Primo VE: External Resources Overview

1. Primo VE External Resources Overview

1.1 External Resources: Overview

Notes:
Hello, and welcome to this Primo VE session Loading External Resources: Overview
1.2 Agenda

Notes:

In today’s session, we’ll start by defining the differences between internal and external resources in Primo VE and Alma. We will see which data formats are currently supported. Then we will cover the concepts involved in loading and viewing external data, followed by a short session review.

1.3 Internal vs External Resources
Notes:

Internal vs External Resources

1.4 Internal vs External Records

Before we delve into loading external data in Primo VE, we must understand what external records are, and how they differ from the internal records in Alma.

Internal records are the records that are loaded into Alma during the data migration during implementation, and any other records that are cataloged or loaded into Alma as part of the cataloging process. Internal records can also be any records that are loaded into Alma via Alma Digital, or Alma-D. After these records are loaded into Alma, the records are stored, managed and maintained in Alma. These records go immediately into Primo, and they are indexed within 15 minutes after they are updated in Alma.

External records are from sources that are not currently loaded into Alma. For example, if you do not have Alma-D, you might still want your digital repositories to be discoverable in Primo VE. You can also include Libguides in this way. External records are loaded into Primo VE via the Discovery Import Profiles - we will see how this is done in the next training session. The original records are not managed or maintained in Alma - they are maintained in the source system - so this means periodically you may need to update the data in Alma with the records from your source system. The records themselves are not editable or visible in Alma after loading into Primo VE. When the records are loaded, they are mapped into DublinCore ++ for Alma to process, then Primo VE indexes and displays the records in the user interface.
1.5 Data Formats Supported

Notes:

Data Formats Supported

1.6 Dublin Core

Notes:

Existing standard (55) Dublin Core fields mapped
Additional local fields included (50)

discovery.local01 - discovery.local50

Discovery resource type
discovery.resourceType
There are two data formats supported - the first is Dublin Core. The Dublin Core records are loaded and stored in Alma in a proprietary format, but the existing 55 or so fields in Dublin Core are already mapped to that format. We also included a way to map up to 50 non-standard fields into local fields - we use the designation discovery.local01, discovery.local02, and so on. Please note that if you have non-standard fields in your Dublin Core data, they will get disregarded if they are not manually mapped to these local fields.

And we’ve also included a way to map your resources types to the resource types that exist in Primo. There is a field, dc:type, that you can use to indicate resource type, and in some circumstances this may map directly to its equivalent type in Primo. But the dc:type field might also contain resource types that are more specific to the ones that will display in Primo; for example the dc:type field may indicate the material is a Poster, but the resource type in Primo would be Image. For this reason, it is possible to retain the information in the dc:type while still mapping a different value to the discovery.resourceType field if needed.

1.7 XML

- Able to load XML records
- Requires mapping XML fields to Dublin Core fields
- May require mapping XML fields to local discovery fields
- Requires identifying tags that indicate beginning/ending of records

Notes:

It is also possible to load XML records into Primo VE, though it means a bit more work to configure.

To load records in XML, you will need to map the fields in the XML records to the standard Dublin Core fields as well as any local discovery fields that you want to include. You would also need to identify and define the tags that indicate the beginning and ending of each record.
1.8 Loading External Data

Notes:
Loading External Data

1.9 How External Data Gets Loaded

Notes:
Let’s take a look at the steps involved in loading external records into Primo VE. First we would need to define normalization rules. These rules determine how the source data gets mapped into the Dublin Core record. Most of these fields are already mapped by default, but there are a few that still need to be configured, such as the linking information, the resource type field, and any non-standard fields you might want to include. The next step is to test the normalization rules to ensure they will map the records correctly into Dublin Core. Once the normalization rules are in place, the normalization process task can be defined. The Normalization Process task groups the normalization rules together that you want to use for a particular data source. Then the Discovery Import Profile is configured. This import profile defines the information needed to load the data into Primo VE, such as the data source, method of file transfer, when to load the data, how often to load the data, and more. And finally, the Discovery Import Profile is run to load the data. We’ll take a closer look at each of these steps in the next training session.

### 1.10 Viewing External Data

**Agenda**

- Internal vs External Resources
- Data Formats Supported
- Loading External Data
- Viewing External Data
- Session Review and Quiz

**Notes:**

Viewing External Data
1.11 By Configuring Scopes in Search Profiles

Notes:

In order to see the data after it has been loaded, we need to ensure that the data is included in at least one scope.
Here in Edit Search Profiles screen, we can see the MyInstitution scope, which is already configured to contain all of the records that belong to your institution. Any external records that have been loaded would be included in this default scope.
By defining a custom scope, we can include external records by selecting the condition **Inventory: Available Digital or External data source.** **Available Digital** will include any available digital records, while the **External data source** option allows us to include or exclude specific collections within the digital records.
Available Digital and External data source (Slide Layer)

1.12 By MMS ID

- Records searchable by MMS ID in Primo
- Metadata of loaded record can be viewed by displaying source record
- Link to record in original source system

Notes:

The records are also searchable by MMS ID in Primo. The metadata of the loaded records can be viewed by display source record. We can also access the record via a link that leads us to the record in the original source system.
Link to record in source system (Slide Layer)

By MMS ID

- Records searchable by MMS ID in Primo
- Metadata of loaded record can be viewed by displaying source record
- Link to record in original source system

1.13 Session Review and Quiz

Agenda

- Internal vs External Resources
- Data Formats Supported
- Loading External Data
- Viewing External Data
- Session Review and Quiz

Notes:

Session Review and Quiz
1.14 Session Review

Session Review

In this session we covered:
- What internal and external resources are
- The concepts behind loading external data in Primo VE
- How external data can be viewed

Next Steps:
- Review the recommended articles
- Take the quiz
- Continue to the next training session

Notes:

In this session we covered what internal and external resources are, the concepts behind loading external data in Primo VE, and how that data can be viewed.

Please refer to the Recommended Articles section for additional information. After the brief quiz that begins on the next page, you can continue on to the next training session in this series.

1.15 Question 1

(Multiple Choice, 10 points, 1 attempt permitted)
Internal resources are loaded into Alma as part of the cataloging process, while external resources are loaded into Primo VE via the Discovery Import Profiles.

Internal resources are from data sources that are owned by the library, while external resources are from third parties.

Internal resources are indexed and displayed in Alma in about 15 minutes, while external resources must be indexed in an overnight process.

Both internal and external resources can be edited in Alma, but internal resources are created in Alma while external resources were originally imported into Alma.

Internal resources are only viewable by Alma staff users, while external resources are visible to patrons.

Feedback when correct:

Internal resources are cataloged and loaded into Alma as part of the cataloging process, while external resources are loaded into Primo VE via the Discovery Import Profiles.
This means that only internal resources are edited and maintained in Alma, while external resources are edited and maintained in the original source system, and loaded/reloaded into Primo VE as needed.

**Feedback when incorrect:**

Internal resources are cataloged and loaded into Alma as part of the cataloging process, while external resources are loaded into Primo VE via the Discovery Import Profiles.

This means that only internal resources are edited and maintained in Alma, while external resources are edited and maintained in the original source system, and loaded/reloaded into Primo VE as needed.

**Notes:**

**Correct (Slide Layer)**

![Quiz: External Resources Overview](image-url)
Incorrect (Slide Layer)

### 1.16 Question 2

*(True/False, 10 points, 1 attempt permitted)*

<table>
<thead>
<tr>
<th>Correct</th>
<th>Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>True</td>
</tr>
</tbody>
</table>
Feedback when correct:

In order to see the data in the Primo user interface after it has been loaded, we need to ensure that the data is included in at least one scope.

Feedback when incorrect:

In order to see the data in the Primo user interface after it has been loaded, we need to ensure that the data is included in at least one scope.

Notes:

Correct (Slide Layer)
1.17 Thank You!

Thank you for joining this session. We hope that you have found this information helpful to your understanding of Primo VE. For more information, please visit the Ex Libris Knowledge Center.

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1.18 About this Training

Notes:

1 (Slide Layer)

This presentation assumes that you have viewed these training sessions:

* Primo VE Overview