



CONSORTIA – DISCOVERY

CALIFORNIA STATE UNIVERSITY, JANUARY 14, 2016

LYNN HIGGINS, MEGAN DRAKE | IMPLEMENTATION
CONSULTANTS


ExLibris
The bridge to knowledge

Agenda

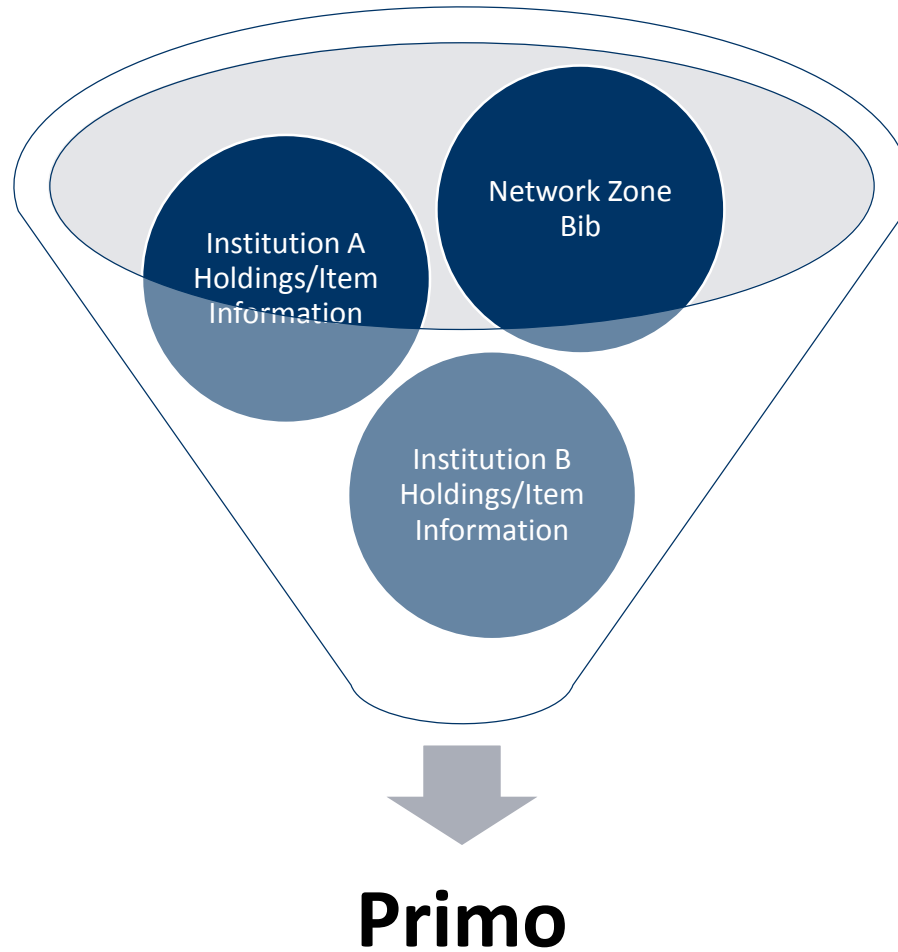


- **Discovery**
- **Centralized Publishing and Normalization Rules**
- **Policies to Consider**
- **Primo Central**
- **Questions**



Discovery


ExLibris
The bridge to knowledge



1



Video

The big Lebowski

Ethan Coen; Joel Coen; Jeff Bridges 1949-; John Goodman 1952-; Julianne Moore; Steve Buscemi 1958-; Peter Stormare; David Huddleston 1930-; Sam Elliott 1944-; Universal Pictures (Firm); PolyGram Filmed Entertainment (Firm); Working Title Films.; Universal Studios Home Video (Firm); Focus Features. 2005

● **Check holdings**

Get It [Details](#) [Browse similar items](#)

PU - Pacific University

[Sign-in for more options](#)

[Action](#)

Request Options: [Request from Summit](#)

Location Forest Grove Video Collection PN1997 .B541 2005

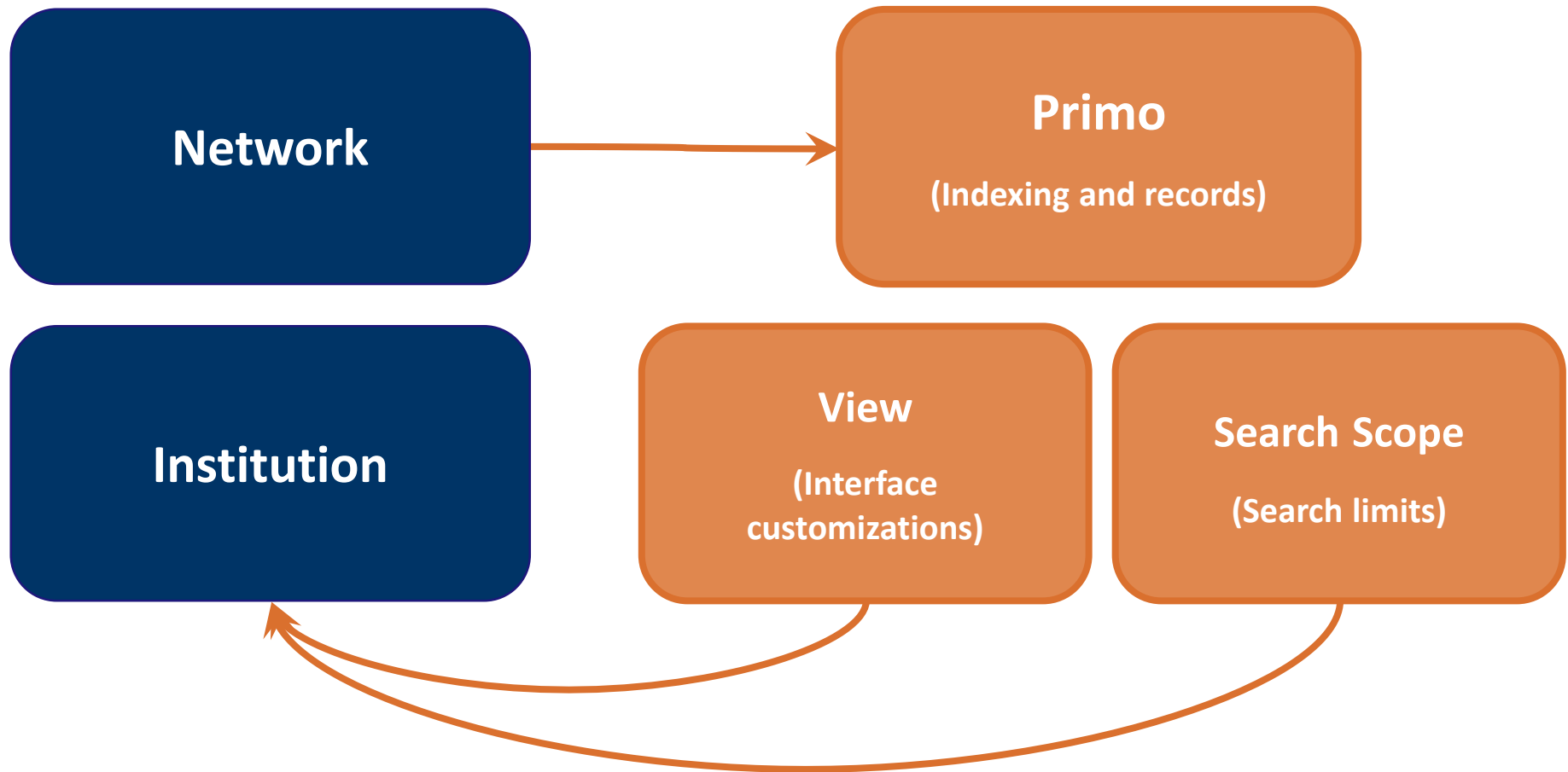
[Hide Details](#)

Availability: (1 copy, 0 available)

1 - 1 of 1 Records

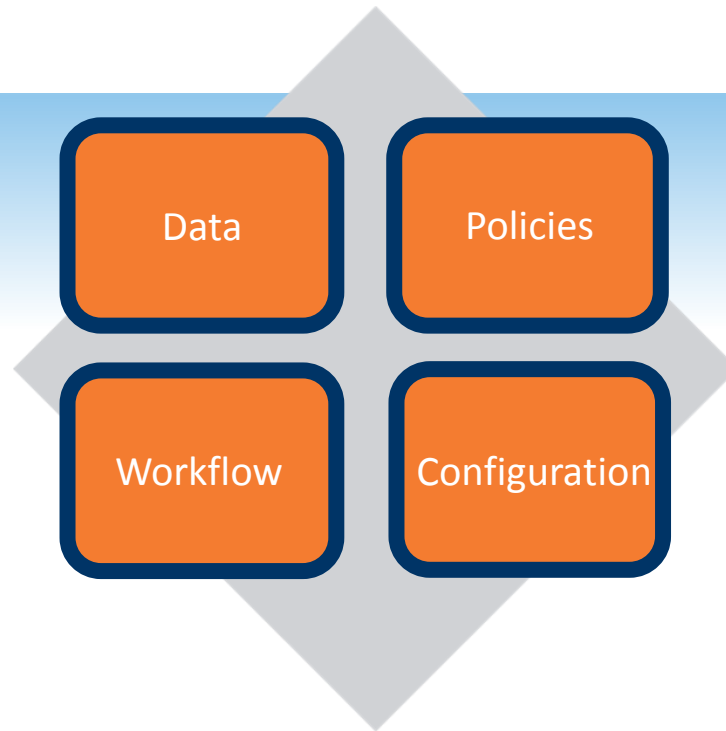
Barcode	Type	Policy	Description	Status
35369003654496	DVD	Loanable		On loan - since 04/23:59:00

Discovery



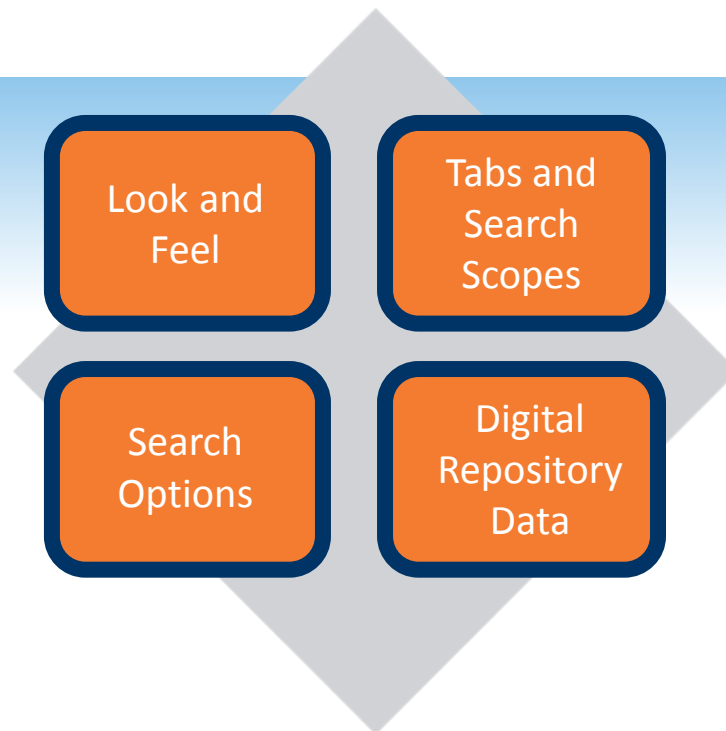
Discovery – Shared

- One searchable catalog of all members' holdings
- Centralized publishing and management of particular aspects of discovery configuration
- Agreement in supplying services
- Consistency in shared data & resource discovery and delivery



Discovery – Institutional

- Member management of look and feel of the Primo experience, including institutional branding
- Autonomy in managing particular aspects of discovery configuration
- Digital repository configuration at institution level





Centralized Publishing and Normalization Rules

Centralized Publishing and Normalization Rules

- Primo: shared Alma data source and normalization rules
- Alma: single publishing job
- Primo: single pipe at installation level
- Network zone related changes to default Alma normalization rule template
- Use of \$\$I<institution> parameter in PNX fields to indicate member institution



Policies to Consider

Policies to Consider – Shared Data

- Centralized Publishing from Network Zone bib
 - Alma – one pipe & one data source into Primo
- Centrally managed records in Primo Central Index
- Central ingest of digital repositories

Policies to Consider – Shared Standards

- Primo Normalization rules
- Agreement between institutions regarding a set of potential display fields, facets, scopes
- Look and feel – defining basic principles for display, services and designing centrally managed CSS

Policies to Consider – Shared Workflows

- NZ publishing to Primo, PCI, Google Scholar
- Maintaining Primo normalization and configuration
- What is the mechanism for member input?
 - Example: Discovery group with representatives from member libraries solicit feedback for quarterly renormalization timeline

Policies to Consider – Shared Configuration

- NZ Publishing Profiles
- Normalization Rules
- Indexes
- CSS
- General Electronic Services
- Display Logic Rules



Primo Central

Primo Central – Central Office

- Central Office/Admin institution manages activation of resources shared by all consortium institutions
- Customer ID: ed8a05a1a1eadb055bf3c74a241003a6 provides access to Admin institution and each institution in consortium

The screenshot shows the ExLibris Primo Central interface. The main window is titled 'My Profile > Edit Client Resources'. The customer name is 'California State University (System)' and the enrollment date is '10/06/2015 08:44 PM'. A highlighted orange box contains the following text: 'Please select resources from the following list and click Done to activate them. This institution is set up as a Consortium Central Office. Select only resources available to all members of the consortium.'

Below the instruction box is a list of provider names for resource activation. The list includes:

- ABC-CLIO
- ACM Digital Library
- ARTstor, Inc.
- ASTM International
- Accessible Archives
- Adam Matthew Digital
- Airiti Library
- Alexander Street Press
- American Council of Learned Societies (ACLS)
- American Economic Association
- American Geosciences Institute
- American Institute of Physics
- American Mathematical Society
- American Psychological Association (APA)
- American Society for Microbiology
- American Society of Civil Engineers
- Annual Reviews
- Australian National Data Service (ANDS)
- BMJ Publishing Group
- BTJ
- Regall House, Inc.

Primo Central – Institution

- Institution inherits consortium activations completed under Admin institution
- Customer ID: **inst_bd9bbe8395de7bd525867386ce95bc6c** provides access to individual institution

The screenshot shows the ExLibris Primo Central interface. The top navigation bar includes 'Language: English', 'Overview', 'Contact Us', and 'Help'. The main content area is titled 'My Profile > Edit Client Resources'. The customer name is 'California State University (System)' and the enrollment date is '10/06/2015 08:44 PM'. A section titled 'Resource Collections Activation' contains a checkbox for 'Inherit Consortium Central Office resources' which is checked. A red box highlights the instruction: 'Please select resources from the following list and click Done to activate them.' Below this is a list of providers with checkboxes for selection. The list includes: ABC-CLIO, ACM Digital Library, ARTstor, Inc., ASTM International, Accessible Archives, Adam Matthew Digital, Airiti Library, Alexander Street Press, American Council of Learned Societies (ACLS), American Economic Association, American Geosciences Institute, American Institute of Physics, American Mathematical Society, American Psychological Association (APA), American Society for Microbiology, American Society of Civil Engineers, Annual Reviews, Australian National Data Service (ANDS), BMJ Publishing Group, and BTJ.

Primo Central – Categories

- ‘Not Restricted’ (institution level activation) – free for search and delivery
- ‘Restricted For Delivery’ (Admin/consortium activation as applicable) – patrons can discover the citation, but a subscription is required to deliver the full-text. Activations are inherited by each institution
- ‘Restricted For Search’ (institution level activation) – a subscription is required for both search and delivery. For a consortium, this category also includes collections which contain a mix of ‘Restricted For Delivery’ and ‘Restricted For Search’



Questions?



THANK YOU

lynn.higgins@exlibrisgroup.com
megan.drake@exlibrisgroup.com