



PRIMO SANDBOX: EXPORT/IMPORT AND PUBLISHING

CALIFORNIA STATE UNIVERSITY, FEBRUARY 9, 2017

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Agenda



- **Export/Import**
 - Process
 - Align environments
- **Publishing to sandbox**
 - During implementation project
 - After go live/switch to support
- **Q&A**

Export/Import

Export → Import: SANDBOX → PRODUCTION

Sandbox = source environment

Production = target environment

- Export/import process **OVERWRITES** target environment!
- Small changes made to both environments
- Large changes requiring testing and review made on sandbox and import/export used to copy configuration to production
- There should never be a change just made on production without also being made on sandbox to avoid it being overwritten in a future export/import

Export/Import

Export tool (run on sandbox):

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Back_Office_Guide/080Primo_Tools/The_Export_Primo_Configuration_Tool

Import tool (run on production):

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Back_Office_Guide/080Primo_Tools/The_Import_Primo_Configuration_Tool

- Export/import can be run at installation level or institution level.
- Export/import can include entire configuration or just normalization rules (or just individual normalization rule set)

Export/Import – Align Environments

Before establishing sandbox as source and production as target, the environments need to be aligned to ensure any changes that have been made by CalState or ExL on either environment since November are not lost.

Plan:

ExL does full configuration export at the installation level from production to sandbox. We'll give you a week (or other agreed upon timeframe) to update production with any changes you've made on sandbox that you want to retain. This will be the last time production will be used as the source.

Export/Import – Align Environments

Once the environments are aligned, the sandbox will be your source environment and the guidelines from the first slide will apply to both CalState and ExL work through the remainder of the project:

- Reminder: export/import OVERWRITES target environment!
- Small changes made to both environments
- Large changes requiring testing and review made on sandbox and import/export used to copy changes to production

Primo Sandbox – Publishing from Alma (Partial)

To add records to the Primo sandbox:

- 1) Coordinate with ExL to run publishing to Primo production to clear queue of existing records
- 2) In Alma IZ, create sets of records and run “Mark records to be republished by NZ job”
- 3) Repeat as needed in other Alma IZs
- 4) In Alma NZ, update publishing profile to point to sandbox and run network zone publishing
- 5) Once complete, change the publishing profile back to production

Valid during implementation project only!

Primo sandbox cannot exceed 500,000 records!

Primo Sandbox – Publishing from Alma (Full)

To refresh entire Primo sandbox:

- 1) In Primo, run 01CALIS_ALMA_DELETE pipe, Dedup_Frbr pipe, and Indexing_and_Hotswapping
- 2) Wait for physical_delete_records pipe to complete
- 3) Search CALS scope in FE for *01CALIS_ALMA to confirm records have been deleted (you may see stray records – this is okay)
- 4) Coordinate with ExL to run publishing to Primo production to clear queue of existing records
- 5) In each Alma IZ, create sets of ~20,000 records by date (see next slide) and run “Mark records to be republished by NZ job”
- 6) In Alma NZ, update publishing profile to point to sandbox and run network zone publishing
- 7) Once complete, change the publishing profile back to production

Valid during implementation project only!

Primo sandbox cannot exceed 500,000 records!

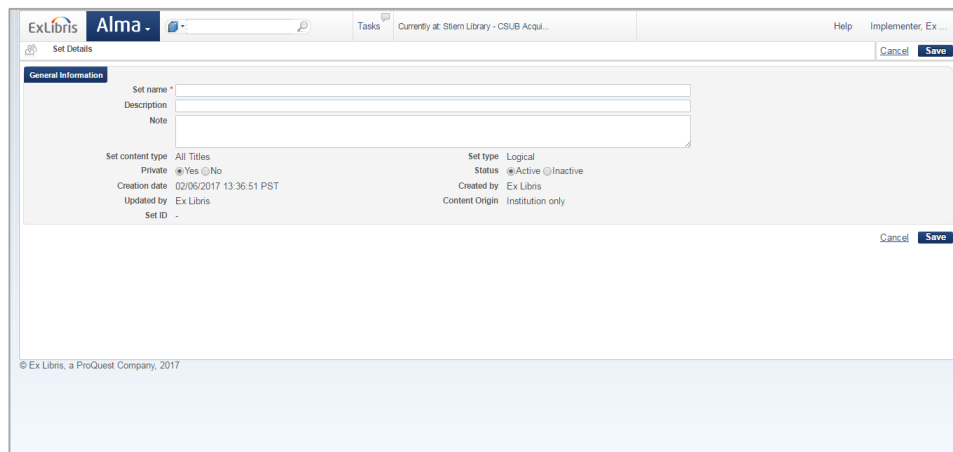
Publishing from Alma – Create ~20,000 record sets

Create a set from each institution zone of ~20,000 records using the following query, adjusting the date as needed to get as close to 20,000 as possible:



The screenshot shows the Alma query builder interface. At the top, there is a search bar with the text "Find All titles" and a dropdown arrow. Below this is a button labeled "Add conditions". Underneath, the text "All titles" is displayed. The main area contains three search conditions, each with a "Find" button and a "And" dropdown menu. The first condition is "Publication Year" with a value of "2005". The second condition is "Has inventory" with a value of "Yes". The third condition is "Is linked" with a value of "No". At the bottom left, there is a button labeled "Clear conditions".

Save the query and assign it a set name:



The screenshot shows the Alma Set Details form. The form is titled "Set Details" and has a "Cancel" and "Save" button at the top right. The form is divided into two sections: "General Information" and "Set Information". The "General Information" section contains fields for "Set name", "Description", and "Note". The "Set Information" section contains fields for "Set content type" (All Titles), "Private" (Yes/No), "Creation date" (02/06/2017 13:36:51 PST), "Updated by" (Ex Libris), "Set ID" (-), "Set type" (Logical), "Status" (Active/Inactive), "Created by" (Ex Libris), and "Content Origin" (Institution only). At the bottom right, there are "Cancel" and "Save" buttons. At the bottom left, there is a copyright notice: "© Ex Libris, a ProQuest Company, 2017".

Publishing from Alma – Publish set to NZ

Institution Zone > Administration > Manage Jobs and Sets > Run a Job > Mark records to be republished by NZ job

ExLibris Alma

Tasks Currently at: Stiem Library - CSUB Acqui... Help Implementer, Ex ...

Run a Job - Select Job to Run 1 2 3 4 5 Cancel Next

Job List

Type Publishing Source type All Find: in: Description Go

1 - 4 of 4 Task Chains Columns Tools

	Name	Description	Content Type	Type
1	Mark records to be republished by NZ job (Impl)	Mark records to be republished by NZ job (Implementation)	Publishing bulk	Publishing
2	Mark records to be republished by NZ job	Mark records to be republished by NZ job	Publishing bulk	Publishing
3	Holding OCLC Republish Set of Titles	Holding OCLC Republish Set of Titles	Publishing bulk	Publishing
4	Bib OCLC Republish Set of Titles	Bib OCLC Republish Set of Titles	Publishing bulk	Publishing

Cancel Next

Select your set and proceed through the screens to the Submit button.

Publishing from Alma – Update NZ publishing profile

Network Zone > Resource Management > Resource Configuration > Configuration Menu > Publishing Profiles > Publish bibliographic records from Network Zone to Primo > Choose “Primo Sandbox” from FTP Configuration menu

ExLibris Alma

Tasks Currently at: None Help Implementer, Ex ...

Publishing Profile Details Cancel Save

Profile Details

Profile name * Publish bibliographic records from Network Zone to Primo

Profile description Publish bibliographic record from Network Zone to Primo

Status Active Inactive

Scheduling Not scheduled Email Notifications

Submission Format

FTP configuration Primo Production Sub-directory

Content Options

Related records information enrichment

Headings enrichment

Physical Inventory Enrichment

Quick Add

Holding Tag Holding Subfield Bib Tag Bib Subfield

Add

No records were found.

Full Option

Publishing from Alma – After Implementation

Reminder: the previous steps are valid during implementation project only!

After CalState is live and incremental publishing has been turned on to run daily, the publishing profile cannot be changed to sandbox as it causes a conflict in the Alma database (the connection will be deleted to prevent this).

Instead, you can submit a case to request the sandbox be refreshed at set times during the year. More information on managing the sandbox after go live/switch to support will be provided later in the project.



Questions?



THANK YOU

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