GIL Alma/Primo Quintuple Feature

1. Alma/Primo sandboxes and how to access them (SeanP: 5 Mins)
2. Alma catalogs in EBSCO Discovery Service (EDS) explained (SeanB: 5 mins)
3. The New Titles List (SeanP: 5 minutes)
4. Counter Reports in Alma and how to view them (SeanB: 5 mins)
5. The Primo Renorm process briefly explained (SeanP/Bob: 15 mins)
Alma/Primo sandboxes
And how to access them
Alma/Primo Sandboxes

- **Alma**
  - 3 institutional sandboxes and one network zone sandbox.
  - All USG institutions can utilize these sandboxes.
  - You can only use internal logins with the Alma sandboxes.

- **NEW!**
  - In early 2019, Ex Libris provided a new set of Alma sandboxes.
    - **Benefits:**
      - Automatic refresh of the Premium Sandboxes, four times a year, (First sunday of February, May, August, and November)
      - Consortia customers can order additional Premium sandboxes (at a cost)
      - The "old" Alma sandboxes will remain in place until the end of the year.
      - Note that there is no new Primo sandbox.
Alma/Primo Sandboxes

- **Primo**
  - 3 institutional sandboxes contain data
  - All USG institutions can utilize these sandboxes
  - Again, you can only use internal logins. Logins come from the new alma sandboxes
Alma Sandboxes

How to access

Alma

Remember that there are old and new Alma sandboxes

https://sites.google.com/view/g3almatraining/support/sandboxes

Here are the URLs for the NEW (as of 2019) Alma Sandboxes:

- Augusta: https://galileo-aug-psb.alma.exlibrisgroup.com/mng/login
- GA Southern: https://galileo-georgiasouthern-psb.alma.exlibrisgroup.com/mng/login
- UGA: https://galileo-uga-psb.alma.exlibrisgroup.com/mng/login
- Network Zone: https://galileo-network-psb.alma.exlibrisgroup.com/mng/login

Here are the URLs for the OLD Alma Sandboxes (we've been told that these will go away in 2020):

- Augusta: https://sandbox01-na.alma.exlibrisgroup.com/mng/login?institute=01GALI_AUG
- GA Southern: https://sandbox01-na.alma.exlibrisgroup.com/mng/login?institute=01GALI_GASOUTH
- UGA: https://sandbox01-na.alma.exlibrisgroup.com/mng/login?institute=01GALI_UGA
- Network Zone: https://sandbox01-na.alma.exlibrisgroup.com/mng/login?institute=01GALI_NETWORK

Usernames and passwords were sent to institutional leads. If you don’t have login credentials, come see me after the presentation and I will send them to you.

The Training Wiki has all of this information:
https://sites.google.com/view/g3almatraining/support/sandboxes
Primo Sandboxes

- **Primo**
  - Augusta:  
  - Georgia Southern:  
  - UGA:  
  - GA Tech:  
    https://galileo-primo-sb.hosted.exlibrisgroup.com/primo-explore/search?vid=01GALI_GIT
  - Logins (for testing patron logins to Primo, eg the “My Account” area) come from the NEW Alma sandbox. Note that you can only use internal patron accounts.

The Training Wiki has all of this information:  
https://sites.google.com/view/g3almatraining/support/sandboxes
Alma catalogs in EBSCO EDS

Explained
Step One: Alma IZ Publishing Profiles

- Two publishing profiles - electronic and physical
- Follow daily publishing schedule
- Filters
  - Electronic - filters out course reserves
  - Physical - filters our course reserves and records that currently have 977 $c (location name), $h (call #), $i (call number - second part).
- Data enrichment
  - Electronic - remove vendor 856s, add institution base url - http://galileo.usg-XXX-primo....
  - Physical - remove vendor 856s, add local holdings info - 852 (c,h,i) and 977 (c,h,i)
- Regularly publishes update and/or delete file to GIL FTP
  - Deleted titles are noted by a “d” in the leader position 5
- Full update is “manually” published twice a year
Step Two: Alma NZ Publishing Profiles

- Set-up for each institution
- Run every day @ 11 pm
- Publishes updates to NZ electronic collections
- Data enrichment
  - Electronic - remove vendor 856s, add institution base url - http://galileo.usg-XXX-primo....
- Regularly publishes update and/or delete file to GIL FTP
  - Deleted titles are noted by a “d” in the leader position 5
- Full update is “manually” published twice a year
Step Three: GIL FTP to EBSCO FTP

- **GIL Script**
  - Looks for Alma files on GIL FTP
    - Typically includes 6 files - updates & deletes
  - Zips them up
  - Sends them to institutional EBSCO FTP
Step Four: EBSCO processes files

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<thead>
<tr>
<th>Customer Name</th>
<th>Costid</th>
<th>Catalog</th>
<th>Date received</th>
<th>Date processed</th>
<th>Processed Files</th>
<th>Type of upload</th>
<th>Status</th>
<th>Links to log files</th>
</tr>
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<tbody>
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<td>UNIV OF GEORGIA</td>
<td>uga1</td>
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<td>Update</td>
<td></td>
<td>Production Log</td>
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<td></td>
<td>Removed Record Log</td>
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<td>Warning Log</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>Warning Log</td>
</tr>
</tbody>
</table>
The New Titles List

It’s also an API!
The New Titles List

- History
  - In the Voyager/VuFind era, the “New Titles List” was a plugin developed by the community that enabled the searching over and sorting of the latest titles added to Voyager.
  - Had robust features: filtering, book cover display, sorting, etc.
  - Originally developed by Michael Doran at UT Alington
  - This was relatively straightforward in GIL Voyager, as the database was hosted and controlled by GIL staff.
  - Alas, we have entered the era of the cloud and we cannot rely on simple SQL queries to provide us the new title information.
  - Example
The New Titles List

- Alma
  - We could do a **new titles** “scope”, but this would require you to perform a search.
  - ExLibris does not empower GIL staff to run queries on the database that stores title information.
  - BUT there’s Alma Analytics, which allows us to run SQL-like queries on Alma data, with some limitations (and a ~24 hour delay)
  - As far as we can tell, no ExLibris Alma API enables access to the latest titles
  - But we CAN get Analytics Report output via the Alma API…
The New Titles List

Solution

- Two Alma Analytics Reports for every institution
  - Daily Electronic New Titles
  - Daily Physical New Titles
- Two daily jobs that pull and parse the above report XML output via the Alma Analytics API
- A Simple Ruby on Rails app that stores title information and provides API endpoints for accessing the data
- Simple, token-based authentication on a per-Institution basis
GIL hosts a version of the new titles list that makes use of this API for all institutions. It is linked from the ellipsis menu in Primo. It utilizes jQuery Datatables to enable searching, pagination, sorting and other features.

URL: https://newtitles.gil.usg.edu/
Source: https://gitlab.galileo.usg.edu/GIL/new-titles-api
The New Titles API!

- API
  - You can build your own front-end, or just dynamically grab your newest titles to display on a webpage or libguide.
  - USG Member Institutions can request an API key from GIL Support
  - The API Key will limit the returned records to only those from your institution.
  - Optionally, you can send a parameter to specify a media_type
    - https://newtitles.gil.usg.edu/api/v1/list?media_type=DVD
  - Or, you can limit by location:
    - https://newtitles.gil.usg.edu/api/v1/list?location=Main+Library++Second+Floor+Rotunda

URL: https://newtitles.gil.usg.edu/
Source: https://gitlab.galileo.usg.edu/GIL/new-titles-api
Counter Reports in Alma
And how to view them
Counter Reports in Alma

Counter reports are loaded in the vendor area of Alma
Counter Reports in Alma

- Search for and click the GALILEO vendor profile
Counter Reports in Alma

- Click on the Usage Data tab
Counter Reports in Alma

Scroll down to find all the loaded Counter Reports

<table>
<thead>
<tr>
<th>File Name</th>
<th>SUSHI Account</th>
<th>Upload Date</th>
<th>Uploading User</th>
<th>Subscriber</th>
<th>Status</th>
<th>Report Type</th>
<th>Data Start Date</th>
<th>Data End Date</th>
<th>Vendor URL</th>
<th>Report Success Rate (Global)</th>
</tr>
</thead>
</table>
Renorm Process Briefly Explained

Normalization Rules and More
Republishing Bibs from Alma

- In Alma
  - Create set
  - Goto ‘Run a Job’
  - Limit by Type ‘Publishing’.
  - From Network Zone
    - Run ‘Network Zone Republish Set of Titles’ (not the ‘Impl’ one)
  - From Institution Zone
    - Run ‘Mark records to be republished by NZ job’ (not the ‘Impl’ one)

- In Primo (central staff only)
  - Run regular pipe
  - Run dedup/frbr
  - Run indexing
  - The Daily schedule will also pick these up (in Production)
Primo Re-Norm / Re-Indexing Process

- Incoming data (records Published to Primo)
  - Primo has a non-PNX copy of all the Bibs published from Alma.
  - After Bibs are published, it used this data to create the PNX.
  - When a Re-norm is done, it goes through all the published data (most recent of each record) and recreates the PNX for them all.
PNX Record (Primo Normalized XML)

- Primo has a PNX record for every Bib published to it
- Contains everything that can be displayed in Primo
  - This includes Bib data and Availability data
- Divided into sections
  - Display, Search, Facets, Links, etc.
- You can click on ‘Show PNX’ at the bottom of any Full record display
Normalization Rules

- The Norm Rules control what is in the PNX and how it is formatted
- They are divided into the same sections as the PNX
- Most changes or additions to the Norm Rules require a Re-Norm
## Normalization Rules

<table>
<thead>
<tr>
<th>Rule group</th>
<th>display creator</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Source</strong></td>
<td>MARC 952.13</td>
</tr>
<tr>
<td><strong>Conditions</strong></td>
<td>True And True</td>
</tr>
<tr>
<td><strong>Condition 1 - Logic</strong></td>
<td>True</td>
</tr>
<tr>
<td><strong>Type</strong></td>
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<tr>
<td><strong>Field</strong></td>
<td>952</td>
</tr>
<tr>
<td><strong>Ind1</strong></td>
<td>Include A</td>
</tr>
<tr>
<td><strong>Ind2</strong></td>
<td>Include A</td>
</tr>
<tr>
<td><strong>Success IF</strong></td>
<td>Match Current</td>
</tr>
<tr>
<td><strong>Condition 2 - Logic</strong></td>
<td>True</td>
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<tr>
<td><strong>Type</strong></td>
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<tr>
<td><strong>Field</strong></td>
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<td><strong>Ind1</strong></td>
<td>Include 9</td>
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<td><strong>Ind2</strong></td>
<td>Include 9</td>
</tr>
<tr>
<td><strong>Success IF</strong></td>
<td>Match Current</td>
</tr>
</tbody>
</table>

### Transformations
- **Transformation**: Replace Characters
- **Parameter**: Replace Characters as "@*"
- **Action**: ADD
Re-norm Pipe

- Re-Norm creates new PNX for each record
  - The Re-Norm Pipe goes through all the most recent copies of Primo’s published data
  - Creates a new PNX for each
Regular Pipe

- This pipe only processes published data that has not been loaded
  - Creates a new PNX for each Bib
  - Then Adds/Replaces it in the Primo data
Re-Indexing

- Re-Indexing builds new entries for the Primo search indexes
  - Processes only the newly created PNXs
  - Built outside of the online indexes
  - After all new index records have been built the Hotswapping process runs
Daily Publishing Schedule

- 4am - Alma Publishes changes
- 5am-6am - Primo processes/imports these changes
- 7am - Primo indexing and hot swap
- 10am - Alma Publishes new changes
- 11am-12pm - Primo processes/imports these changes
- 1pm - Primo indexing and hot swap
- 4pm - Alma Publishes new changes
- 5pm-6pm - Primo processes/imports these changes
- 7pm - Primo indexing and hot swap
Primo Enhancement Process

- Primo OPAC Change request form:
  - [http://goto.gil.usg.edu/changeform](http://goto.gil.usg.edu/changeform)
- Primo OPAC Change Requests end up on this Trello board:
  - [https://trello.com/b/q7au1tuB/primo-opac-change-requests](https://trello.com/b/q7au1tuB/primo-opac-change-requests)
- Primo Renorm History
  - [https://trello.com/b/nkVXo7cM/primo-opac-change-history](https://trello.com/b/nkVXo7cM/primo-opac-change-history)
- Primo planning meeting with GIL and Primo OPAC Chair / Vice Chair, every two weeks, where we work out what will be in the next renorm and what enhancements GIL will be working on.
Questions?

The GIL User Guide: http://goto.gil.usg.edu/giluserguide