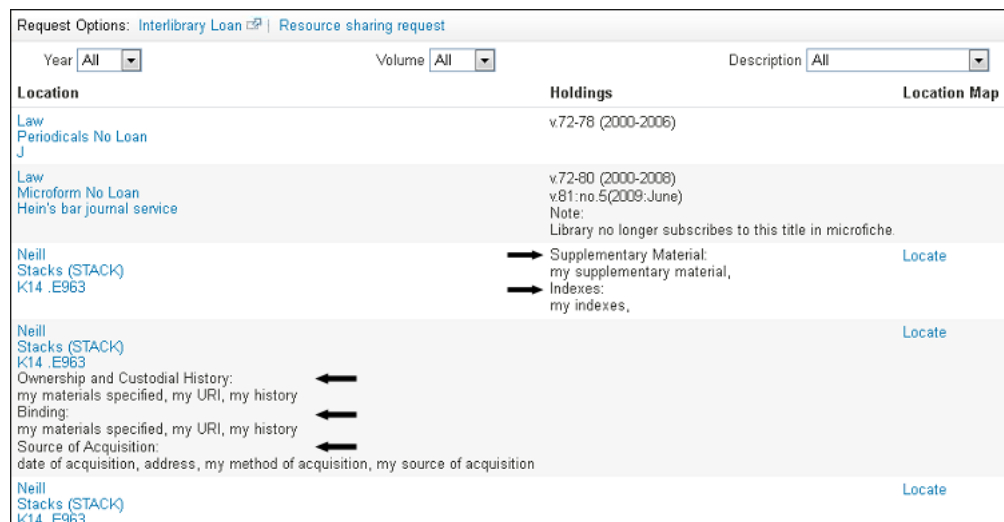


Figure 112: Additional Holdings Information Shown in the Primo Get It Tab

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** on page 151
- **Publishing Electronic Holdings to Primo Central** on page 152
- **Configuring Primo Central to Use the Institutional Holdings File** on page 159
- **Creating an Environment to Test Primo Central** on page 160

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:

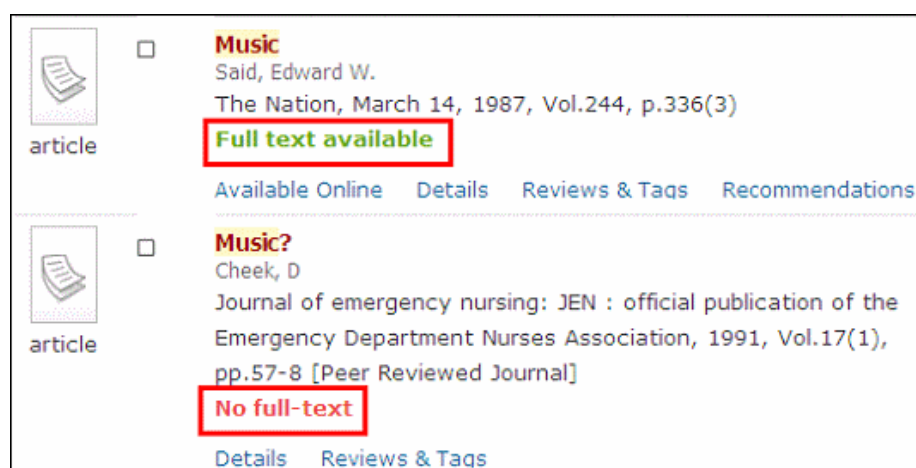


Figure 113: Primo Central Results - Availability Indicators

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).

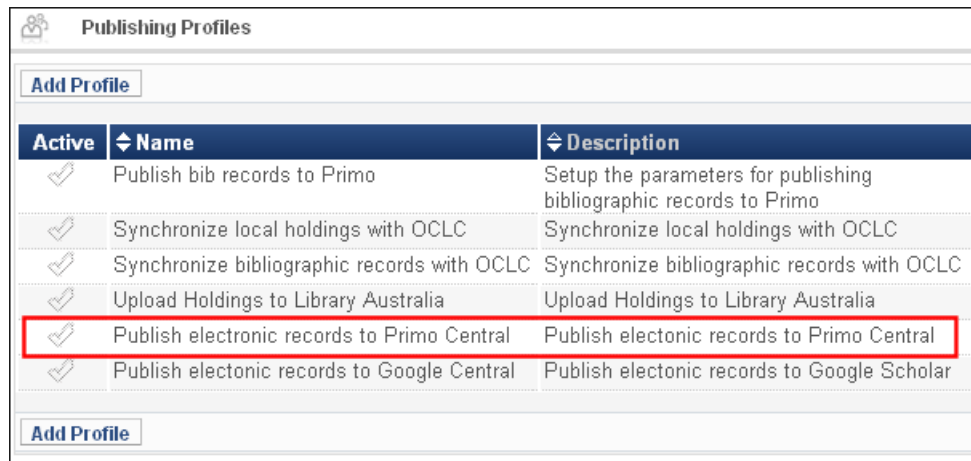
VIDEO:

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.



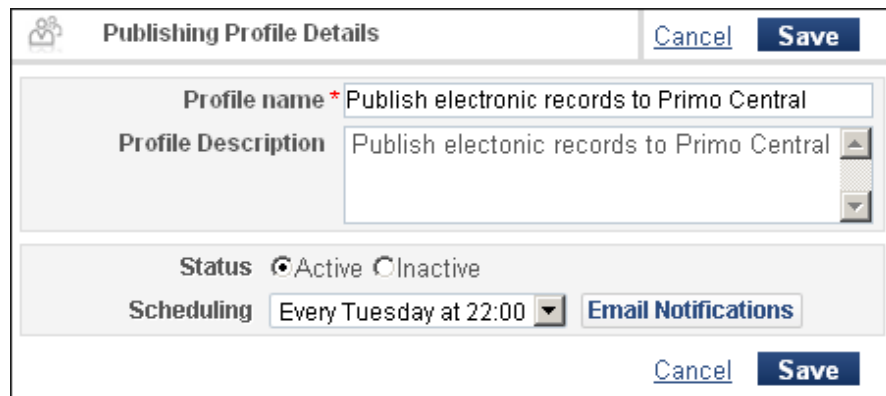
The screenshot shows the 'Publishing Profiles' page. It has a header with a group icon and the title 'Publishing Profiles'. Below the header is an 'Add Profile' button. The main content is a table with three columns: 'Active', 'Name', and 'Description'. The table lists six profiles. The fifth row, 'Publish electronic records to Primo Central', is highlighted with a red border. At the bottom of the table is another 'Add Profile' button.

Active	Name	Description
<input checked="" type="checkbox"/>	Publish bib records to Primo	Setup the parameters for publishing bibliographic records to Primo
<input checked="" type="checkbox"/>	Synchronize local holdings with OCLC	Synchronize local holdings with OCLC
<input checked="" type="checkbox"/>	Synchronize bibliographic records with OCLC	Synchronize bibliographic records with OCLC
<input checked="" type="checkbox"/>	Upload Holdings to Library Australia	Upload Holdings to Library Australia
<input checked="" type="checkbox"/>	Publish electronic records to Primo Central	Publish electronic records to Primo Central
<input checked="" type="checkbox"/>	Publish electronic records to Google Central	Publish electronic records to Google Scholar

Figure 114: Publishing Profiles Page

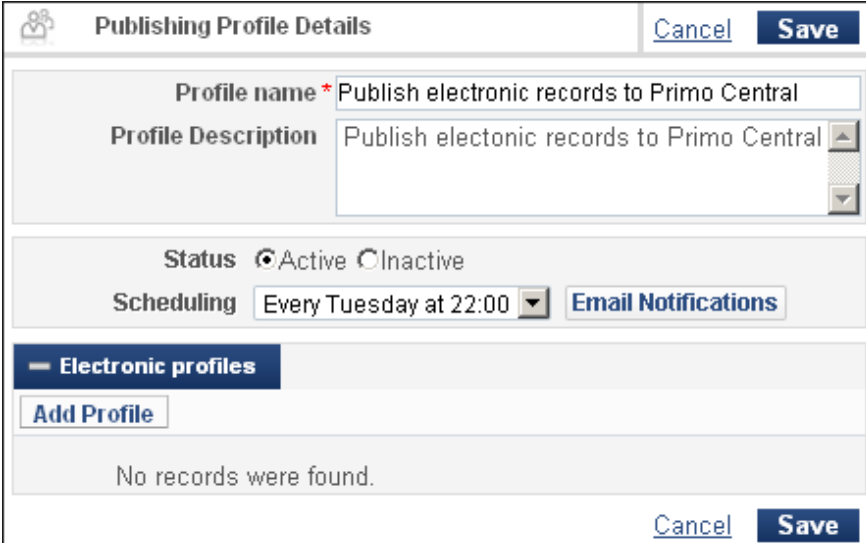
- 2 In the row that contains the **Publish electronic records to Primo Central** profile, select **Actions > Edit**.

The Publishing Profile Details page opens.



The screenshot shows the 'Publishing Profile Details' page. It has a header with a group icon, the title 'Publishing Profile Details', and 'Cancel' and 'Save' buttons. The main content area has two sections. The first section has 'Profile name *' and 'Profile Description' labels, both with text boxes containing 'Publish electronic records to Primo Central'. The second section has 'Status' with radio buttons for 'Active' (selected) and 'Inactive', and 'Scheduling' with a dropdown menu showing 'Every Tuesday at 22:00' and an 'Email Notifications' button. At the bottom right are 'Cancel' and 'Save' buttons.

Figure 115: Publishing Profile Details Page (Standard Configuration)



The screenshot shows a web form titled "Publishing Profile Details". At the top right are "Cancel" and "Save" buttons. The form contains several sections: "Profile name" with a text input field containing "Publish electronic records to Primo Central"; "Profile Description" with a text area containing the same text; "Status" with radio buttons for "Active" (selected) and "Inactive"; "Scheduling" with a dropdown menu set to "Every Tuesday at 22:00" and an "Email Notifications" button; a section titled "Electronic profiles" with an "Add Profile" button; and a message "No records were found." at the bottom. "Cancel" and "Save" buttons are also at the bottom right.

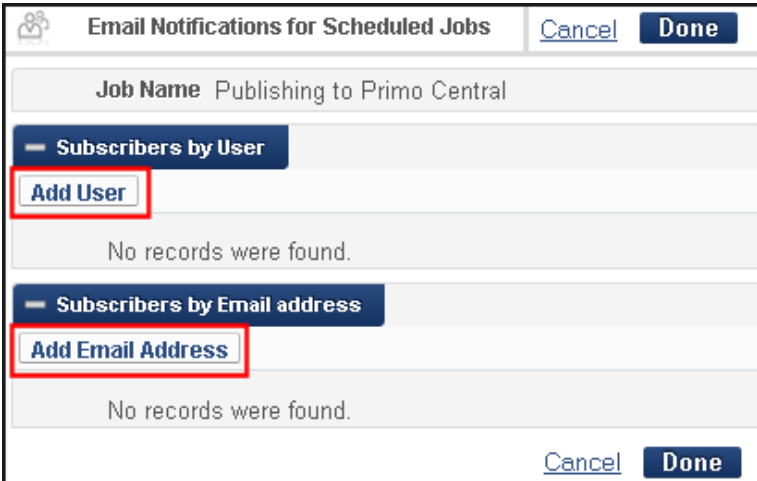
Figure 116: Publishing Profile Details Page (Multicampus Configuration)

- 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.



The screenshot shows a web form titled "Email Notifications for Scheduled Jobs". At the top right are "Cancel" and "Done" buttons. The form contains: "Job Name" with a text input field containing "Publishing to Primo Central"; a section titled "Subscribers by User" with an "Add User" button (highlighted with a red box) and a message "No records were found."; and a section titled "Subscribers by Email address" with an "Add Email Address" button (highlighted with a red box) and a message "No records were found." "Cancel" and "Done" buttons are at the bottom right.

Figure 117: Email Notifications for Scheduled Jobs Page

- 5 Select the users that you want to receive email notifications.
 - a Click **Add User**.

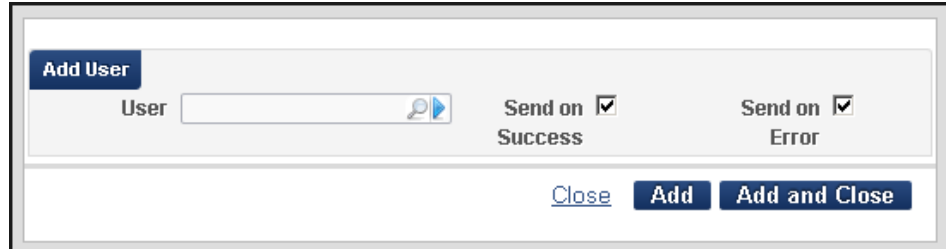
A screenshot of the 'Add User' dialog box. It features a title bar with the text 'Add User'. Below the title bar, there is a 'User' label followed by a text input field and a search icon. To the right of the input field are two checkboxes: 'Send on Success' and 'Send on Error', both of which are checked. At the bottom of the dialog box, there are three buttons: 'Close', 'Add', and 'Add and Close'.

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**.

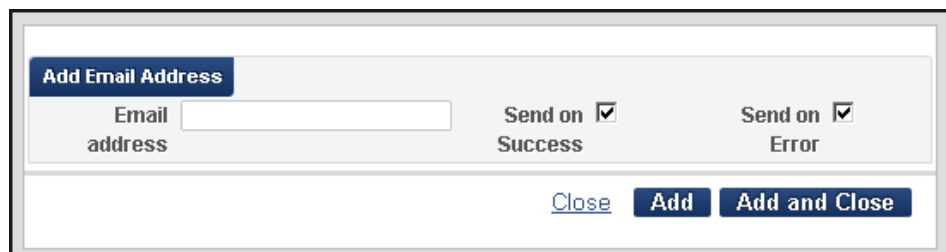
A screenshot of the 'Add Email Address' dialog box. It features a title bar with the text 'Add Email Address'. Below the title bar, there is an 'Email address' label followed by a text input field. To the right of the input field are two checkboxes: 'Send on Success' and 'Send on Error', both of which are checked. At the bottom of the dialog box, there are three buttons: 'Close', 'Add', and 'Add and Close'.

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.

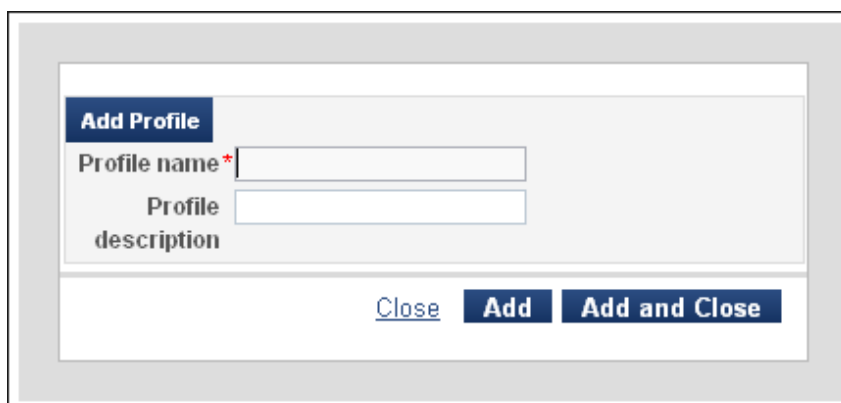
A dialog box titled "Add Profile" with a title bar. It contains two input fields: "Profile name*" and "Profile description". At the bottom, there are three buttons: "Close", "Add", and "Add and Close".

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.

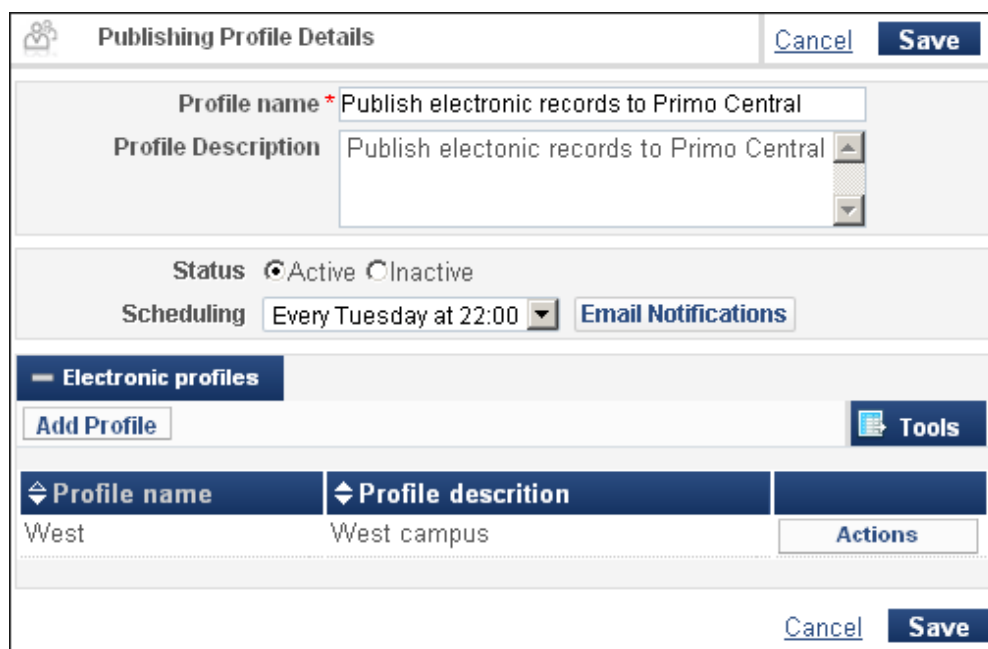
A web form titled "Publishing Profile Details" with a "Cancel" and "Save" button at the top right. The form has several sections: "Profile name*" with a text input containing "Publish electronic records to Primo Central"; "Profile Description" with a text area containing "Publish electronic records to Primo Central"; "Status" with radio buttons for "Active" (selected) and "Inactive"; "Scheduling" with a dropdown menu set to "Every Tuesday at 22:00" and an "Email Notifications" button; a section titled "Electronic profiles" with an "Add Profile" button and a "Tools" button; and a table with two columns: "Profile name" and "Profile description". The table has one row with "West" and "West campus". To the right of the table is an "Actions" button. At the bottom right, there are "Cancel" and "Save" buttons.

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.

The screenshot shows the 'Publishing Profile Details' page. At the top, there are buttons for 'Cancel', 'Back', and 'Save'. Below this, the 'Profile name' is 'West' and the 'Profile Description' is 'West campus'. A section titled 'Electronic profile members' is expanded, showing 'No records were found.' Below this, there is an 'Add another member' button and two input fields with 'Add Campus' and 'Add Library' buttons respectively. At the bottom right, there are 'Cancel', 'Back', and 'Save' buttons.

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**.

The screenshot shows the 'Publishing Profile Details' page after a member has been added. The 'Profile name' is 'West' and the 'Profile Description' is 'West campus'. The 'Electronic profile members' section is expanded, showing '1 - 1 of 1 Records'. A table lists the member with columns 'Member' and 'Type'. The member 'W_CAMPUS' is listed with type 'CAMPUS'. There is a 'Delete' button next to the member. Below the table, there is an 'Add another member' button and two input fields with 'Add Campus' and 'Add Library' buttons respectively. At the bottom right, there are 'Cancel', 'Back', and 'Save' buttons.

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** on page 163
- **Identify Patrons to Provide Relevant Services** on page 163
- **Alma as the Patron Directory for Authentication** on page 167

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:

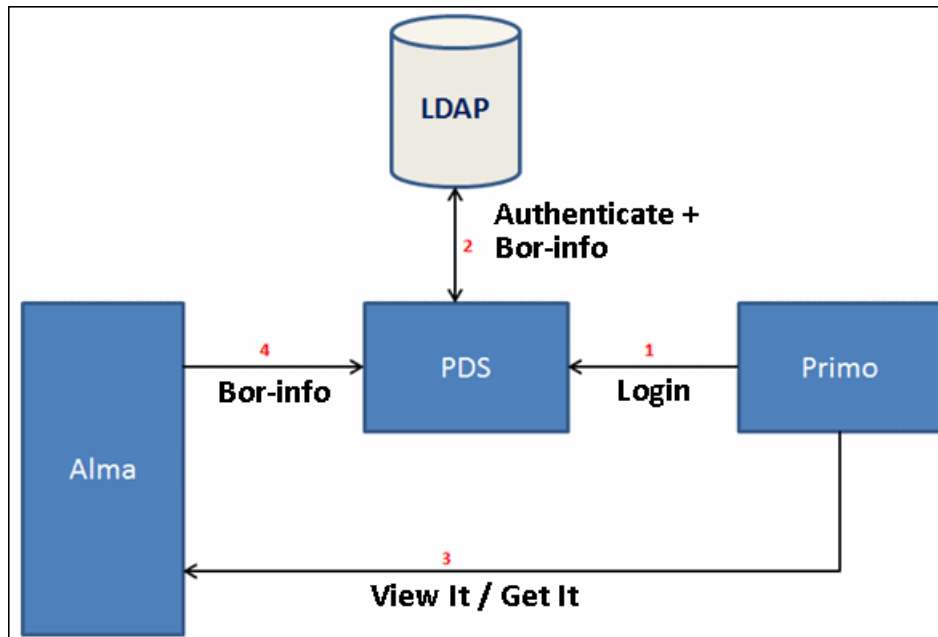


Figure 124: Alma - Primo Authentication Flow

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

```
http://primol.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>23820123442435521060831483217</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:

The screenshot shows the 'User Details' form in Alma. At the top, there's a header with 'User Details' and a user icon. Below this, a summary bar shows 'Name Aase, Luther', 'Primary identifier 2525107216', 'Record type Public', 'Account Type External', and 'User group FACULTY'. A link 'Manage fulfillment activities' is also present. Below the summary bar are tabs for 'General Information', 'Contact Information', 'Identifiers', 'Notes', 'Blocks', and 'Find'. The 'General Information' tab is active, showing a 'User Information' section. This section contains various fields: 'First name' (Luther), 'Last name' (Aase), 'Middle name' (empty), 'PIN number' (empty), 'Job category' (Please select a value), 'Gender' (empty), 'Campus' (empty), 'Preferred language' (English), 'Status date' (17/07/2011), 'Expiration date' (-), 'Created By' (Ex Libris (18/10/2006)), 'Job description' (empty), 'User group' (FACULTY (not listed)), 'Website URL' (empty), 'Status' (Active), 'Birth date' (-), 'Purge date' (-), and 'Updated By' (- (18/10/2006)). The 'Primary identifier' field, which contains the value '2525107216', is highlighted with a red rectangular box. Below the 'User Information' section is a 'User Roles' section.

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 By
<input checked="" type="checkbox"/>	authentication	general	LOCAL	user is updatable	-
<input checked="" type="checkbox"/>	display_viewit_t	general	true	Display viewit target i	-
<input checked="" type="checkbox"/>	email_contact	general	library@exlibris.c		-
<input checked="" type="checkbox"/>	email_contact	general	http://		-
<input checked="" type="checkbox"/>	email_deposit	general	library@exlibris.c		-
<input checked="" type="checkbox"/>	email_deposit	general	Management Dep		-
<input checked="" type="checkbox"/>	email_my_accd	general	http://		-
<input checked="" type="checkbox"/>	email_sender	general			-
<input checked="" type="checkbox"/>	page_size	general	20		-
<input checked="" type="checkbox"/>	primo_patron_in	general	N	user is updatable	-
<input checked="" type="checkbox"/>	primo_pds_url	general		user is updatable	-
<input checked="" type="checkbox"/>	primo_service	general			-
<input checked="" type="checkbox"/>	rss_discovery	general			-
<input checked="" type="checkbox"/>	smsDateFormat	general	dd-MMM HH:mm		-
<input checked="" type="checkbox"/>	system_time_fc	general	kk:mm:ss z		admin1
<input checked="" type="checkbox"/>	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:

The screenshot shows the 'User Details' form in Alma. At the top, it displays 'Name Black, Shawn', 'Primary identifier 21-91376416', 'Record type Staff', and 'User group STAFF'. Below this is a tabbed interface with 'General Information' selected. The 'User Information' section contains fields for First name (Shawn), Last name (Black), PIN number, Job category (Please select a value), Gender, Campus, Preferred language (English), Status date (07/03/2011), Expiration date, Created By (admin1 (07/03/2011)), Middle name, Primary identifier (editor04), Job description, User group (STAFF (not listed)), Website URL, Status (Active), Birth date (19/03/2012), and Purge date. The 'User Management Information' section is expanded, showing 'Type' with two radio buttons: 'Internal' (selected) and 'Internal with external authentication'. A red box highlights the 'Internal' option and its description: 'Internal - Refers to a user type whereby the user information is managed wholly within Alma.' Below this is a 'Password' field with masked characters.

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
./apachectl auto
```

Configuring the Calling Institution

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

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

NOTE:

The PDS is configured on the Primo side.

To create the `tab_service` file manually:

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

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

- 2 Enter the `AUTHENTICATE`, `BOR_INFO`, and `INSTITUTE_DISPLAY` sections for your institution. For example:

```
[AUTHENTICATE]
program = dps.pl
params = 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.

[Primo Home](#) > [Ongoing Configuration Wizards](#) > **PDS Configuration Wizard**

> **PDS - Configure Rosetta for Boston College**

Method:

Configuration of Rosetta Authentication Method

Host name/IP:

Port:

Operation code:

Use secure: ☒ Do not use secure
☐ Use secure

Cancel & Go Back
To Authentication Methods

Save & Continue
To Authentication Methods
*Note: Will be saved in file only
when Authentication Methods is saved*

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.

The screenshot shows a web interface for the 'PDS Configuration Wizard'. The breadcrumb trail at the top is 'Primo Home > Ongoing Configuration Wizards > PDS Configuration Wizard'. Below this, a section header reads '> PDS - Configure Rosetta for Boston College'. A 'Method:' dropdown menu is set to 'Rosetta'. The main section is titled 'Configuration of Rosetta User Attributes'. It contains several input fields: 'Host name/IP:' with the value 'qa.alma.exlibrisgroup.c', 'Port:' with the value '80', and 'Operation code:' with a dropdown set to 'BOR_INFO'. Under 'Use secure:', there are two radio buttons; 'Do not use secure' is selected. At the bottom, there are two buttons: 'Cancel & Go Back' (labeled 'To User Attributes') and 'Save & Continue' (labeled 'To User Attributes'). A note below the 'Save & Continue' button states: 'Note: Will be saved in file only when User Attributes is saved'.

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
```

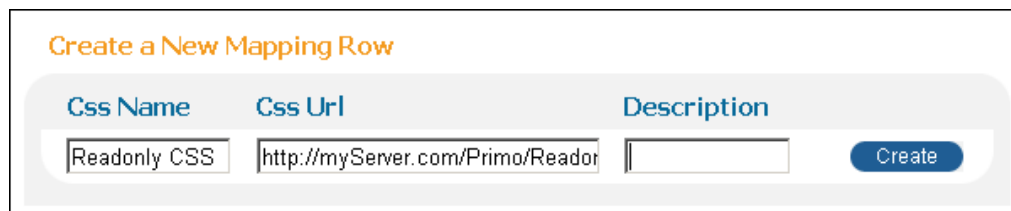
A

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.



Css Name	Css Url	Description
Readonly CSS	http://myServer.com/Primo/Readonly	

Create

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.

The screenshot shows the 'Edit View Attributes' form for the 'alma' view. The form is divided into three main sections: General Attributes, Appearance, and Languages. The 'General Attributes' section includes fields for View Name (alma), Code (alma), Default user institution (Alma), Is Template (No), Description (DESC default), Enable My Library Card (checked), Invoke automatic search when tabs are switched (checked), Default Institution (By IP), Session timeout URL, and Copied From (default). The 'Appearance' section includes Layout Set (customized layout), CSS (Default CSS), and Mobile CSS (Mobile CSS). The 'Languages' section includes Default interface language (English). At the bottom, there are two buttons: 'Cancel & Go back To Views List' and 'Save & Continue To Scopes List'.

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}
```