

# ULMS Summer Meeting 2018

## Resource Management Sessions

Day 2: August 14, 2018 Tue

Room: Anacapa

[goo.gl/XE83UJ](https://goo.gl/XE83UJ)

Zoom meeting id: 972-880-1391

# Workflows from end-to-end

9:15-10:30am

## Marc holdings record templates

Best for: gifts, deposit items

Marc holdings record (general training)

<https://calstate.atlassian.net/wiki/spaces/ULMS/pages/36274210/MARC+Format+Training>

Marc holdings records template example

[https://docs.google.com/document/d/1ispVYVNAdjZSP2RdgvqwBu7oz4pQ\\_caOQp2C16CZ1mA/edit#heading=h.g7nk1qyawhpt](https://docs.google.com/document/d/1ispVYVNAdjZSP2RdgvqwBu7oz4pQ_caOQp2C16CZ1mA/edit#heading=h.g7nk1qyawhpt)

### Examples in SJO Sandbox (Member 2)

book	99162309602901	44866025	mbj stacks holdings template
gov doc (lc + sudoc)	99162309702901	1035948550	mbj gov doc holdings template

How to configure the call number type (LC, SuDoc, Accession Number) for each library/location:

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/030Fulfillment/080Configuring\\_Fulfillment/030Configuring\\_Physical\\_Locations](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/030Configuring_Physical_Locations)

How to configure the default holdings record created by Alma automated processes.  
Search for "default holdings template" in

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/040Metadata\\_Management/050Working\\_with\\_Templates](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/040Metadata_Management/050Working_with_Templates)

Alma roadmap

"Enhanced Holdings Record Search, Sets and Jobs" p.88,93 (H2 2019/2020)

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Materials/010Roadmap](https://knowledge.exlibrisgroup.com/Alma/Product_Materials/010Roadmap)

# Duplicating item records

(As soon as you duplicate an item record, the new item record exists in Alma and you can't cancel its creation. If you make a mistake you can edit the item record or withdraw it.)


collection

99162309502901

1013887660

mbj special collections holdings template

< List of Items Back



### Gwen Brewer collection. Brewer, Gwen (English professor), creator. 1965 ▼

**Location** King Library: Special Collection... View all holdings

1 - 2 of 2

Call number Q

Sort routine ▼

+ Add ItemBind ItemsChange HoldingsOpen Predicted ItemsWithdraw itemsRelink to and

▼ Status : All ▼

<input type="checkbox"/>	Barcode	Librar	Location	Call Number	Alternative Call Number	Description	Temporary Location	Status	Process type	Access Number		
1 <input type="checkbox"/>	44145	King Libr...	Special Collections	55412	-	box 2	No	Item in place	-	-	-	...
2 <input type="checkbox"/>	-	King Libr...	Special Collections	55412	-	box 1	No	Item in place	-	-	-	...

- View
- Edit
- Duplicate
- Change Location
- Withdraw
- Toggle Missing Status
- Work Order
- View hidden

# Batch create item records

If you need to create many item records, you can use an import profile.

Scenario: there's a collection-level record in Special Collections with 50 boxes, each requiring an item record. Or your library recently barcoded issues of a serial and you need to add many item records in Alma.

Import profile to batch add item records

<https://docs.google.com/document/d/1HD7lpkWfQ-Wu4VY5SEXJdEUm-8ePwm7jttiREig-BWQ/edit?usp=sharing>

Demo files

[https://drive.google.com/drive/folders/1I\\_Ls5T-t6U3uNyG0UKtaozhy5vFELSEk?usp=sharing](https://drive.google.com/drive/folders/1I_Ls5T-t6U3uNyG0UKtaozhy5vFELSEk?usp=sharing)

# Gobi API ebooks workflow

After ordering an ebook from Gobi, the Gobi API creates a brief bibliographic record in Alma with an electronic portfolio and Purchase Order (PO) line.

The update inventory import profile adds the url provided by Gobi to the portfolio.

Gobi API ebooks update inventory import profile and activation workflow:

<https://docs.google.com/document/d/1iqbA7IYLLeczDO7eKqYOaG0TZ6Yvn9hdHUefOZ6d4Qw/edit?usp=sharing>

CSUN example: oclc 1029759749, pol-5862

purchased:	07/26/18 Thu
url added:	07/31/18 Tue

Other Gobi ebook workflows from the CSU:

<https://calstate.atlassian.net/wiki/spaces/UAE/pages/458391559/GOBI+API+Single+Title+ebook+workflow>

# Jstor ebooks DDA NZ setup

Demand Driven Acquisitions (DDA) setup:

no PO lines in Alma, DDA funds already on deposit with Jstor, not using Alma's DDA/PDA functionality,

Jstor provides Marc bibliographic records through Worldshare Collection Manager (WCM). bib records have the resource's url in 856 \$u. bib records imported to NZ, portfolios created in NZ, collection shared with all campuses.

Purchase trigger: 144 chapter views or 96 chapter downloads.

Money: \$91,000 in one-time funds from Chancellor's Office

How the systemwide DDA program was setup in the Network Zone.

<https://docs.google.com/document/d/1k8z4k4f4PqFuUNk8yCWZsPN8WMoSFca8WBCVPtWHXnM/edit?usp=sharing>

Using regular expressions to specify Marc files in Alma ftp import profiles

[https://docs.google.com/document/d/13hbHaC5\\_XdjNGeSCHBX2Ck10ceqShTj0s3X8IQ0XGSM/edit?usp=sharing](https://docs.google.com/document/d/13hbHaC5_XdjNGeSCHBX2Ck10ceqShTj0s3X8IQ0XGSM/edit?usp=sharing)

Chancellor's Office Worldshare Collection Manager account:

<https://californiastateuniversity-officeofchancellor.share.worldcat.org/wms>

Sacramento's workflow to maintain their Jstor DDA titles (Israel Yanez)

[https://drive.google.com/file/d/1X\\_ff1cUUof5ocFPbSv86L95pUZeqvSko/view?usp=sharing](https://drive.google.com/file/d/1X_ff1cUUof5ocFPbSv86L95pUZeqvSko/view?usp=sharing)



Spreadsheet of Jstor DDA titles  
includes OCLC numbers, NZ MMS IDs, ISBNs and titles

spreadsheet emailed weekly, if you're interested in receiving, email  
[mjun@calstate.edu](mailto:mjun@calstate.edu)

[https://docs.google.com/spreadsheets/d/1eEV\\_ezc13xxeenJs6mXKE6TC8yKqRHStdMN\\_4LF\\_w-E/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1eEV_ezc13xxeenJs6mXKE6TC8yKqRHStdMN_4LF_w-E/edit?usp=sharing)

## Additional topics

Import profile for adding e-portfolios to existing bibliographic records

[https://docs.google.com/document/d/1\\_YGFL4AA6XdV1L8MY0-M8ao0rAmp--PErtTO9hOYPT0/edit?usp=sharing](https://docs.google.com/document/d/1_YGFL4AA6XdV1L8MY0-M8ao0rAmp--PErtTO9hOYPT0/edit?usp=sharing)

Use case: During cutover CSUN had some bibliographic records that were not identified properly as P2E and when the records migrated, e-portfolios were not added to the bib records.

## Serials prediction patterns:

### How to setup prediction patterns:

<https://docs.google.com/document/d/1ZrcTmAHM6csIIIMgVpz24IpHNLKmhg5tnEEv0LhMxxss/edit?usp=sharing>

### Prediction pattern (853) examples:

<https://docs.google.com/spreadsheets/d/1ZKpJMFcT3cZVvsbVqQXQtNDiSQ1mmyKxec5zDTtcg5s/edit?usp=sharing>

### Demo examples:

Modern healthcare	99162309902901	3346252	Weekly	POL-273
Operations research	99162309802901 v.66 no.3 (May/Jun 2018)	2394608 07/27/18	Bimonthly	POL-269
Children's Lit Assoc Qtrly	99162310002901 v.43 no.2 (Sum 2018)	5853997 06/21/18	Quarterly	n/a
Better homes gardens	99162310102901 v.96 no.8 (Aug 2018)	5902855 07/20/18	Monthly	POL-274

## Autofill (Chrome extension)

<https://docs.google.com/document/d/1Lo7OBdwbiN4784dgQxvWpMgZGm76OfriSkNleh7W-So/edit>

## Marcive Documents without Shelves (NZ collection)

[https://docs.google.com/document/d/1cc4H\\_OBRCwaDRoYapFmiSq0unN0kCrpGlebBR1d2Gio/edit?usp=sharing](https://docs.google.com/document/d/1cc4H_OBRCwaDRoYapFmiSq0unN0kCrpGlebBR1d2Gio/edit?usp=sharing)

## In processing workflow (opt?)

From acquisitions, to cataloging, to materials processing, to shelving

<https://docs.google.com/document/d/1uFkpeNqVJDORZDfrRpfllGy-ou4HhOQYZi6l8cSG40/edit?usp=sharing>

## Gobi API print books workflow

[https://docs.google.com/document/d/1r9hDB1-MlXk58nuVtu\\_UMDpNGk5TavrWQP29oNH3BwU/edit?usp=sharing](https://docs.google.com/document/d/1r9hDB1-MlXk58nuVtu_UMDpNGk5TavrWQP29oNH3BwU/edit?usp=sharing)

## *Merge/combine Javascript*

[https://drive.google.com/open?id=19SdNY\\_KfjjSy6xeucTESJ7CIATMA5NTf](https://drive.google.com/open?id=19SdNY_KfjjSy6xeucTESJ7CIATMA5NTf)

## *Document object model*

[https://www.w3schools.com/js/js\\_htmlDOM.asp](https://www.w3schools.com/js/js_htmlDOM.asp)

## *Inspect HTML element in Chrome*

<https://www.wikihow.com/Inspect-Element-on-Chrome>

## *Demo in Alma: hiding "back to top" button*

## *Chrome javascript console*

<https://developers.google.com/web/tools/chrome-devtools/console/>

## *Free online courses on Ruby and Javascript through the Flatiron School*

*(Start with Ruby then do Javascript.)*

<https://flatironschool.com/programs/online-bootcamp-prep-course/>

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# Identification of Source of Records and Troubleshooting using Alma/Primo

10:45-12:00pm

Thanks to Luiz Mendes and Chris Bullock for sharing their presentation slides.

<https://docs.google.com/presentation/d/1QuUnRu3SB0DdgyGjT5lxmGr9eudC6mDomwMEbsR8wsw/edit?usp=sharing>

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# Alma

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## Zones



**Institution (IZ):** local, campus data

(local fields, physical and electronic inventory, orders, bib records)

IZ bib records may be linked to NZ bib records



**Network (NZ):** shared database of bib records

represents the aggregated collection of all CSU libraries


**Community (CZ):** electronic resources knowledge base (KB)

# Icons

IZ-only record (does not have an icon)

↑ Institution     Network     Community

Sort by : Rank ▾    Secondary Sort by : Rank ▾    Expand ▾

1  Tennessee real estate / by the Real Estate Board of Memphis ; edited by Mahlon Lynn Townsend. Edit Record Ho

**Book {Book - Physical}** By Real Estate Board of Memphis. (Ann Arbor, Mich. : University Microfilms International 1979.)

**Subject:** Real estate business--Tennessee.

**Language:** English

**Record number:** (cnos)b13592701-01cals\_uno

**Update Date:** 06/14/2018

**MMS ID:** 991005488089702914

Physical (1)     Electronic     Digital    [Other details](#)



## < Record View

Tennessee real estate / by the Real Estate Board of Memphis ; edited by Mahlon Lyn

<b>MMS ID</b>	991005488089702914	<b>Suppress from publishing</b>	No
<b>Brief level</b>	10	<b>Record format</b>	marc21
<b>Originating system</b>	ILS	<b>Originating system ID</b>	b13592701-01cals_uno


MARC

BIBFRAME

```
LDR 00927cam a2200229 i 4500
001 991005488089702914
005 1996070960029.0
008 790228r19791958xx 00000 eng d
035 __|a (cnos)b13592701-01cals_uno
040 __|a CNO |c CNO
```


001: NZ records end in 2901 while IZ records end in 29xx or 167x.  
The 035 can also include indications that this was a migrated record.  
And 01cals-uno indicates the campus name. uno = Northridge

IZ record linked to the NZ (has network icon)

🏠 Institution    Network    Community

Sort by : Rank ▾   Secondary Sort by : Rank ▾   [Expand: Physic](#)

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 **Journal / Supreme Court of the United States.** [Edit Re](#)

**Journal {Other Serial - Physical}** By United States.  
Supreme Court. ([Washington, D.C.? : Supreme Court  
Began with 1889.)

**Subject:** United States.–Supreme Court–Periodicals.  
United States.–Supreme Court. Law reports, digests,  
etc.–United States. and others

**Language:** English   **MMS ID:** 991007277209702917

**ISSN:** 0270-9805

**Record number:** ocm02641607-01cals\_network

**Update Date:** 07/04/2017


Physical (1)    Electronic    Digital   [Other details](#)

IZ record linked to CZ (has the two-people icon)

🏠 Institution    👤 Network    👥 Community

Sort by : Rank ▾    Secondary Sort by : Rank ▾    [Exp](#)

---

1  **Journal / Supreme Court of the United States.** [Edit Record](#)

**Journal {Other Serial - Electronic}** By United States.  
Supreme Court. ([Washington, D.C.? : Supreme Court  
Began with 1889.)

**Language:** English    **MMS ID:** 991012363181302914  
**ISSN:** 0270-9805  
**Record number:** (OCoLC) 2641607  
**Update Date:** 05/01/2018

Physical    ● Electronic (1)    Digital    [Other details](#)

## Sources of records

### Example:

Title: Journal / Supreme Court of the United States.

ISSN: 0270-9805

OCLC: 2641607

NZ

record from OCLC

[< Record View](#)

**Journal / Supreme Court of the United States.**

<b>MMS ID</b>	991006626339702901	<b>Suppress from publishing</b>	No
<b>Brief level</b>	10	<b>Record format</b>	marc21
<b>Originating system</b>	OCLC	<b>Originating system ID</b>	ocm0264

035

035	__la ocm02641607-01cals_network
035	__la (OCoLC)2641607
035	__la (OCoLC)ocm02641607

1  [Journal / Supreme Court of the United States.](#)

CZ

Community Zone (aka Central KnowledgeBase (CKB))

< Record View

### Journal / Supreme Court of the United States.

<b>MMS ID</b>	991067781814102901	<b>Suppress from publishing</b>	No
<b>Brief level</b>	-	<b>Record format</b>	marc21
<b>Originating system</b>	CKB	<b>Originating system ID</b>	9999104

035

035	__ a (OCoLC)2641607
035	__ a (CKB)991042723416550
035	__ a (CONSER)—46034564-

(Beware: CZ records may have OCLC numbers in the 035, which may make it appear to be an NZ record but look for the CKB and the CZ icon next to the title.)

1  [Journal / Supreme Court of the United States.](#)

## CZ example: Proquest Ebook Central

[https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL5\\_ALMA51439682310002901&context=L&vid=01CAL5\\_UNO&search\\_scope=EVERYTHING&tab=everything&lang=en\\_US](https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL5_ALMA51439682310002901&context=L&vid=01CAL5_UNO&search_scope=EVERYTHING&tab=everything&lang=en_US)

## Exlibris documentation on CZ records:

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/040Metadata\\_Management/120Contributing\\_to\\_the\\_Community\\_Zone\\_%E2%80%93\\_Bibliographic\\_Records](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/040Metadata_Management/120Contributing_to_the_Community_Zone_%E2%80%93_Bibliographic_Records)

[https://knowledge.exlibrisgroup.com/Alma/Training/02\\_What's\\_New\\_Videos\\_2015/11-February\\_2015\\_Release/Edit\\_a\\_Community\\_Zone\\_Record](https://knowledge.exlibrisgroup.com/Alma/Training/02_What's_New_Videos_2015/11-February_2015_Release/Edit_a_Community_Zone_Record)

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**Primo**

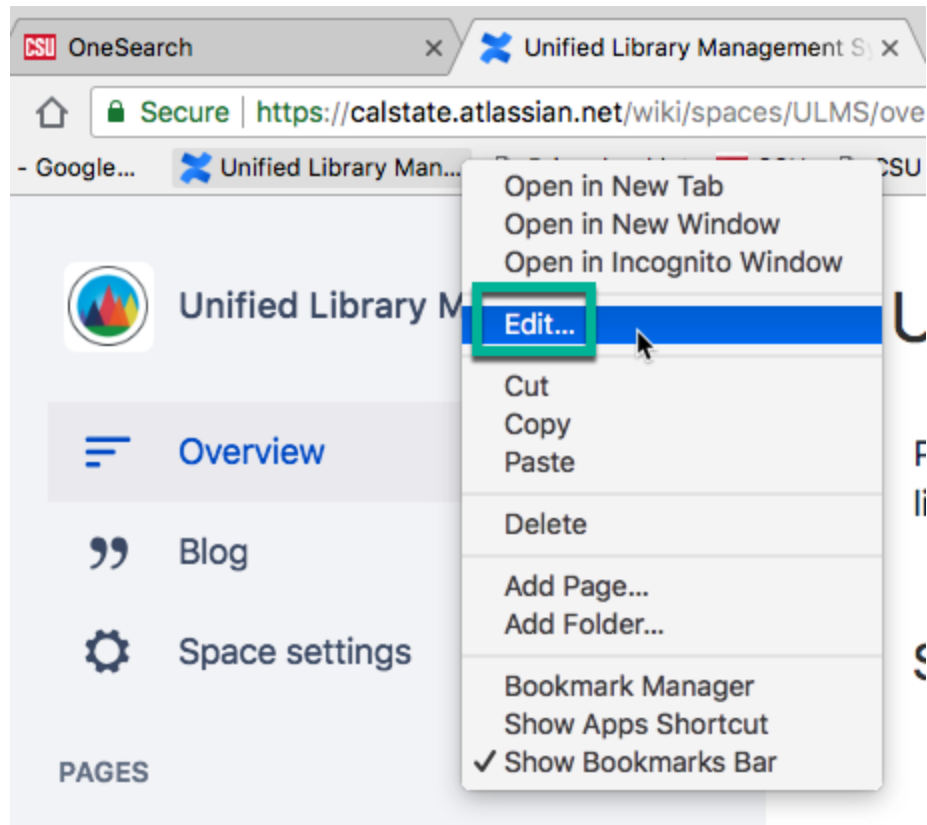
---



## Primo bookmarklet

In your web browser bookmark any website. (Screenshots below are from Chrome.)

Edit the bookmark.



## Replace the existing URL with

### Edit bookmark

Name

URL

▼ Bookmarks Bar

- Alma/Primo
- Programming

```
javascript:(function() { var showPnxLinkElem = document.querySelectorAll('prm-brief-result-container'), urlParamVid =
location.search.split('vid=')[1].split('&')[0]; function createLink (linkUrl, linkText) { var obj = document.createElement("a");
obj.setAttribute("href", linkUrl); obj.setAttribute("target", "_blank"); obj.style.margin = "0 0 0 2em"; obj.innerHTML = linkText; return obj; } for
(var i=0, j=showPnxLinkElem.length; i < j; i++) { var showPnxRecId =
showPnxLinkElem[i].querySelector('.list-item-primary-content').getAttribute('data-recordid'), resultItemChildren =
showPnxLinkElem[i].parentNode.childNodes, resultItemLastChild = resultItemChildren[resultItemChildren.length - 1], recordIdSpan =
document.createElement("span"), hrefBase =
showPnxLinkElem[i].querySelector('.media-thumbnail').querySelector('a').getAttribute('ng-href'), showSourceLinkHref =
hrefBase.replace(/fulldisplay/, "sourceRecord").replace(/docid/, "docId"), showSourceLink = createLink (showSourceLinkHref, "Show Source
Record"), showRISLinkHref = "../primo_library/libweb/action/display.do?doc="+showPnxRecId+"&vid="+urlParamVid+"&showRIS=true",
showRISLink = createLink (showRISLinkHref, "Show RIS"), showPnxLinkHref = hrefBase+"&showPnx=true"; var showPnxLink = createLink
(showPnxLinkHref, "Show Pnx"); recordIdSpan.className = "show-recordid"; recordIdSpan.innerHTML = showPnxRecId;
recordIdSpan.style.padding = "2em 0 0 0"; recordIdSpan.appendChild(showPnxLink); /* No Source-links for Third Node (PCI, EBSCO etc.)
records */ if (/^TN./.test(showPnxRecId) === false ) { recordIdSpan.appendChild(showSourceLink);
recordIdSpan.appendChild(showRISLink); } /* Append recordid and links only once */ if (resultItemLastChild.className !== 'show-recordid')
{ /* Prepend FRBR records with note */ if (showPnxLinkElem[i].querySelector('prm-search-result-frbr-line')) { var prefix =
document.createElement("strong"); prefix.innerHTML = 'FRBR preferred/generic record: '; showPnxLinkElem[i].appendChild(prefix); var
linebreak = document.createElement("br"); showPnxLinkElem[i].appendChild(linebreak); }
showPnxLinkElem[i].parentNode.appendChild(recordIdSpan); } } }());
```

You may rename the bookmark to "Primo bookmarklet" and it should look like

---

Edit bookmark

Name

Primo bookmarklet

URL

```
k); } showPnxLinkElem[()].parentNode.appendChild(recordIdSpan); } }));
```

▼ Bookmarks Bar

In Primo, when you are viewing a list of search results or looking at a full Primo record and you click on the Primo booklet bookmark, you have the option to

Show Pnx - display the [Primo normalized XML](#) record

Show Source Record - display the Marc bibliographic record

Show RIS - Research Information Systems citation format

Alternative: You can also append `&showPnx=true` to the Primo record url to view the PNX record.

[https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL5\\_ALMA71416540340002901&context=L&vid=01CAL5\\_UNO&lang=en\\_US&search\\_scope=EVERYTHING&adaptor=Local%20Search%20Engine&tab=everything&query=any,contains,biology&sortby=rank&offset=0&showPnx=true](https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL5_ALMA71416540340002901&context=L&vid=01CAL5_UNO&lang=en_US&search_scope=EVERYTHING&adaptor=Local%20Search%20Engine&tab=everything&query=any,contains,biology&sortby=rank&offset=0&showPnx=true)

# Search results list



biology X / CSUN Collections ▼

[ADVANCED SEARCH](#)

Sign in to get complete results and to request items [Sign in](#) | [DISMISS](#)

Refine my results

Sort by **Relevance** ▼



Show Only ^

- Available O... (6,587,031)
- Available at C... (11,865)
- Peer-revie... (4,320,170)
- Open Access

Resource Type ^

- Archival Materials (5)

PAGE 1 6,597,984 Results  Personalize

-  **BOOK**  
**Science workshop series. Biology**  
S Rosen (Seymour)  
©2000  
[Available at Teacher Curriculum Center Teacher Curriculum Center \(QH308.2 .R67 2000 grade 4-12\) >](#)  
01CAL\$ALMA71416540340002901 [Show Pnx](#) [Show Source Record](#) [Show RIS](#)
-  **JOURNAL**  
**Biology.**  
1983-1984  
[Online access >](#)  
01CAL\$ALMA51463015200002901 [Show Pnx](#) [Show Source Record](#) [Show RIS](#)
-

# Full record view

CSUN

Refine my

Sort by Rele

Show Only



BOOK  
**Science workshop series. Biology**  
S Rosen (Seymour)  
©2000

01CAL5\_ALMA71416540340002901

[Show Pnx](#) [Show Source Record](#) [Show RIS](#)

TOP

TOOLS

IN THE LIBRARY

LINKS

DETAILS

VIRTUAL BROWSE

## Tools



PERMALINK



CITATION



ENDNOTE



EXPORT RIS



EXPORT BIBTEX

# Permalink

Share a link to the Primo record you're talking about.

Tools



[https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL5\\_ALMA71411820960002901&context=L&vid=01CAL5\\_UNO&search\\_scope=CSU\\_PLUS\\_NO\\_FULLTEXT&tab=all\\_libraries&lang=en\\_US](https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL5_ALMA71411820960002901&context=L&vid=01CAL5_UNO&search_scope=CSU_PLUS_NO_FULLTEXT&tab=all_libraries&lang=en_US)

 COPY THE PERMALINK TO CLIPBOARD

## Source of records

When viewing the PNX record, in the <control> section there are several PNX fields (source format, source system) that identify the source of the Primo record.

The following record is from Alma and it is from a Marc bibliographic record.

```
<?xml version="1.0" encoding="UTF-8"?>
<record xmlns="http://www.exlibrisgroup.com/xsd/primo/primo_nm_bib"
  <control>
    <sourcerecordid>71416540340002901</sourcerecordid>
    <sourceid>01CALIS_ALMA</sourceid>
    <recordid>01CALIS_ALMA71416540340002901</recordid>
    <sourceformat>MARC21</sourceformat>
    <sourcesystem>Alma</sourcesystem>
    <almaid>01CALIS_NETWORK:71416540340002901</almaid>
    <almaid>01CALIS_UNO:2168015340002914</almaid>
  </control>
  <display>
```

## PNX record sections

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/Technical\\_Guide/010The\\_PNX\\_Record/010PNX\\_Record\\_Sections](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/010The_PNX_Record/010PNX_Record_Sections)



The following article is from Primo Central.

When I click on the Primo Bookmarklet, "Show Source Record" and "Show RIS" are not available.

[https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=TN\\_sciversesciencedirect\\_elsevierS0959-4388\(02\)00391-4&context=PC&vid=01CALIS\\_UNO&search\\_scope=EVERYTHING&tab=everything&lang=en\\_US](https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=TN_sciversesciencedirect_elsevierS0959-4388(02)00391-4&context=PC&vid=01CALIS_UNO&search_scope=EVERYTHING&tab=everything&lang=en_US)



ARTICLE / multiple sources exist. [see all](#)

### **Neurobiology**

Price, Jack ; Reber, Paul J ; Häusser, Michael ; Bezzi, Paola ; Wood, John N ; Bredt, David S ; Chafee, Matthew ; Merchant, Hugo ; Goodwin, Stephen ; Kyriacou, Bambos ; Kempermann, Gerd ; Winkler, Juergen  
Current Opinion in Neurobiology, 2002, Vol.12(6), pp.619-625

““ *intact animals? Neurobiology of... Neurobiology of disease (Kempermann and Winkler...* ””

 PEER REVIEWED

TOP

TOOLS

FRBR preferred/generic record:

TN\_sciversesciencedirect\_elsevierS0959-4388(02)00391-4

ONLINE ACCESS

[Show Pnx](#)

DETAILS

When you view the PNX record, there's less information in the <control> section.

[https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=TN\\_sciversesciencedirect\\_elsevierS0959-4388\(02\)00391-4&context=PC&vid=01CALIS\\_UNO&lang=en\\_US&search\\_scope=EVERYTHING&adaptor=primo\\_central\\_multiple\\_fe&tab=everything&query=any,contains,neurobiology%20price%20reber%20hausser&sortby=rank&offset=0&showPnx=true](https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=TN_sciversesciencedirect_elsevierS0959-4388(02)00391-4&context=PC&vid=01CALIS_UNO&lang=en_US&search_scope=EVERYTHING&adaptor=primo_central_multiple_fe&tab=everything&query=any,contains,neurobiology%20price%20reber%20hausser&sortby=rank&offset=0&showPnx=true)

```
<?xml version="1.0" encoding="UTF-8"?>
<record xmlns="http://www.exlibrisgroup.com/xsd/primo/primo_nm_bib" xmlns:sear='
  <control>
    <sourcerecordid>S0959-4388(02)00391-4</sourcerecordid>
    <sourceid>sciversesciencedirect_elsevier</sourceid>
    <recordid>TN_sciversesciencedirect_elsevierS0959-4388(02)00391-4</recordid>
    <sourcesystem>Other</sourcesystem>
  </control>
</display>
```

## Primo Central Index (non-Marc)

An index of scholarly material (primarily articles and ebooks) harvested from publishers and aggregators. The full text of resources is indexed for discovery.

[https://knowledge.exlibrisgroup.com/Primo\\_Central/Product\\_Documentation/PC\\_Index\\_Configuration\\_Guide/010Overview/010What\\_is\\_Primo\\_Central\\_Index%3F](https://knowledge.exlibrisgroup.com/Primo_Central/Product_Documentation/PC_Index_Configuration_Guide/010Overview/010What_is_Primo_Central_Index%3F)

"The records from PCI are standard PNX records that are normalized from the many different e-resources harvested by PCI."

[https://knowledge.exlibrisgroup.com/Primo\\_Central/Product\\_Documentation/PC\\_Index\\_Configuration\\_Guide/010Overview/020How\\_Does\\_Primo\\_Central\\_Index\\_Work%3F](https://knowledge.exlibrisgroup.com/Primo_Central/Product_Documentation/PC_Index_Configuration_Guide/010Overview/020How_Does_Primo_Central_Index_Work%3F)

You indicate which electronic collections you have access to by activating them in the PCI Back Office.

[https://knowledge.exlibrisgroup.com/Primo\\_Central/Product\\_Documentation/PC\\_Index\\_Configuration\\_Guide/020Primo\\_Central\\_Index\\_Registration/040My\\_Profile](https://knowledge.exlibrisgroup.com/Primo_Central/Product_Documentation/PC_Index_Configuration_Guide/020Primo_Central_Index_Registration/040My_Profile)

# Marc-based records

Marc-based bib records are translated from Marc to PNX through Primo normalization rules in the Primo Back Office (BO).

<b>Rule group</b>	display_title					
<b>Source</b>	Type	Field	Ind1	Ind2	Subfield	
MARC		245			Include	a <input checked="" type="checkbox"/> Enabled
<b>Conditions</b>	+ No conditions Specified					
<b>Transformations</b>	+ Transformation					
	Remove characters from the end	Parameter				
		/;:=				
<b>Action</b>	Behavior					
ADD						

---

<b>Rule group</b>	display_title					
<b>Source</b>	Type	Field	Ind1	Ind2	Subfield	
MARC		245			Include	b <input checked="" type="checkbox"/> Enabled

## Dedupe/Merge

Based on various criteria, Primo deduplicates and merges what it considers to be duplicate records.

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/Technical\\_Guide/030Duplicate\\_Detection\\_Process/030Duplicate\\_Detection\\_Vector#The\\_Deduped-Merged\\_Record](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/030Duplicate_Detection_Process/030Duplicate_Detection_Vector#The_Deduped-Merged_Record)

You can identify these records in the PNX record by looking for the <recordid> tag in the <control> section.

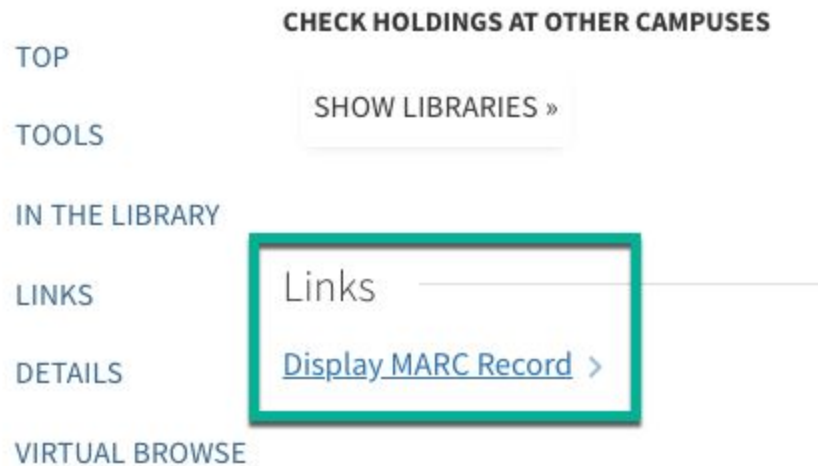
```
<control>
...
<recordid>dedupmrg751272026</recordid>
...
</control>
```

Another way to identify these records: if the Primo full record view, Details section, lists two or more OCLC numbers.

OCLC Number	42752759
	785989075

## Display Marc record

In Primo's full record view, in the Links section, you can display the Marc record (aka Display Source Record).



This lets you see all the records that have been deduped and merged by Primo.

The Primo bookmarklet's "Show Source Record" will only display one record even if it has been deduped and merged with other records.

The "Display Marc Record" url will indicate if the record has been deduped/merged.

NZ and CZ record deduped/merged:

[https://sdsu-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL\\_S\\_ALMA71388257520002901&context=L&vid=01CAL\\_S\\_SDL&search\\_scope=EVERYTHING&tab=everything&lang=en\\_US](https://sdsu-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL_S_ALMA71388257520002901&context=L&vid=01CAL_S_SDL&search_scope=EVERYTHING&tab=everything&lang=en_US)

Display Marc record

[https://sdsu-primo.hosted.exlibrisgroup.com/primo-explore/sourceRecord?vid=01CAL\\_S\\_SDL&docId=dedupmrg758284515](https://sdsu-primo.hosted.exlibrisgroup.com/primo-explore/sourceRecord?vid=01CAL_S_SDL&docId=dedupmrg758284515)

If "Display Marc Record" does not appear in your Primo view, your library's discovery person can add it in the back office.

Follow the steps 1-7 here:

<https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/586416144/Display+Fields+in+Primo+full+record+view>

Then in the "Links to display in full results" section, select "sourcerecord" and Create.

Then complete steps 10-13 to save and deploy your changes.

Viewing the Marc record can help you and others troubleshoot Primo data and its source.



IZ record deduped/merged with NZ record

An IZ-only record is not hidden from other campus's Primo.

In Alma, I can't see another campus' IZ record from my IZ.  
But in Primo's all-CSU scope, I can see all IZ and NZ records.

# Title: The New psychohistory

[https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL\\$ \\_ALMA71395084310002901&context=L&vid=01CAL\\$ \\_UNO&search\\_scope=CSU\\_PLUS\\_NO\\_FULLTEXT&tab=all\\_libraries&lang=en\\_US](https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL$ _ALMA71395084310002901&context=L&vid=01CAL$ _UNO&search_scope=CSU_PLUS_NO_FULLTEXT&tab=all_libraries&lang=en_US)

## Record #1 (NZ)

```
Leader 02561cam a2200553 i 4500
001 991061776089702901
005 20180809071912.3
008 760423s1975 nyua b 000 0 eng
010 ##$a 75014687
015 ##$a761548491$2can
016 7#$a7700951$2DNLM
016 ##$a(AMICUS)000000614056
019 ##$a2890647
020 ##$a0914434012
020 ##$a9780914434016
035 ##$aocm01904382-01cals_network
035 ##$a(OCOLC)01904382$z(OCOLC)2890647
035 ##$a(OCOLC)ocm01904382
040 ##$aDLC$beng$cDLC$dVJA$dTJM$dMUQ$dNLGGC
```

## Record #2 (IZ)

```
Leader 01546nam a2200277 i 4500
001 991000502789702914
005 1996070960029.0
008 751229s19759999nyua 00010deng d
010 ##$a75014687
020 ##$a0914434012
035 ##$a(cnos)b12661089-01cals_uno
040 ##$aVJA$cVJA$dCNO
```

In Alma, there are two separate bibliographic records

1	 <b>The New psychohistory / Lloyd deMause, editor.</b> <b>Book {Book - Physical} text: unmediated; volume</b> By DeMause, Lloyd. (New York : Psychohistory Press ©1975.) <b>Subject:</b> Famous Persons. History. Psychoanalytic Interpretation. and others	<b>Language:</b> English <b>ISBN:</b> 0914434012 and others <b>Record number:</b> ocm01904382-01cals_network <b>Update Date:</b> 08/09/2018	<b>MMS ID:</b> 991002883469702914
	<input checked="" type="radio"/> Physical (1) <input type="radio"/> Electronic <input type="radio"/> Digital <input type="radio"/> Other details		
2	<b>The New psychohistory . / Lloyd deMause, editor.</b> <b>Book {Book - Physical}</b> By DeMause, Lloyd. (New York : The Psychohistory Press c1975.) <b>Subject:</b> History--Psychological aspects. Statesmen--Biography.	<b>Language:</b> English <b>ISBN:</b> 0914434012 <b>Record number:</b> (cnos)b12661089-01cals_uno <b>Update Date:</b> 06/14/2018	<b>MMS ID:</b> 991000502789702914
	<input checked="" type="radio"/> Physical (1) <input type="radio"/> Electronic <input type="radio"/> Digital <input type="radio"/> Other details		

In Primo, these display as a deduped/merged record

[https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CALS\\_ALMA71395084310002901&context=L&vid=01CALS\\_UNO&search\\_scope=CSU\\_PLUS\\_NO\\_FULLTEXT&tab=all\\_libraries&lang=en\\_US](https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CALS_ALMA71395084310002901&context=L&vid=01CALS_UNO&search_scope=CSU_PLUS_NO_FULLTEXT&tab=all_libraries&lang=en_US)

OCLC Number	01904382
Institution Zone ID	991002883469702914 991000502789702914

## Dedupe Marc-based records and Primo Central?

"Records from Primo Central can't be deduplicated ... with local records. They are not stored locally and the Primo Central data are identical for every customer."

[https://knowledge.exlibrisgroup.com/Primo/Knowledge\\_Articles/Is\\_it\\_possible\\_to\\_FRBR\\_or\\_Dedup\\_local\\_records\\_with\\_Prime\\_Central\\_records](https://knowledge.exlibrisgroup.com/Primo/Knowledge_Articles/Is_it_possible_to_FRBR_or_Dedup_local_records_with_Prime_Central_records)

---

# Troubleshooting

---

## Compare Primo views

When you're troubleshooting display in Primo, it helps to view the record in your campus view as and at other campuses. Be sure to use the all CSU scope.

Comparing the views can help you determine if an issue is a campus-level configuration or systemwide configuration.

### List of CSU Primo instances

<https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/78291823/CSU+Primo+Instances>

Also it helps to have one browser window with Alma and the other with Primo to compare the data source and how it displays.

Example:

My Primo display is missing the uniform title.

Details

---

<b>Title</b>	Erosion Control.
<b>Language</b>	English
<b>Includes</b>	<a href="#">NAC materials.</a> >
<b>Related Works</b>	<a href="#">ENV collection item.</a> >
<b>Source</b>	California State University

But the same record displays uniform title in another campus's view.

Details

---

<b>Title</b>	Erosion Control.
<b>Uniform Title</b>	Erosion Control (ENV version)
<b>Language</b>	English
<b>Related Works</b>	<a href="#">ENV collection item.</a> >
<b>Includes</b>	<a href="#">NAC materials.</a> >
<b>Source</b>	California State University

I may have to make changes in Primo Back Office in my campus's Main View.



Display fields in Primo full record view (local configuration)

<https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/586416144/Display+Fields+in+Primo+full+record+view>

Bonus: you can even add the uniform title to your brief results.

---

2  BOOK  
**Erosion Control.**  
Erosion Control (ENV version)  
Available at University Library Compact Shelving/1st floor (NAC7560 .E77 ) >

Or even the edition statement.

---

3  BOOK  
**Campbell biology**  
Lisa A. Urry author 2017 Eleventh edition.  
Available at Library 2 hr Reserves (1st I

Tip: Test in the sandbox before implementing in production.

# Scenarios

Harry Potter and the sorcerer's stone.

Where is

"Arizona Young Readers' Award Winners: Middle School/YA Book, 2000"  
coming from?

[https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CALIS\\_ALMA71388440770002901&context=L&vid=01CALIS\\_UNO&search\\_scope=EVERYTHING&tab=everything&lang=en\\_US](https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CALIS_ALMA71388440770002901&context=L&vid=01CALIS_UNO&search_scope=EVERYTHING&tab=everything&lang=en_US)

# Alma resource not in Primo

Title/Author: Asian Americans and the media / Kent A. Ono and Vincent N. Pham.

OCLC: 236321398

MMS ID: 991046483579702901

ISBN: 9780745642734, 9780745642741

1	<b>Asian Americans and the media / Kent A. Ono and Vincent N. Pham.</b>	Ed
	<b>Book {Book - Physical} text; unmediated; volume</b> By Ono, Kent A., (Cambridge, UK ; Polity 2009.)	<b>Language:</b> English
	<b>Subject:</b> Mass media and minorities--United States. Asian American mass media. Asian Americans and mass media. and others	<b>ISBN:</b> 9780745642734 and others
	<b>Series:</b> Media and minorities (Polity Press)	<b>Record number:</b> ocn236321398-01cals_network
		<b>Update Date:</b> 08/09/2018
	Physical	Electronic
	Digital	Held by (15)
	Other details	
	Chico Long Beach Northridge San Diego San Marcos	Fresno Los Angeles Pomona San Francisco Sonoma
	Fullerton Monterey Bay Sacramento San Jose Stanislaus	

## Things I checked:

- various Primo instances using the institution-specific and consortia-wide scope (I searched by [title](#), [isbn](#), [oclc number](#) but cannot retrieve the resource in Primo),
- the bib record in Alma to verify that it was not suppressed, (I don't see the eye-with-the-slash icon in repository search. management tags in Metadata Editor: not suppressed.)
- Network publishing job (Alma) running successfully
- 01CALIS\_ALMA pipe (Primo Back Office) is also running successfully
- Also exported Worldcat master record from Connexion to NZ

Ultimately none of the above worked and San Francisco opened a Salesforce case (00579586).

## Portfolio on print title

In Primo, online availability is displaying on a print resource.

The online resource is unrelated to the print resource.



BOOK  
**Golden fool**  
Robin Hobb author  
2003



TOP

SEND TO

Send to \_\_\_\_\_

AVAILABLE ONLINE



EXPORT BIBTEX



EXPORT RIS



ENDNOTE



CITATION



PERMALINK



PRINT



E-MAIL



TEXT


IN THE LIBRARY


DETAILS


LINKS

VIRTUAL BROWSE

Available Online \_\_\_\_\_

Sign-in for more options  Sign in

Something not working?  Report a Problem

Full text available at: [view full text](#) 

Public notes:

View this online. [International Science Fiction DataBase](#) resource description

In the Library \_\_\_\_\_

**REQUEST OPTIONS:**

[Special Collections](#) > [Special Collections](#) > [PS3558.O33636 G65 2003](#)

(1 copy, 1 available, 0 requests)

 LOCATE

[Special Collections](#) > [Special Collections](#) > [PS3558.O33636 G65 2003bc](#)

(1 copy, 1 available, 0 requests)

 LOCATE

Use identifiers in Primo record to locate the record in Alma.  
IZ MMS IDs are the most precise.

Identifier	ISBN : 0553801511 ISBN : 9780553801514
OCLC Number	946596249 49894501
Local Note	Gift of Walter L. Fisher II, 2013 Special Collections copy 1 isbn 0553801511 (hardback) Special Collections copy 1 gift of Michael and Susan Watson, 2014
Genre	<a href="#">Fantasy fiction &gt;</a> <a href="#">Science fiction &gt;</a>
Institution Zone ID	991017511609702917 991023463921002917
Network Zone ID	991038650629702901 991069512312102901
Source	California State University

991017511609702917

991023463921002917

Searching by MMS ID in Alma, I see an electronic portfolio attached to the print record.

The screenshot shows the Alma library system interface. At the top, there is a search bar with 'All titles' selected and 'Keywords' as the search type. A search icon and 'Advanced' options are visible. Below the search bar, the results are displayed as 'All Titles (1 - 1 of 1)' with a 'Save Query' button. The interface includes tabs for 'Institution', 'Network', and 'Community'. Sorting options are set to 'Rank' for both primary and secondary sorts. An 'Expand: Physical' button is present. The main record is for 'Golden fool / Robin Hobb.' with options for 'Edit Record', 'Portfolio List', and a menu icon. The record details include: Book {Book - Physical} text; unmediated; volume By Hobb, Robin, (New York : Bantam Books, 2003); Subject: Fantasy fiction. Science fiction.; Series: Hobb, Robin. Tawny man ; bk. 2.; Language: English; ISBN: 0553801511 and others; Record number: ocn946596249-01cals\_network; Update Date: 04/16/2018; MMS ID: 991017511609702917. Below the record details, there are radio buttons for 'Physical (1)', 'Electronic (1)', and 'Digital'. The 'Electronic (1)' option is selected and highlighted with a red box. Underneath, it says '1 Portfolio | 1 of 1 portfolios are available'. A table shows the portfolio details:

Interface Name	Collection Name	Service Type	Availability	Portfolio
-	-	-	● Active	View


At the bottom, there is a 'Portfolio List' link.



# Electronic portfolio editor

Electronic Portfolio Editor

Relink to another bibliographic record   Attach to an electronic collection   Cancel   Save

 Golden fool / Hobb, Robin, author. Bantam Books, New York : 2003 [9780553801514] ⓘ ⌵

Interface name -

Bib material type Book   Service ID 52327684830002917  
Portfolio ID 53327684820002917

General   Linking   Coverage   Acquisition   Notes   History

URL <http://www.isfdb.org/cgi-bin/pl.cgi?292401>

URL type  Static URL    Dynamic URL

Static URL

Proxy enabled  No    Yes

Proxy selected

Test access

Removing the eportfolio (or relinking it to another bib record) should resolve the issue.

## Dedupe/Merge

News (various CSUN department newsletters deduped/merged in Primo)

[https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CALIS\\_ALMA71464417970002901&context=L&vid=01CALIS\\_UNO&search\\_scope=EVERYTHING&tab=everything&lang=en\\_US](https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CALIS_ALMA71464417970002901&context=L&vid=01CALIS_UNO&search_scope=EVERYTHING&tab=everything&lang=en_US)

College of Education,

School of the Arts,

School of Science and Mathematics,







School of Communication, Health and Human Services,

School of Social and Behavioral Science,

School of Business Administration and Economics

<b>OCLC Number</b>	984755026
	994298106
	984751244
	993601092
	984751722
	994301130
<b>Institution Zone ID</b>	991002177279702914
	991012320909702914
	991002176929702914
	991012320509102914
	991002176989702914
	991012320909602914

**REQUEST OPTIONS (REQUIRES SIGN IN):**

Year	All	Volume	All	Description	All	
<a href="#">Special Collections &amp; Archives</a>	›	<a href="#">Special Collections Folio/Oversize</a>	›	<a href="#">LD729.6.N6 S35</a>	 <a href="#">MAP IT!</a>	
<a href="#">Special Collections &amp; Archives</a>	›	<a href="#">Special Collections Folio/Oversize</a>	›	<a href="#">LD729.6.N6 S63</a>	 <a href="#">MAP IT!</a>	
<a href="#">Special Collections &amp; Archives</a>	›	<a href="#">Special Collections Folio/Oversize</a>	›	<a href="#">LD729.6.N6 B87</a>	 <a href="#">MAP IT!</a>	
<a href="#">Special Collections &amp; Archives</a>	›	<a href="#">Special Collections Folio/Oversize</a>	›	<a href="#">LD729.6.N6 A88</a>	 <a href="#">MAP IT!</a>	
<a href="#">Special Collections &amp; Archives</a>	›	<a href="#">Special Collections Folio/Oversize</a>	›	<a href="#">LD729.6.N6 C64</a>	 <a href="#">MAP IT!</a>	
<a href="#">Special Collections &amp; Archives</a>	›	<a href="#">Special Collections Folio/Oversize</a>	›	<a href="#">LD729.6.N6 E38</a>	 <a href="#">MAP IT!</a>	

Because of dedupe/merge it's difficult to determine which holdings record belongs to which school's newsletter?

To determine why these records are deduping/merging, we use the Dedup Test Utility.

In the back office, go to Primo Utilities, Systems Tests & Monitor, Dedup Test Utility.

Enter the Record ID's of two record. The record ID's are available in the PNX record, in the <control> section, under <sourceid> \$ O.

<control>

...

```
<sourceid>$$V01CAL$ _ALMA$$O01CAL$ _ALMA71464417970002901</sourceid>  
<sourceid>$$V01CAL$ _ALMA$$O01CAL$ _ALMA71468821000002901</sourceid>
```

...

</control>

01CAL\$ \_ALMA71464417970002901

01CAL\$ \_ALMA71468821000002901

[https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL\\$ \\_ALMA71464417970002901&context=L&vid=01CAL\\$ \\_UNO&lang=en\\_ US&tab=everything&query=any,contains,994298106&offset=0&showPnx=true](https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL$ _ALMA71464417970002901&context=L&vid=01CAL$ _UNO&lang=en_ US&tab=everything&query=any,contains,994298106&offset=0&showPnx=true)

## > DEDUP test utility

Record ID1: \* 01CAL5\_ALMA71464417970002901

Record ID2: \* 01CAL5\_ALMA71468821000002901



Candidates: **Candidates**

Result: **Match**

Dedup type: **serialMatcher**

**Please notice that a record with more than 150 dedup candidates, won't be deduped**

Field Name	Value 1	Value 2	Is Match
C3	news	news	<b>Match</b>
C4	northridge	northridge	<b>Match</b>
C5	991067879525902901	991067940720002901	<b>No Match</b>

Candidates phase then matching stage

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/Technical\\_Guide/030Duplicate\\_Detection\\_Process/030Duplicate\\_Detection\\_Vector](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/030Duplicate_Detection_Process/030Duplicate_Detection_Vector)

HANDLER	CDLLongTitle	<b>Fields</b>	<b>Values1</b>	<b>Values2</b>	<b>Points</b>
		f7	news	news	600
		f8	news	news	600
HANDLER	CDLCountryOfPub	<b>Fields</b>	<b>Values1</b>	<b>Values2</b>	<b>Points</b>
		f9	cau	cau	40
HANDLER	CDLPlaceOfPub	<b>Fields</b>	<b>Values1</b>	<b>Values2</b>	<b>Points</b>
		f10	northridge	northridge	200
HANDLER	CDLMainEntry_se	<b>Fields</b>	<b>Values1</b>		
		f11	news california state university northridge c		
THRESHOLD	tr2	<b>Points</b>	<b>Upper</b>	<b>Lower</b>	<b>Decision</b>
		890	800	null	MATCH

If the points total is greater than or equal to 800, Primo considers them to be a match.

What does a non-match look like?

01CALIS\_ALMA71379441670002901

01CALIS\_ALMA71468821000002901

> **DEDUP test utility**

Record ID1: \*

Record ID2: \*



Candidates: **Not Candidates**

Result: **No Match**

Dedup type: **nonSerialMatcher**

## Local fields

Verifying the correct encoding of local fields.

(59x, 69x, 9xx with \$9 LOCAL)

Primo display of local fields in IZ-only records

<https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/133693454/Display+of+Local+Fields+from+IZ+Records+in+Primo>

Example: The complete Laurindo Almeida anthology of guitar solos  
isbn: 9780786661831, oclc: 49807265



Northridge's Primo view displays its local fields (local collection title, local note)

[https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL\\$ALMA71416680890002901&context=L&vid=01CAL\\$UNO&search\\_scope=CSU\\_PLUS\\_NO\\_FULLTEXT&tab=all\\_libraries&lang=en\\_US](https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL$ALMA71416680890002901&context=L&vid=01CAL$UNO&search_scope=CSU_PLUS_NO_FULLTEXT&tab=all_libraries&lang=en_US)

<b>Publisher</b>	Pacific, MO : Mel Bay
<b>Creation Date</b>	©2001
<b>Collection</b>	<a href="#">International Guitar Research Archive (IGRA)</a> >
<b>Format</b>	1 score (175 pages) ; 30 cm.
<b>Contributors</b>	<a href="#">Ron Purcell</a> >
<b>Identifier</b>	ISBN : 0786661836 ISBN : 9780786661831 ISMN : 796279079525 Dewey : 787.87
<b>OCLC Number</b>	49807265
<b>Local Note</b>	Ronald C. Purcell; Gift.; 2002.
<b>Institution Zone ID</b>	991011022159702914
<b>Source</b>	California State University

Display Marc Record

591 0# \$a Ronald C. Purcell; \$cGift.; 2002. \$9LOCAL \$A01CAL\$UNO

973 0# \$a International Guitar Research Archive (IGRA) \$9LOCAL \$A01CAL\$UNO

While in Fullerton's Primo view, you cannot see Northridge's local fields

[https://csuf-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL\\$ALMA71416680890002901&context=L&vid=01CAL\\$FUL&search\\_scope=EVERYTHING&tab=everything&lang=en\\_US](https://csuf-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL$ALMA71416680890002901&context=L&vid=01CAL$FUL&search_scope=EVERYTHING&tab=everything&lang=en_US)

<b>Publisher</b>	Pacific, MO : Mel Bay
<b>Dates</b>	©2001
<b>Format</b>	1 score (175 pages) ; 30 cm.
<b>Contributors</b>	Ron Purcell >
<b>Identifier</b>	ISBN : 0786661836 ISBN : 9780786661831 ISMN : 796279079525 Dewey : 787.87
<b>OCLC Number</b>	49807265
<b>Network Zone ID</b>	991006122709702901
<b>Source</b>	California State University

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# Resource Management Group Meeting

1:00-2:15pm

## NACO funnel (Samuel Barber)

### Name Authority Cooperative

"Through this program, participants contribute authority records for personal, corporate, and jurisdictional names, uniform titles, and series to the LC/NACO Authority File"

<https://www.loc.gov/aba/pcc/naco/nacofunnel.html>

"A NACO funnel project is a group of libraries that have joined together to contribute name authority records to the national authority file. Frequently, funnel members create records in modest numbers, and consolidate their efforts to make a more significant contribution in terms of quantity."

### **Deadline to register interest:**

**end of day August 15 Wednesday to Samuel Barber [sbarber@fullerton.edu](mailto:sbarber@fullerton.edu)**

Workshop schedule: Sept 6-27, 2018

<https://docs.google.com/document/d/1gDIC6hoagr7PPcx1nntWG4FI0pY0D41kWCMvj52B3wl/edit?usp=sharing>

# Resource management manual

Due to the challenges finding “all” information related to procedures and best practices for cataloging, the Committee decided to focus on the creation of a “Resource Management Manual.” The manual will be based on the New Staff Training Group for Resource Management (Orbis Cascade Alliance).

[https://www.orbiscascade.org/file\\_viewer.php?id=4713](https://www.orbiscascade.org/file_viewer.php?id=4713)

# Resource Management Q and A

1

## **What is the most accurate shelflisting method?**

Analytics report (from Alma list)

<https://exlibrisusers.org/cgi-bin/mailman/private/alma/2018-January/034083.html>

Powerpoint presentation:

<https://exlibrisusers.org/private/alma/attachments/20180109/10e5c1f2/HowtoinventoryEagles.pptx>

# Physical Items subject area

The screenshot displays the 'Shelflisting (mbj)' application interface. At the top, there is a navigation bar with 'Home', 'Catalog', and 'Favorites' links. Below this, a 'Criteria' tab is active, with sub-tabs for 'Results', 'Prompts', and 'Advanced'. The main area is divided into two panes. The left pane, titled 'Subject Areas', shows a tree view under 'Physical Items' with sub-categories: Physical Item Details, Holding Details, Item Creation Date, Item Modification Date, Library Unit, Location, Temporary Location, Bibliographic Details, LC Classifications, Dewey Classifications, PO Line, Fund Information, and Institution. The right pane, titled 'Selected Columns', contains instructions: 'Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, fi the button next to its name.' Below the instructions is a table of selected columns:

Physical Item Details	Holding Details	Physical Item Details	Bibliographic Details	Location
Barcode	1 Permanent Call Number	2 Description	Title	Location Name

Below the table, the text 'Barcode, Call Number, Description, Title, Location Name' is displayed in a large, bold, black font with a white outline. Underneath, a 'Filters' section contains the instruction: 'Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane hea in the catalog pane.' A single filter is listed: 'Location Name is equal to / is in Special Collections Elephant Folio'.

Alternative:

Create a set of Physical Items in Alma (by library/location) then export the physical items to Excel.

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/050Administration/070Managing\\_Jobs/020Running\\_Manual\\_Jobs\\_on\\_Defined\\_Sets](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/020Running_Manual_Jobs_on_Defined_Sets)

The spreadsheet contains barcode, title and call number.



2

**How do you keep accurate statistics on how many titles and items the Cataloging Unit has done in one month? (The bib records, holdings and items are dropped in by Acquisitions, so we often are just checking what is there.) Is there a way to count the originals cataloged in a month?**

How does your library keep track of who cataloged a record?

CSUN uses the 974 local field.

<https://calstate.atlassian.net/wiki/spaces/ULMST/pages/78172584/Local+Fields+in+Alma+Primo>

## Repository search:

All titles ▾ Zone:  Institution  Network  Community ✕

Cataloger's Initials (974) ▾ Contains Keywords ▾ mbj + 📄 ✕

**AND** OR MMS Creation Date (Title) ▾ After ▾ 01/01/2018 ✕ 📅 + 📄 ✕

Clear form Search

All Titles (1 - 18 of 18) Save Query

where (c.search.index\_names.local\_field\_974 contains keywords "mbj" AND MMS Creation Date (Title) after "2018-01-01")

Institution  Network  Community

Sort by: Rank ▾ Secondary Sort by: Rank ▾ Expand ▾ 📄 ⚙️

1 👤 **ACI collection of concrete codes, specifications, and practices.** Edit Record Holdings ⋮

Journal {Other Serial - Physical} text; unmediated; volume Language: English 🛒 Orders: 1

Exlibris documentation on how to configure search indexes:

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/080Configuring\\_Resource\\_Management/020Configuring\\_Search#Configuring\\_Search\\_Indexes](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/080Configuring_Resource_Management/020Configuring_Search#Configuring_Search_Indexes)

# Analytics

## Subject Area: Physical Items or Titles

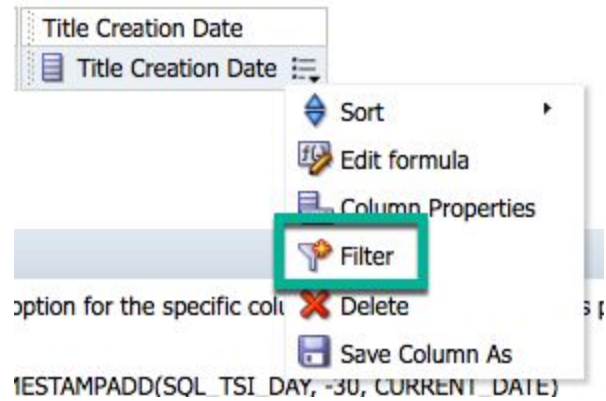
The screenshot shows a web-based interface for cataloging statistics. The main title is "Cataloging statistics, by Creation Date". The interface is divided into several sections:

- Criteria:** Includes tabs for "Criteria", "Results", "Prompts", and "Advanced".
- Subject Areas:** A tree view on the left showing a hierarchy of folders under "Titles", including "Title Measures", "Usage Measures", "Usage Measures - Last Year (365)", "Title Details", "Bibliographic Details", "Title Creation Date", "Title Modification Date", "Dewey Classifications", "LC Classifications", and "Institution".
- Selected Columns:** A central pane with instructions: "Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to re-order formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name." It contains two columns: "Bibliographic Details" and "Title Creation Date". The "Bibliographic Details" column lists "Create Date", "MMS Id", "Title", and "Creator". The "Title Creation Date" column lists "Title Creation Date".
- Filters:** A section with instructions: "Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on Add a saved filter by clicking on add button after selecting its name in the catalog pane." It shows a filter rule: "Title Creation Date"."Title Creation Date" >= TIMESTAMPADD(SQL\_TSI\_DAY, -30, CURRENT\_DATE). The filter text is highlighted in yellow.

**Create Date, MMS ID, Title, Title Creation Date**

## How to use SQL filter

Select the data field. Then Filter.



Check: Convert this filter to SQL. OK.

**New Filter**

Column: Title Creation Date

Operator: is equal to / is in

Value: [Empty text box]

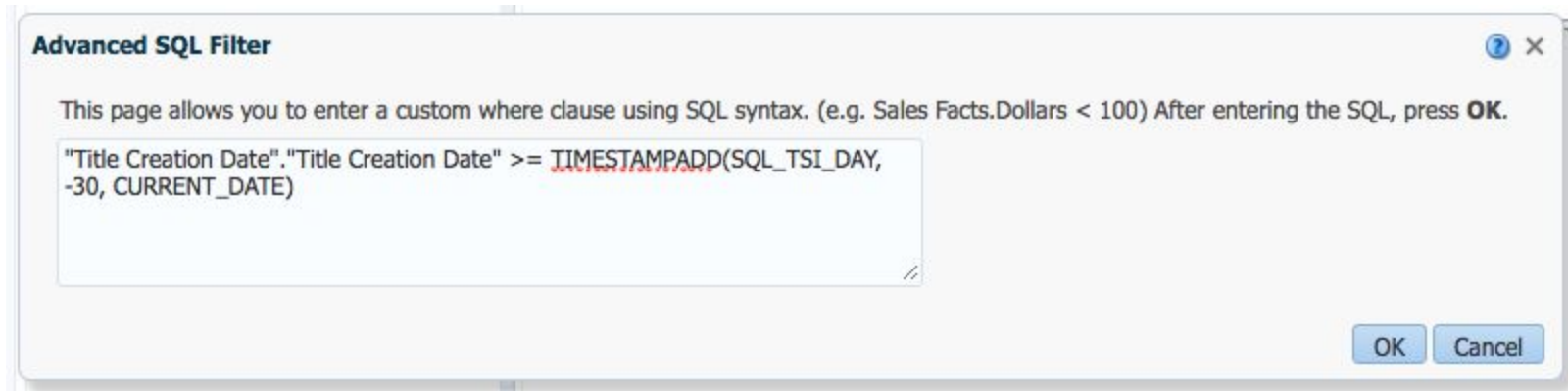
Protect Filter

Convert this filter to SQL

Input your SQL filter. OK.

Example: (filtering by title creation date within the last 30 days)

```
"Title Creation Date"."Title Creation Date" >=
TIMESTAMPADD(SQL_TSI_DAY, -30, CURRENT_DATE)
```



## Exlibris documentation:

[https://knowledge.exlibrisgroup.com/@api/deki/files/48630/Analytics\\_-\\_How\\_to\\_use\\_the\\_TIMESTAMPADD\\_parameter\\_to\\_retrieve\\_by\\_today\\_-\\_X\\_time\\_in\\_an\\_Alma\\_Analytics\\_report.pptx](https://knowledge.exlibrisgroup.com/@api/deki/files/48630/Analytics_-_How_to_use_the_TIMESTAMPADD_parameter_to_retrieve_by_today_-_X_time_in_an_Alma_Analytics_report.pptx)

[https://knowledge.exlibrisgroup.com/Alma/Knowledge\\_Articles/Analytics\\_-\\_retrieving\\_records\\_based\\_on\\_criteria\\_of\\_%22x\\_days\\_before\\_today%22](https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Analytics_-_retrieving_records_based_on_criteria_of_%22x_days_before_today%22)

If your campus uses a 9xx field for cataloger's initials, you may index this field as a local parameter in Analytics.

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/080Analytics/080Shared\\_Dimensions/010Bibliographic\\_Details](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/080Shared_Dimensions/010Bibliographic_Details)

Or if Purchase Order Lines are a more accurate measure, you can model the above report but in the Funds Expenditure subject area.

The screenshot shows a web-based interface for cataloging statistics. The main title is "Cataloging statistics, by PO line". The interface is divided into several sections:

- Criteria:** Includes tabs for "Criteria", "Results", "Prompts", and "Advanced".
- Subject Areas:** A tree view on the left showing a hierarchy of folders under "Funds Expenditure", including "Fund Transactions", "Fund Transaction Details", "Transaction Date", "Fiscal Period", "Library Unit", "Reporting Code", "LC Classifications", "Dewey Classifications", "Fund Ledger", "Vendor", "PO Line", "PO Line Type", "PO Line License", "Invoice Line", and "Bibliographic Details".
- Selected Columns:** A section on the right with a header "Selected Columns" and a sub-header "Bibliographic Details". It contains a list of columns: "PO Line", "PO Line Creation Date", "Creation Date", "MMS Id", and "Title".
- Filters:** A section at the bottom with a header "Filters" and a single filter rule: "PO Line"."PO Line Creation Date" >= TIMESTAMPADD(SQL\_TSI\_DAY, -30, CURRENT\_DATE)".

Overlaid on the "Selected Columns" section is the text: **PO Line Creation Date, Creation Date, MMS ID, Title**.

Depending on your cataloging workflow, original cataloging may be better measured elsewhere. Or maybe using an Alma set of bibliographic created after a certain date and then filtering by 040 \$a and \$c equal to your OCLC symbol.



3

In Primo, how to add links to photographs of 3d Objects and possibly embed the images in Alma/Primo display.

I don't know of a way to display local images as thumbnails in Alma.

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/080Configuring\\_Resource\\_Management/020Configuring\\_Search#Customizing\\_the\\_Thumbnail\\_Display](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/080Configuring_Resource_Management/020Configuring_Search#Customizing_the_Thumbnail_Display)

## Example in Primo:

[https://fresnostate-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL5\\_ALMA71414944870002901&context=L&vid=01CAL5\\_UFR&search\\_scope=EVERYTHING&tab=everything&lang=en\\_US](https://fresnostate-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL5_ALMA71414944870002901&context=L&vid=01CAL5_UFR&search_scope=EVERYTHING&tab=everything&lang=en_US)

Sacramento uses the 956 local field to provide links to donor info in Primo.

[https://csus-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL5\\_ALMA71405873690002901&context=L&vid=01CAL5\\_USL&search\\_scope=01CAL5\\_USL&tab=books\\_local&lang=en\\_US](https://csus-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL5_ALMA71405873690002901&context=L&vid=01CAL5_USL&search_scope=01CAL5_USL&tab=books_local&lang=en_US)

### Links

[Inhaltsverzeichnis](#) >

[Gift of the Friends of the Library](#) >

[This Item in WorldCat®](#) >

[Display Source Record](#) >

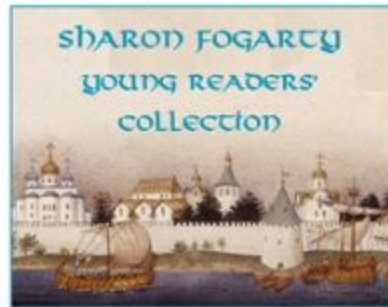
You may also want to explore how CSUN implemented its bookplates using the 975 local field.

OCLC 857774066

[https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL5\\_ALMA71385048920002901&context=L&vid=01CAL5\\_UNO&search\\_scope=EVERYTHING&tab=everything&lang=en\\_US](https://csun-primo.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL5_ALMA71385048920002901&context=L&vid=01CAL5_UNO&search_scope=EVERYTHING&tab=everything&lang=en_US)

Digital Bookplates

Generously Provided By: Tish Fogarty & David Svaboda



You'll want to work with your discovery person and test in the sandbox.

## Additional info

### Display of Marc fields in Primo

<https://calstate.atlassian.net/wiki/spaces/ULMST/pages/66420849/Suppression+or+Display+of+MARC+Fields+in+OCLC+Records+in+Primo>

### Local fields in Alma and Primo

<https://calstate.atlassian.net/wiki/spaces/ULMST/pages/78172584/Local+Fields+in+Alma+Primo>

4

We need to have "See" and "See also" (4XX and 5XX) from Authority records to display in Primo, directing patrons to the correct form of headings and related forms of headings. Currently they do not display, even if the cross-references are taking the patron from an incorrect heading to a correct heading.

See TS Open Forum (08/09/2018)

<https://calstate.atlassian.net/wiki/spaces/URM/pages/144572459/Technical+Services+Open+Forum>

Related thread on Alma-list

<https://exlibrisusers.org/cgi-bin/mailman/private/alma/2018-July/038256.html>

5

Will we review authority work responsibilities, workflows and expectations for the CSU catalogers that will not be part of the NACO funnel?

*For libraries that are not participating in the NACO funnel, I don't know that your cataloging workflows will necessarily change. Please see the floor bibliographic standards:*

<https://calstate.atlassian.net/wiki/spaces/ULMS/pages/61112881/Floor+Bibliographic+Standards>

*What we did when I was at CSUN: when performing original cataloging in Connexion, I checked authority records for personal names and added "distinguishing" information such as \$d dates associated with a name or \$c titles and other words associated with a name.*

*See oclc 933733861 (Marc 100 field), 23604385 (110), 860810020 (100, 700), 932012202 (100), 1013887660 (100 \$c)*

*If your library currently does perform authority work, I don't know if this work will be impacted by the NACO funnel.*

We are investigating how best to approach systemwide authority control and the Alma functionality necessary to accomplish this.

**Additional questions?**

# Problem reporting forms

<https://calstate.atlassian.net/wiki/spaces/ULMST/pages/80683328/NZ+Problem+Reporting>

## 1. Network Zone Problem Reporting

Report problems with or questions on bibliographic records (duplicates, OCLC numbers, importing records)

## 2. NZ ERM Problem Reporting

Report problems with or questions on electronic resources (access issues, authentication, full-text, coverage dates)

If you're unsure, ask on Slack and we'll direct you to right place.



## Identifying duplicate NZ records

In a repository search  
you find 2 or more NZ records with the same OCLC number,  
neither record is linked to a CZ record,  
and the NZ records have distinct MMS IDs.

All titles ▾

Keywords ▾

35601489



All Titles (1 - 2 of 2)

35601489

Sort by : Rank ▾

Secondary Sort by : Rank ▾

1 **The Bannock of Idaho / Brigham D. Madsen ; illustrated by Maynard Dixon Stewart.**

**Book {Book - Physical} text; unmediated; volume** By Madsen, Brigham D. (Moscow, Idaho : University of Idaho Press 1996.)

**Subject:** Bannock Indians--History. Bannock Indians. Geschichte--1700-1900 and others

**Series:** Idaho yesterdays (Moscow, Idaho)

**Edition:** Pbk. ed.

**Language:** English

**ISBN:** 0893011894 and others

**Record number:**  
(OCoLC) 35601489

**Update Date:** 08/09/2018

**MMS ID:**  
991069732017202901

Physical

Electronic

Digital

Held by

Other details

2 **The Bannock of Idaho / Brigham D. Madsen ; illustrated by Maynard Dixon Stewart.**

**Book {Book - Physical} text; unmediated; volume** By Madsen, Brigham D. (Moscow, Idaho : University of Idaho Press 1996.)

**Subject:** Bannock Indians--History. Bannock Indians. Geschichte--1700-1900 and others

**Series:** Idaho yesterdays (Moscow, Idaho)

**Edition:** Pbk. ed.

**Language:** English

**ISBN:** 0893011894 and others

**Record number:**  
(OCoLC) 35601489

**Update Date:** 08/09/2018

**MMS ID:**  
991069731610302901

Physical

Electronic

Digital

Held by (1)

Other details

## Side by side comparison of records

< Record View

The Bannock of Idaho / Brigham D. Ma

<b>MMS ID</b>	991069732017202901
<b>Brief level</b>	10
<b>Originating system</b>	OCLC

MARC **BIBFRAME**

<b>LDR</b>	01930cam 2200505 a 4500
<b>001</b>	991069732017202901
<b>005</b>	20180809123205.0
<b>008</b>	960921r19961958iduab b 001 0 eng d
<b>010</b>	__  a 96214885
<b>020</b>	__  a 0893011894
<b>020</b>	__  a 9780893011895
<b>035</b>	__  a (OCoLC)35601489
<b>035</b>	__  a (OCoLC)ocm35601489

< Record View

The Bannock of Idaho / Brigham D. Ma

<b>MMS ID</b>	991069731610302901
<b>Brief level</b>	10
<b>Originating system</b>	01CAL_NETWORK

MARC **BIBFRAME**

<b>LDR</b>	01755cam 2200445 a 4500
<b>001</b>	991069731610302901
<b>005</b>	20180809123306.0
<b>008</b>	960921r19961958iduab b 001 0 eng d
<b>010</b>	__  a 96214885
<b>020</b>	__  a 0893011894
<b>020</b>	__  a 9780893011895
<b>035</b>	__  a (OCoLC)35601489
<b>035</b>	__  a (OCoLC)ocm35601489

Report these duplicates to: 1. Network Zone Problem Reporting (bib records)

# Helpful resources

## Slack and ULMS email list signup

Slack is a messaging platform used by CSU libraries. The focus is primarily on Alma and Primo with channels for acquisitions, electronic resources, systems, technical services and others.

Any CSU library person can join.

<https://calstate.atlassian.net/wiki/spaces/ULMS/pages/187138064/Slack>

There is also a ULMS Technical Service email list and you can sign up here:

<https://calstate.atlassian.net/wiki/spaces/ULMST/pages/1179737/Listserv+Information>

## Alma/Primo resources

Exlibris documentation:

<https://knowledge.exlibrisgroup.com/>

You can also do a Google search for Alma/Primo info.

Search example: "alma import profiles"

CSU ULMS wiki:

<https://calstate.atlassian.net/wiki/spaces/ULMS/overview>

Alma/Primo email lists

(good place to check to see if your question has been answered already)

<https://exlibrisusers.org/listinfo/alma>

<https://exlibrisusers.org/listinfo/primo>

Eluna document repository (requires Eluna membership login)

<http://documents.el-una.org/>

## Alma Sandbox

Great place to test. May require some configuration to mimic your instance of Alma.

"What happens if I do this?"

Scenario:

Activate a CZ collection,  
enable portfolios in batch with the portfolio loader,  
delete portfolios and collection.

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/050Inventory/020Managing\\_Electronic\\_Resources#Adding.2C\\_Updating.2C\\_or\\_Removing\\_Portfolio\\_Information\\_in\\_Bulk\\_Using\\_an\\_Excel\\_File](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources#Adding.2C_Updating.2C_or_Removing_Portfolio_Information_in_Bulk_Using_an_Excel_File)

Need the Sandbox URL's and logins? Ask on Slack or email the TS list.

## When asking for help

Please be specific and provide examples.

Screenshots help others see what you see.

It helps to have MMS IDs or OCLC numbers to reference and if you see something in Primo, provide the permalink.

It also helps if you describe what you've already tried and where (Exlibris Knowledge Center, ULMS wiki) you've already looked for info.

Background info and the use case/scenario are helpful too.

Best practices for Salesforce also apply when you're communicating with CSU libraries. <https://calstate.atlassian.net/wiki/spaces/ULMS/pages/390594561/Best+Practices+for+SalesForce>

# Alma monthly release testing group

Schedule of Alma monthly releases

[https://knowledge.exlibrisgroup.com/Alma/Release\\_Notes/010\\_2018](https://knowledge.exlibrisgroup.com/Alma/Release_Notes/010_2018)

Google drive for monthly release group

<https://drive.google.com/drive/u/0/folders/1nRJU7voZRBXfKe8aqhQiojXoB2unSI36>

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# Normalization rules (basic and intermediate) and Configuring Normalization Processes (Israel Yanez)

2:30pm-3:45pm

## Presentation outline

- What are Alma normalization rules & processes?
- Rule language & syntax
- How to create & test a normalization rule
- How to configure a normalization process
- Where & how normalization processes can be executed
- Live demo