Internal Vs. External Data

- Determining what is internal vs. external sources is pretty straightforward in the video. Pretty much, if you have records in Alma, it’s internal. If you’re importing records directly, but not loading them into Alma, they are external. Alma content shows up pretty quickly after you load/activate, as does content from the external source that you will import via the Discovery Import Profile.

- The video doesn’t address the Primo Central Index and its content, which also is a source for Primo VE, and requires a publishing job that runs weekly—so those changes may take up to 8 days to show up in your search results.
Some examples of External Resources:
  o Repositories such as Dspace or Digital Commons
  o Libguides
  o Online collections such as NY Heritage

Primo can import data that is in Dublin Core or XML. Both are standard for resources that you’ll likely be importing.

The Dublin Core Mapping Table is a great tool to take the Dublin core tags and map them to the appropriate fields in Primo.

Loading External Data

Normalization Rules: Normalization rules are used extensively in Alma to manipulate data that is being imported into Alma, and Normalization Rules for Primo work the same way. Think of these as a way to add, edit, or remove information, fields, etc. from data that you’re importing. These are great in that you set them up once, and the rules are applied every time the data is imported again (either manually or automatically).

Normalization Process Task: as Alma and Primo are designed for small to highly complex large libraries, the configurations always take an approach of creating interchangeable parts, and then having a layer to allow for grouping and reusing of rules or configuration. Thus, the Normalization Process is just an extra layer where you can group normalization rules together. It’s great if you’re going to use a normalization rule (like adding data to an 856 field for example) in a variety of contexts in that you can just reuse the rule and not have to recreate it multiple times. But, the Normalization Process Task is required, even if you only have one normalization rule.

Discovery Import Profile: Much like the import profile in Alma, the discovery import profile allows you to define normalization process tasks, and also to define a variety of information about where the data is coming from, and what format it will be in. The Discovery Import Profile is extremely important as you’ll likely want to set up automatic harvesting or importing of data, rather than uploading manually.

Viewing External Data

To make the external data source available for including in Primo searches, you must add it to a scope, which can then be added to one or more search profiles and search profile slots.

You can add different filters to show only parts of the external data if you’d like.
  o Include Available Digital—allows viewing of digital content from external data source.
  o External Data Source
    ▪ Allows you to filter by different collections in the data source if you’d like.