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:
    https://galileo-usg-augusta-primo-sb.hosted.exlibrisgroup.com/primo-explore/search?vid=AUGUSTA_V
  - Georgia Southern:
    https://galileo-usg-gasou-primo-sb.hosted.exlibrisgroup.com/primo-explore/search?vid=GASOU
  - UGA:
    https://galileo-usg-uga-primo-sb.hosted.exlibrisgroup.com/primo-explore/search?vid=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

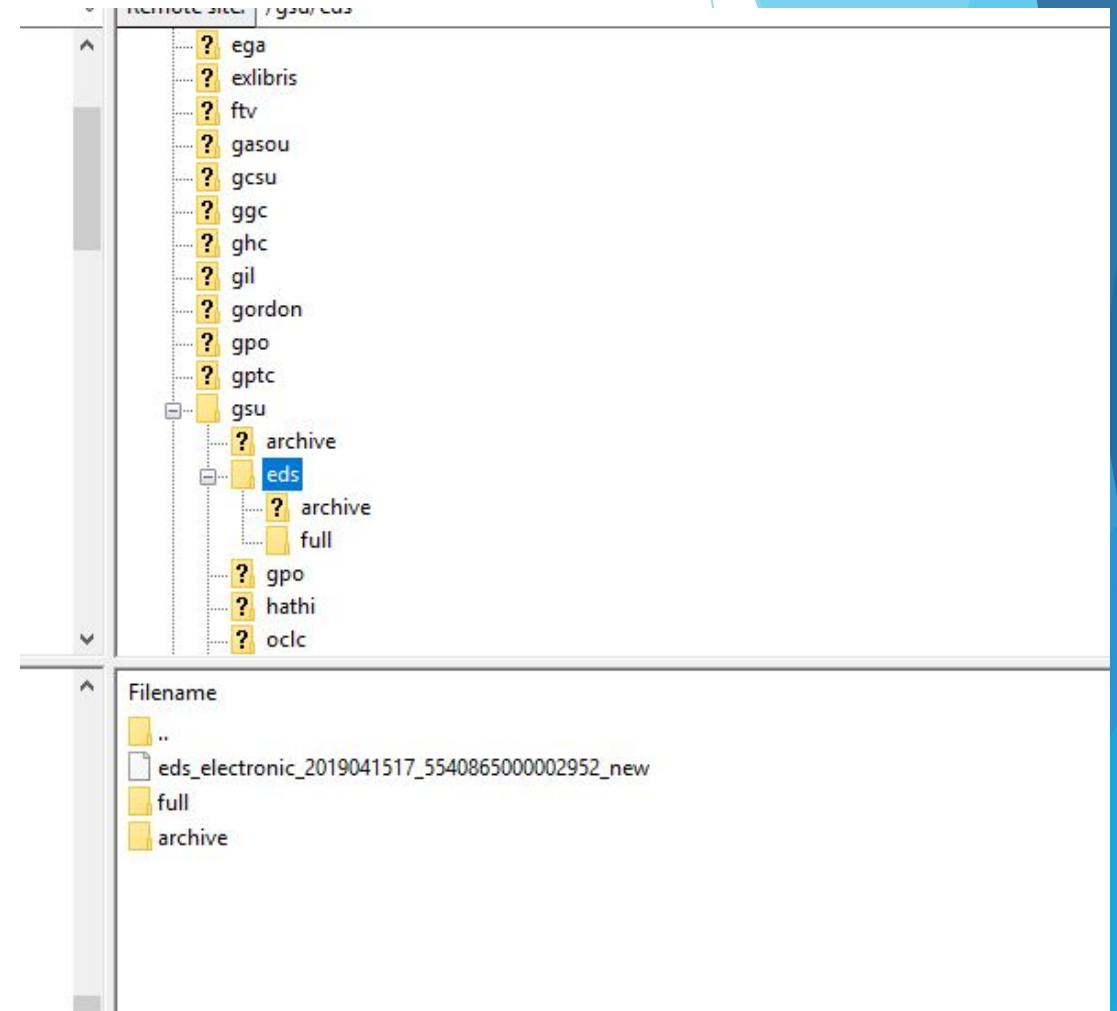|	Publishing Profile Type : All ▾		
	Active	▲ Name	⬍ Description
1	⬤	EDS: Publish Electronic titles via FTP	Publishes Electronic records to EDS
2	⬤	EDS: Publish Physical titles via FTP	Publish Physical titles to EDS

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

Catalog Status for UNIV OF GEORGIA   [Update Display]

Select sites:
```
All Sites(all)
PALS (ns225692)
UNIV OF GEORGIA (uga1)
UNIV OF GEORGIA SCHOOL OF LAW (s1096390)
```

Include: ● Any Status ○ Success Only ○ Failures Only
Date received: from 4/29/2019   to 5/13/2019

Customer Name	CustId	Catalog	Date received	Date processed	Processed Files	Type of upload	Status	Links to log files

▲ UNIV OF GEORGIA	uga1	cat06564a	5/13/2019	5/13/2019	//spider/mirror/production/ftp.epnet.com/cat06564a/20190512-0509-update/eds-electronic_2019051208_15776904430002959_new
					//spider/mirror/production/ftp.epnet.com/cat06564a/20190512-0509-update/eds-physical_2019051114_15773464420002959_delete
					//spider/mirror/production/ftp.epnet.com/cat06564a/20190512-0509-update/eds-physical_2019051114_15773464420002959_new
					//spider/mirror/production/ftp.epnet.com/cat06564a/20190513-0509-update/eds-electronic-nz_2019051302_14505416860002931_new
					//spider/mirror/production/ftp.epnet.com/cat06564a/20190513-0509-update/eds-electronic_2019051308_15790779670002959_new
					//spider/mirror/production/ftp.epnet.com/cat06564a/20190513-0509-update/eds-physical_2019051209_15776904440002959_new
						Update	Record Count Statistics: CustCatLoader
							
							Good Records: 42124 (includes 9 deletes)
							Bad Records: 0
							Total Records: 42124
							Records/Second: 115.15
								Production Log
								Removed Record Log
								Warning Log

UNIV OF GEORGIA	uga1	cat06564a	5/11/2019	5/13/2019	//spider/mirror/production/ftp.epnet.com/cat06564a/20190511-0508-update/eds-electronic-nz_2019051102_14459086100002931_new
					//spider/mirror/production/ftp.epnet.com/cat06564a/20190511-0508-update/eds-electronic_2019051108_15773464410002959_new
					//spider/mirror/production/ftp.epnet.com/cat06564a/20190511-0508-update/eds-physical_2019051010_15769519250002959_delete
					//spider/mirror/production/ftp.epnet.com/cat06564a/20190511-0508-update/eds-physical_2019051010_15769519250002959_new
						Update	Record Count Statistics: CustCatLoader
							
							Good Records: 6464 (includes 11 deletes)
							Bad Records: 0
							Total Records: 6464
							Records/Second: 50.73
								Production Log
								Removed Record Log
								Warning Log

UNIV OF GEORGIA	uga1	cat06564a	5/10/2019	5/10/2019	//spider/mirror/production/ftp.epnet.com/cat06564a/20190510-0510-update/eds-electronic-nz_2019051002_14435537370002931_new
					//spider/mirror/production/ftp.epnet.com/cat06564a/20190510-0510-update/eds-electronic_2019051008_15769519240002959_delete
					//spider/mirror/production/ftp.epnet.com/cat06564a/20190510-0510-update/eds-electronic_2019051008_15769519240002959_new
					//spider/mirror/production/ftp.epnet.com/cat06564a/20190510-0510-update/eds-physical_2019050911_15753884230002959_delete
					//spider/mirror/production/ftp.epnet.com/cat06564a/20190510-0510-update/eds-physical_2019050911_15753884230002959_new
						Update	Record Count Statistics: CustCatLoader
							
							Good Records: 23094 (includes 63 deletes)
							Bad Records: 0
							Total Records: 23094
							Records/Second: 99.34
								Production Log
								Removed Record Log
								Warning Log

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 coud and we cannot rely on simple SQL queries to provide us the new title information.
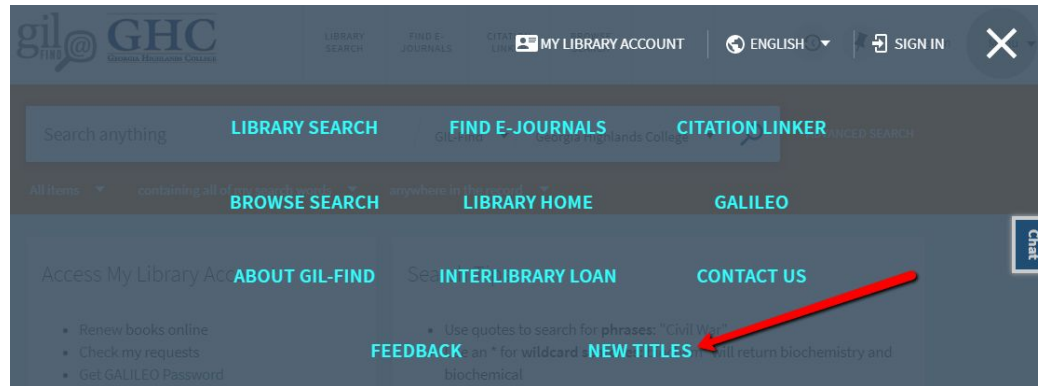 - ► Example

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

The New Titles List

► 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+%28Rotunda%29

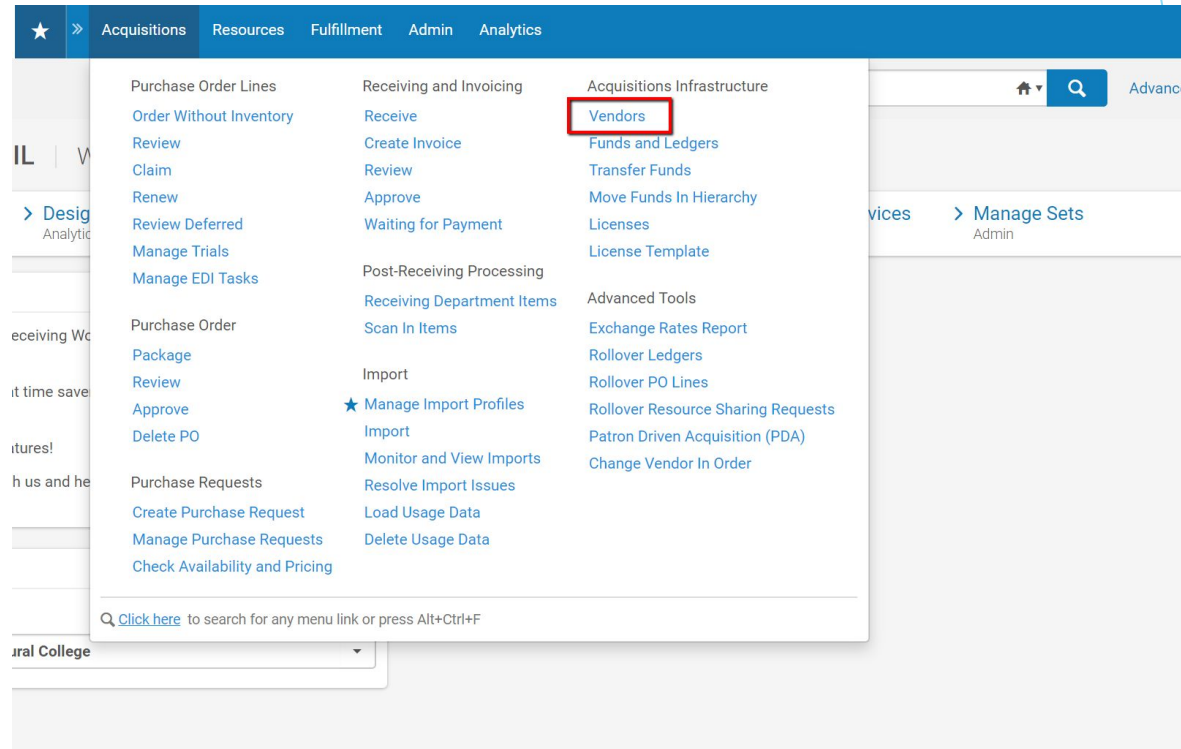URL: https://newtitles.gil.usg.edu/
Source: https://gitlab.galileo.usg.edu/GIL/new-titles-api

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

Vendors ▼	All ▼			🔍

Search Vendors

1 - 3 of 3   ⊕ Add Vendor

▼ Vendor Status : **Active** ▼   Vendor Type : **All** ▼

	Shared	Active	▲ Vendor Code	⬍ Name	Vendor Type	Libraries
1		⬤	Dona	Donation	Material Supplier	Augusta University
2		⬤	EBSCO	EBSCO	Material Supplier	Augusta University
3		⬤	galileo	GALILEO COUNTER Reports	Licensor	Augusta University

Counter Reports in Alma

► Click on the Usage Data tab

Counter Reports in Alma

► Scroll down to find all the loaded Counter Reports

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

display:creator	5	Type	Field	Ind1	Ind2	Subfield				
		MARC	100	1,2		a	MERGE- Merge to single PNX field			
		Type	Field	Ind1	Ind2	Subfield				
		MARC	952	0,1,3		A	MERGE- Merge to single PNX field			
		Type	Field	Ind1	Ind2	Subfield				
		MARC	880			a,b,c,d,e,j,q,u	Add single PNX field			
		Type	Field	Ind1	Ind2	Subfield				
		MARC	953	0,1,2	-2	A	MERGE- Merge to single PNX field			
		Type	Field	Ind1	Ind2	Subfield				
		MARC	110			a,b,c,d,e	MERGE- Merge to single PNX field			
		Type	Field	Ind1	Ind2	Subfield				
		MARC	952	0,1,3		a,d,e,g,i,j,q,u,3,5	Add single PNX field			
		Type	Field	Ind1	Ind2	Subfield				
		MARC	100	1,2		a	MERGE- Merge to single PNX field			
		Type	Field	Ind1	Ind2	Subfield				
		MARC	111			a,b,c,d,n	MERGE- Merge to single PNX field			
		Type	Field	Ind1	Ind2	Subfield				
		MARC	100	1,2		b,c,d,e,j,q,u	MERGE- Merge to single PNX field			
		Type	Value								
		Constant	;				MERGE- Merge to single PNX field			
		Type	Field	Ind1	Ind2	Subfield				
		MARC	880			a,b,c,d,n	Add single PNX field			
		Type	Field	Ind1	Ind2	Subfield				
		MARC	100			a,b,c,d,e,j,q,u	MERGE- Merge to single PNX field			
		Type	Field	Ind1	Ind2	Subfield				
		MARC	100	-1,-2		a,b,c,d,e,j,q,u	MERGE- Merge to single PNX field			
		Type	Field	Ind1	Ind2	Subfield				
		MARC	953	0,1,2	-2	a,b,c,d,e,g,i,u,3,5	Add single PNX field			
		Type	Field	Ind1	Ind2	Subfield				
		MARC	880			a,b,c,d,e	Add single PNX field	USG_admin	2019-03-27 19:05:04.0	Edit
		Comments								

Normalization Rules

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

01GALI-USG Production

Primo Home > Monitor Primo Status > Pipe Monitoring

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

⊙ Pipes List

Owner: [All institutions ▼] ☐ Display Template Pipes

Owner	Pipe Name	Pipe Type	Stage	Status		
University System of Georgia	01GALI_USG_ALMA	Regular	completed successfully	completed	Edit	Execute
University System of Georgia	01GALI_USG_ALMA_DELETE	Delete DS	N/A	N/A	Edit	Execute
University System of Georgia	01GALI_USG_ALMA_RENORM	No harvesting - Update DS	completed successfully	completed	Edit	Execute
Georgia Archives	ARCHIVES_ALMA	Regular	harvesting-copy-files	completed ❗	Edit	Execute
Georgia Archives	ARCHIVES_ALMA_DELETE	Delete DS	N/A	N/A	Edit	Execute
Georgia Archives	ARCHIVES_ALMA_RENORM	No harvesting - Update DS	completed successfully	completed	Edit	Execute

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
- Primo OPAC Change Requests end up on this Trello board:
  - https://trello.com/b/q7au1tuB/primo-opac-change-requests
- Primo Renorm 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