

# WACTCLC - Alma / Primo Call - January 19, 2021

## Meeting Link:

<https://bigbend.zoom.us/j/99019436290>

## Recording:

[https://bigbend.zoom.us/rec/share/IFAHLe0zigy\\_2pNhqGBtDGnMT1C\\_bmnmDXyWDUb8LondCTaxsrbl38QYABDkZ8Ca.md7Aq6g3PMqrhvEz?startTime=1611079424000](https://bigbend.zoom.us/rec/share/IFAHLe0zigy_2pNhqGBtDGnMT1C_bmnmDXyWDUb8LondCTaxsrbl38QYABDkZ8Ca.md7Aq6g3PMqrhvEz?startTime=1611079424000)

## Attendees:

Amy Herman  
Cara Beth  
Charles Chitty  
Clare Bryant  
Deb Derylak (she/her)  
Elena Bianco - Skagit (Elena Bianco)  
Hyesoo/Centralia  
Isaac Devereux (Shoreline)  
Jennifer  
Karen Waite  
Kirsti Thomas (Seattle Colleges)  
Laura Staley  
Lesley Caldwell (Pierce College# she/her)  
Leslie Potter-Henderson  
Librarian Ro  
Lily Kun (SPSCC)  
Lurana Culligan (Edmonds)  
Melinda Martin  
Name (Original Name)  
Naoko Yasuda (Highline) (Alice Hunter)  
Nicole Longpre  
Patricia Naylor (South Seattle College)  
Paula Laine  
Ryer Banta  
Sally Sheedy  
srostkoski  
Stephanie

Tammy Siebenberg (YVC) (Tammy Siebenberg)  
Tria Skirko  
Valerie  
Wade Guidry  
Will Parnell  
Xinhang

## Upcoming Webinars

Upcoming ExL Webinar opportunities are listed below.

Note specifically the Dedup / FRBR session, a topic discussed and demo'ed at one of our recent calls.

Dear Colleagues,

We would like to remind you that several Primo webinars are coming up and make sure you are aware of our new **Primo VE – Become an Expert** series.

The following Primo product sessions and those in the continuing Go VE series, started late last year, are scheduled over the next few weeks. You can register for multiple sessions simultaneously through the [Primo program page](#) or use the links listed below for specific sessions.

- **What's New with Primo (January 20)**
  - EMEA/APAC – 8 am (Helsinki); 2 pm (Singapore); 3 pm (Tokyo); 5 pm (Sydney)  
[Register](#)
  - AMERICAS/EMEA – 8 am (San Francisco); 10 am (Chicago); 4 pm (London)  
[Register](#)
- **Go VE - Become an Expert: Getting Started with Go VE (January 26)**
  - AMERICAS/EMEA – 8 am (San Francisco); 10 am (Chicago); 4 pm (London)  
[Register](#)
- **Go VE – Become an Expert: Primo VE APIs (February 2)**
  - EMEA/APAC – 8 am (Helsinki); 2 pm (Singapore); 3 pm (Tokyo); 5 pm (Sydney)  
[Register](#)
- **Go VE - Become an Expert: Dedup, FRBR, and Additional Features (February 9)**
  - AMERICAS/EMEA – 8 am (San Francisco); 10 am (Chicago); 4 pm (London)  
[Register](#)
- **2021 Primo Roadmap Overview (February 10)**
  - EMEA/APAC – 8 am (Helsinki); 2 pm (Singapore); 3 pm (Tokyo); 5 pm (Sydney)  
[Register](#)

- AMERICAS/EMEA – 8 am (San Francisco); 10 am (Chicago); 4 pm (London)  
[Register](#)

The new **Primo VE – Become an Expert** webinar series starts January 28 and runs through mid-April. A [dedicated page in the Knowledge Center](#) provides an overview of this series, lists each session with a description, and includes registration links. You can also [register for multiple sessions simultaneously here](#). The first three webinars in this series are:

- **Introduction to Discovery (January 28)**
  - AMERICAS/EMEA – 8 am (San Francisco); 10 am (Chicago); 4 pm (London)  
[Register](#)
- **How Primo Works (February 4)**
  - AMERICAS/EMEA – 8 am (San Francisco); 10 am (Chicago); 4 pm (London)  
[Register](#)
- **Search Configuration (February 11)**
  - AMERICAS/EMEA – 8 am (San Francisco); 10 am (Chicago); 4 pm (London)  
[Register](#)

We will make all session recordings and presentations available to you, since sessions aren't necessarily at optimal times for everyone or sometimes a schedule conflict can impact attendance.

If there is a particular session topic that you would like to see in a future webinar, or a session you would like to request to have repeated, please email us.

We hope you can join or one of these upcoming sessions or view a recording once available.

Regards,

**The Ex Libris Support Team**

## CDI Publishing Profile Report

You can now subscribe to or view the daily results of the CDI Publishing Profile.

The publishing profile reports are available for review or subscription under Alma / Resources / Publishing Profiles

A screenshot of the report as received by email, if you choose to subscribe to publishing results by email, appears below:



## System Job Notification

Guidry Wade

Centralia College  
600 Centralia  
Centralia  
98531  
USA

- CC Charles
- CB Clare Br
- DD Deb Der

Invite

Dear Wade

## Job Report

|                   |                         |                         |                                                          |
|-------------------|-------------------------|-------------------------|----------------------------------------------------------|
| Process ID        | 1956520580002806        | Name                    | Publishing electronic records to Central Discovery Index |
| Started on        | 01/18/2021 22:07:40 PST | Finished on             | 01/18/2021 22:38:02 PST                                  |
| Total run time    | 30 Minutes 22 Seconds   | Created by              | System                                                   |
| Status            | Completed Successfully  | Status date             | 01/18/2021 22:38:02 PST                                  |
| Records processed | 266945                  | Records with exceptions | 0                                                        |

## Counters

Institution level records

266945

The **Institution level records** count indicates the number of bibliographic records in Alma that were processed for publishing to the CDI.

This count includes records that are marked in Alma for publishing to the CDI. Generally, this count should roughly equal the number of electronic titles you have in Alma.

However, if you have a collection (such as an ebook collection) that you have marked to *not* be published to the CDI (to prevent duplicate search results in Primo, for example), those titles will *not* be included in this count.

Also, with respect to SJ's question about identical result counts appearing on consecutive days...

I believe the cause of this issue was the failure of Alma to remove CZ electronic titles from your inventory when those titles were deaccessioned by the vendors and so from the associated CZ collections. ExLibris addressed this issue in the Alma January 2021 release, so I am guessing that those duplicate results across days will go away with that fix.

To be investigated:

*How to report in analytics the identity of titles published to the CDI for a given time period.*

## Refactoring Budget lines from Legacy (FMS) to ctcLink Platform

The question came up today about how to refactor, or transpose, budget lines from the legacy financial system (FMS) to ctcLink.

This question may be worth discussion at an upcoming LLC meeting.

The first point of contact for ctcLink budget questions will likely be the subject matter expert (SME) for the Finance at your campus.

I cannot find a directory of all SMEs on the ctcLink web site, so you will need to refer to your campus's ctcLink project website for that contact info.

In addition, those of you particularly involved in budgeting for your library may wish to join the relevant support listserv for the Finance pillar, as listed at:

<https://www.sbctc.edu/colleges-staff/it-support/erp-support/support-lists.aspx>

## SFTP service within Alma

An SFTP (secure file transfer protocol) server is useful or required for a few different workflows within Alma, including:

Patron Batch Loads

Courses (for Course Reserves) Batch Loads

Import of large sets of MARC record

Prior to the December 2020 Alma release, institutions were required to provide their own SFTP server for use with these workflows.

Starting with the December 2020 Alma release, Alma includes a built in SFTP service, isolated for each customer, so that you no longer need to provide your own SFTP server.

The documentation for finding the connectivity info for the SFTP service for your specific Alma instance can be found at:

[Procedure to set SFTP key authentication in Alma - Ex Libris Knowledge Center \(exlibrisgroup.com\)](https://exlibrisgroup.com/Procedure-to-set-SFTP-key-authentication-in-Alma-Ex-Libris-Knowledge-Center)

To connect to the SFTP server associated with Alma, you will need an SFTP client, to allow you to connect to and upload files to the SFTP server.

[WinSCP](#) is a free and easy-to-use SFTP client.

If and when you are ready to use the Alma SFTP service at your site, please contact me and I can help you get set up.

## Chat

00:10:16 Wade Guidry:  
<https://docs.google.com/document/d/1KuIEfk9QEk37Haf0SqBPqlyP-u3Ce8VeFQgP2tmsFwU/edit?usp=sharing>

01:02:29 Tria Skirko: OFM

01:07:54 Tria Skirko: That's just a maybe answer :-)

01:08:08 Tria Skirko: Thanks all!

01:08:33 Lesley Caldwell (Pierce College, she/her): Thanks!