Alma / Primo Leads Call - November 7, 2017

Attendees

Wade Guidry
Paula Laine @ Bellevue
Tammy Siebenberg - YVC
George -- Edmonds
John Mullen - Everett
vsolheim
Troy Farnham - LCC
Lily (SPSCC)
Marji MacKenzie - Green River
Nadine -GRC
Laura Staley - Renton Tech
Traci Taylor - BTC
Naoko Yasuda - Highline
Sally - Whatcom
Leslie Potter-Henderson# Shoreline
John
Dale Burke - Edmonds
Nicole-Bellevue
Ryer
cara.stevenson
Jennie Vano - CPTC
Jennifer D at GRC
Tria - WVC
elenabianco
Leslie Potter-Henderson

Recording

https://bigbend.zoom.us/recording/play/rt35aa1gHogBNBwbk2OjN0XU4pPovidzXdV0KdLOX6V_3LXutUiQIeZlD6XQB1Yw

Summary of last week's Ebsco Meeting

On Nov 1, 2017, at the Murano Hotel (site of 2017 WLA) in Tacoma, four representatives from WACTCLC (Wade Guidry, Mindy Coslor, Howard Fuller, Christie Flynn) met with two representatives from EBSCO (Greg Padilla, George Dragich) to talk informal about group licensing of content by WACTCLC.

One of the things we learned about on Wednesday was an electronic resources Request for Quotes) RFQ for shared content, put out earlier this year by the Arizona Community College Library Consortium (ACCLC, http://www.azcclc.org).

I've been in contact with that consortium, which formed initially around this RFQ (analogous to how Alma / Primo was our genesis), and have obtained a copy of the RFQ to share with the WACTCLC executive committee.
The RFQ doesn't go into detail about the actual content that was desired. Instead, it focuses on the "form factor" of the delivered content, and consistent availability across institutions.

As well, the RFQ requests pricing for "per FTSE" as well as unified consortial pricing, for content of interest to individual institutions, but not the entire consortium.

As discussed after the meeting, among the WACTCLC attendees, next steps for the consortium *might* include:

- Formation of shared content working group
- Comprehensive inventory of shared content currently licensed by WACTCLC institutions

Primo Normalization Rules

At the meeting, we had a general overview discussion about Primo normalization rules, and what they do. Primo normalization rules play an important role in both the search and display aspects of Primo.
As Primo Total Care customers, we do not currently have direct access to view or edit normalization rules via Primo Back Office (PBO). But with the coming release of Primo VE (mid-2018), we will begin to enjoy greater access to PBO. From the Primo VE FAQs (https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Primo_VE/005Frequently_Asked_Questions):

> *How does Primo VE affect Primo Total Care customers? Will Total Care*
>
> *customers get access to the Primo configuration menus?*

Primo VE is designed to simplify the Primo backend configuration and processes and is suitable to all customer types and deployments. Primo Total Care customers who move to the Primo VE deployment will get full access to the Primo configuration menus through Alma, which are task-oriented and very easy to use.

Total Care customers who would rather not configure Primo themselves may request Ex Libris to perform periodic changes for them. Although, the feedback received from Total Care customers who have already moved to Primo VE are clearly in favor of handling the configuration and periodic changes themselves.

A good, basic primer on Primo normalization can be found on the Orbis Cascade Alliance site: [Why should I care about normalization rules](#).

Browse searching in Primo

As a subset of this topic, we discussed the impact of normalization rules on browse searching, and also the impact of headings enrichment.

For subject browse searches, the cross-references seen in the search results appear based on the presence of preferred terms in the PNX record, which themselves can be the result of manual cataloging (including both the preferred and non-preferred terms in an Alma record, or from headings enrichment.

When headings enrichment is enabled, the Alma record remains unchanged, but the PNX record published to Primo includes the addition of preferred authority terms, as discussed in the Knowledge Center (https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Integrations_with_External_Systems/030Resource_Management/100Publishing_to_Primo_and_Primo_Central#Publishing_Headings_Enrichment_to_Primo):

MARC 21 and UNIMARC records are enriched with information from related Alma authority records (either local or Community Zone authority records) for the following bibliographic record authorization fields:

MARC 21 – 100-199, 600, 610, 611, 630, 648, 650, 651, 654, 655, 700, 710, 711, 730, 751, 752, 754, 800, 810, 811 or 830
UNIMARC – 410, 411, 416, 500, 600, 601, 602, 605, 606, 607, 616, 617 700, 701, 702, 703, 710, 711, 712, 713, 720, 721, 722, 723, 730, 740, 741, or 742

Specifically, the enrichment includes the 1XX and 4XX, preferred and nonpreferred, information when available in the related authority record. This enrichment is provided with the selection of the Headings enrichment publishing parameter described in the procedure below.

This especially enhances the Primo search capability of nonpreferred (4XX) terms so that, for example, Mark Twain can be found with Samuel Clemens; and with the cross references to the Primo author and subject browse list, when the heading Samuel Clemens appears, it displays "See Twain, Mark."

Optionally, headings enrichment authorization can also include the following 5XX see also authority fields when the Heading enrichment – enrich with "See Also" fields publishing parameter is selected as described in Publishing to Primo:

·   MARC 21 – 500, 510, 511, 530, 548, 550, 551, 555, 562, 580, 581, 582, or 585

·   UNIMARC – 500, 510, 511, 515, 530, 550, 580

The "g" that is appearing in the display of 650 fields (I believe) appears because the PNX normalization rule for the 650 field indicates to display the 650 $w subfield.

Review of Alma Sandboxes

We reviewed the WACTCLC Alma sandbox landscape, which includes three generic and equivalent sandboxes for use by WACTCLC institutions:

Sandbox 1:
https://sandbox01-na.alma.exlibrisgroup.com/mng/login?institute=01STATEWA_BELCC&auth=local
Sandbox 2:
https://sandbox01-na.alma.exlibrisgroup.com/mng/login?institute=01STATEWA_BIGBEND&auth=local
Sandbox 3:
https://sandbox01-na.alma.exlibrisgroup.com/institution/01STATEWA_EVERETT&auth=local

Under separate cover (and not to be shared on any public lists or forums), we will re-distribute the default set of account names and passwords for the sandboxes to the institutional leads.

As a best practice when using the sandboxes, you should create your own personal account on the sandbox immediately after logging in with one of the generic accounts.

You should then use your personal sandbox account whenever using the sandbox for testing or training.

Alma / Primo workshop at Bellingham Technical College, for Tuesday, November 28

As discussed at the November 7 call, we are planning an in-person Alma / Primo workshop at Bellingham Technical College, for Tuesday, November 28, 9am to 4:30 pm.

Anticipated topics include:

- New Alma UI
- Electronic Resources Collection Management (including creation of local collections)
- Alma Analytics
- Primo Analytics
- Fulfillment Terms of Use and Notices

The format will be primarily demo-led discussion. And we will be in a computer lab setting, where you will likely be able to log into your institutional Alma environment.

Seating will be limited to 30 attendees.

Please complete the following survey, once for each anticipated attendee, by Friday November 10, so we can determine demand vs capacity.

(If you don't plan on attending, no need to do the survey.)

Survey: https://goo.gl/forms/JZutyOFonhhHqRpg2

Chat Transcript

00:06:48	Traci Taylor - BTC:	yes
00:09:02	Wade Guidry:	http://www.azcclc.org
00:11:14	Dale Burke - Edmonds:	John and Ryer should mute their mics
00:11:31	Traci Taylor - BTC:	Is it RFQ or RFP?
00:11:49	Traci Taylor - BTC:	Thank you for clarifying. :)
00:16:34	Nicole-Bellevue:	Paula's the queen of normalization rules
00:17:23	Tammy Siebenberg - YVC:	PBO? What is that?
00:17:58	Tammy Siebenberg - YVC:	Thanks

00:18:13   Lily (SPSCC): Primo Back Office
00:20:27   Lily (SPSCC): It's where a lot of customization for Primo is done. As Total Care customers, we don't have full access to it.
00:29:00   Tammy Siebenberg - YVC: How does Edmonds have a link to MARC in Primo records?
00:32:59   Laura Staley - Renton Tech: Recently ExLibris allowed us to to choose to add a link "Display Source Record", so we could see MARC records.
00:33:57   Tammy Siebenberg - YVC: Thanks, Laura. I missed that.
00:41:37   Dale Burke - Edmonds: To clarify, are there Primo Normalization rules and Alma Normalization rules? Can you say anything about the differences.
00:51:19   Lily (SPSCC): What are "gtt" headings? Where are they coming from?
00:52:11   Laura Staley - Renton Tech: GOO-trefwoorden thesaurus. ???
00:52:46   Lily (SPSCC): That's Dutch, right? Why do we have them?
00:54:03   Laura Staley - Renton Tech: Courtest of Library of Congress Linked Data Service, apparently. http://id.loc.gov/vocabulary/subjectSchemes/gtt.html
00:54:05   Nicole-Bellevue: I find looking at the PNX records help me identify links that are coming from the PCI that aren't working
00:56:36   Traci Taylor - BTC: Not that i recall
00:57:16   Nicole-Bellevue: What days did you all reserve the hotel for ELUNA?
00:57:18   Traci Taylor - BTC: Was there interest from anyone about presenting at ELUNA?
01:01:30   Tria - WVC: @Nicole - May 1- May 4
01:02:08   Dale Burke - Edmonds: George and Dale can attend on the 28th
01:02:17   John: Tim mentioned that there would be these meetings in other areas as well. Will these same topics be discussed later on as well?
01:03:03   Dale Burke - Edmonds: Got to go to Reference. Thanks!
01:05:28   Ryer: zoom could be nice and Centralia could host in future if desired.
01:07:11   Sally - Whatcom: @Nicole - i book night before start, checking out last day of conference.
01:07:34   George -- Edmonds: Thanks
01:07:38   Nicole-Bellevue: Thanks
01:07:40   Laura Staley - Renton Tech: Thanks. Bye!
01:07:43   Victoria - Pierce College: Thanks :)
01:07:45   Traci Taylor - BTC: Thanks.