

IGeLU (International Group of Ex Libris Users Annual Conference)

27 - 29 August, 2019, Singapore

***“Alma records have all been  
published successfully to Primo”  
– Believe It or Not?***

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Hong Kong Baptist University Library**

# Abstract





Daily processes of *Harvesting, Publishing, and Indexing* Records



1. Daily scheduled procedures are *not reliable*, there is **NO** guarantee that:
  - *all new/updated Alma records have successfully been published to Primo*
  - *all these records have been indexed successfully and been searchable in Primo.*

# Abstract

香港浸會大學  
HONG KONG BAPTIST UNIVERSITY

Alma and Primo Record Publishing Monitor

[Report](#) | [Schedule](#)

Alma and Primo Record Publishing Status

Start Date

End Date

Search Reset

Export

Alma update date	Title	HKBU	HKALL	HKBU Primo check date	HKALL Primo check date	HKBU Alma-Primo Lag (Days)	HKALL Alma-Primo Lag (Days)
2019-08-17 13:00:04	Primo testing record HKBU Saturday 20190817 1300	<a href="#">MMSID</a> <a href="#">Title</a>	<a href="#">MMSID</a> <a href="#">Title</a>			0	0
2019-08-16 13:00:03	Primo testing record HKBU Friday 20190816 1300	<a href="#">MMSID</a> <a href="#">Title</a>	<a href="#">MMSID</a> <a href="#">Title</a>	2019-08-16 23:00:03 <a href="#">More</a>	2019-08-16 23:00:04 <a href="#">More</a>	0.4	0.4

- In HKBU, we have recently developed a new full automatic computer program to *monitor and keep track the status of Alma-Primo publishing procedures.*

# Agenda

- A. Background: HKBU Library
- B. Analysis of Alma Publishing to Primo Problems
- C. Alma and Primo Record Publishing Monitor Program
- D. Publishing Problems – A Case Study
- E. Conclusion



## A. Background: HKBU Library

# 1. Hong Kong Baptist University (HKBU)



香港浸會大學  
HONG KONG BAPTIST UNIVERSITY

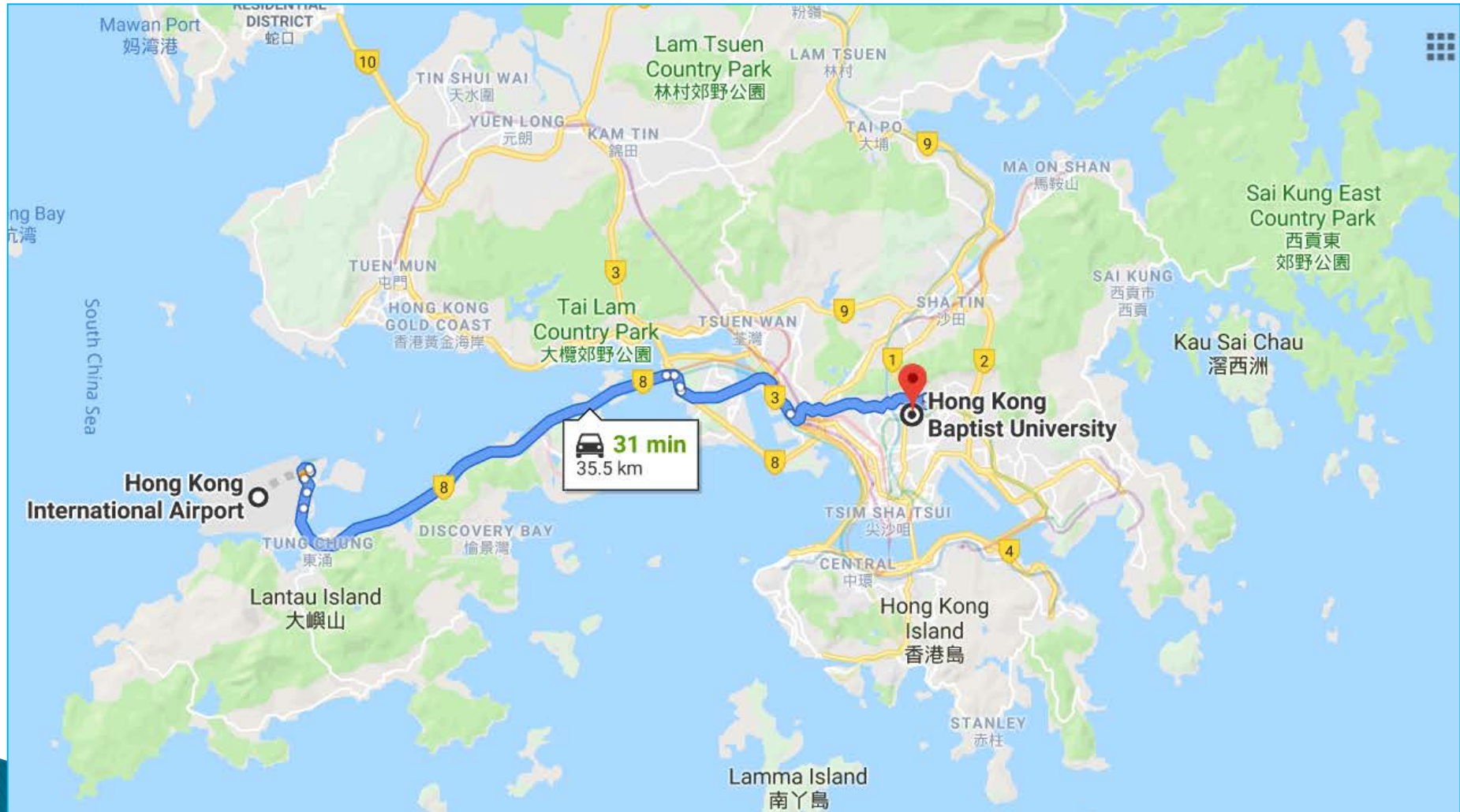
- was founded in 1956.
- is a publicly funded tertiary liberal arts institution with a Christian education heritage.

## 2. HKBU Faculties and Schools

➤ now offers bachelor, master and doctoral degrees from:

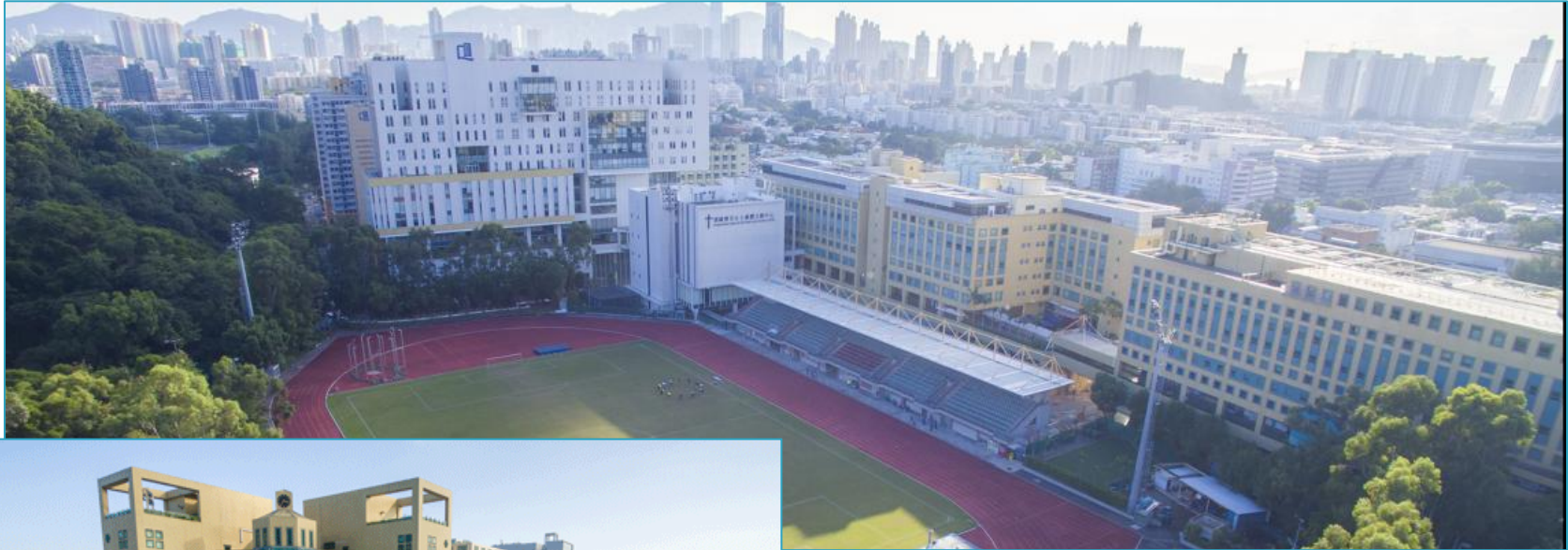
- ❑ Faculty of Arts
- ❑ Faculty of Science
- ❑ Faculty of Social Science
- ❑ School of Business
- ❑ School of Chinese Medicine
- ❑ School of Communications
- ❑ School of Continuing Education

# 3. Google Map





# 4. Campus Photos



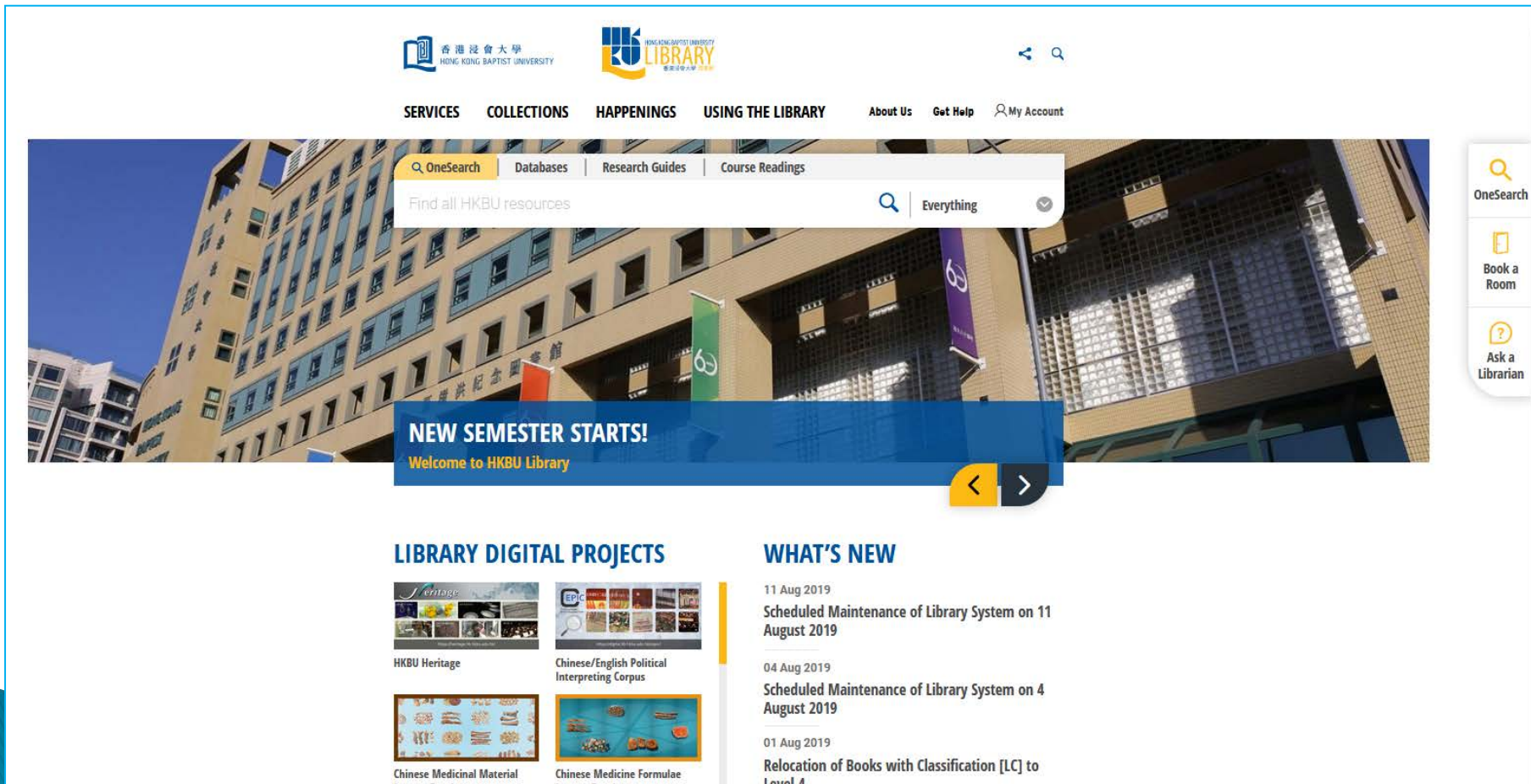
## 5. HKBU Library

- is made by a **Main Library**, and two branch libraries
  - ◆ Chinese Medicine Library
  - ◆ Shek Mun Campus Library



# 6. HKBU Library Website

➤ <https://library.hkbu.edu.hk/>



The screenshot displays the HKBU Library website interface. At the top, the HKBU logo and name are visible in both Chinese and English. Below this, a navigation bar includes links for SERVICES, COLLECTIONS, HAPPENINGS, USING THE LIBRARY, About Us, Get Help, and My Account. A prominent search bar features the 'OneSearch' button and a search input field with the placeholder text 'Find all HKBU resources'. To the right of the search bar, there are links for 'Everything' and a search icon. The main banner area shows a photograph of the library building with a blue overlay containing the text 'NEW SEMESTER STARTS! Welcome to HKBU Library'. Below the banner, the 'LIBRARY DIGITAL PROJECTS' section highlights four projects: HKBU Heritage, Chinese/English Political Interpreting Corpus, Chinese Medicinal Material, and Chinese Medicine Formulae. The 'WHAT'S NEW' section lists recent updates, including scheduled maintenance of the library system on 11 August 2019 and 4 August 2019, and the relocation of books with Classification [LC] to Level 4 on 01 August 2019. On the right side of the page, a vertical sidebar contains quick links for OneSearch, Book a Room, and Ask a Librarian.

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HONG KONG BAPTIST UNIVERSITY  
LIBRARY  
香港浸會大學圖書館

SERVICES COLLECTIONS HAPPENINGS USING THE LIBRARY About Us Get Help My Account

OneSearch Databases Research Guides Course Readings

Find all HKBU resources Everything

NEW SEMESTER STARTS!  
Welcome to HKBU Library

LIBRARY DIGITAL PROJECTS

HKBU Heritage

Chinese/English Political Interpreting Corpus

Chinese Medicinal Material

Chinese Medicine Formulae

WHAT'S NEW

11 Aug 2019  
Scheduled Maintenance of Library System on 11 August 2019

04 Aug 2019  
Scheduled Maintenance of Library System on 4 August 2019

01 Aug 2019  
Relocation of Books with Classification [LC] to Level 4

OneSearch

Book a Room

Ask a Librarian



# 7. HKBU Library – Collection Statistics 2018

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Volume Count

**1,256,224**

Audiovisual Materials  
& Microforms (items)

**153,085**

Serials Count (titles)

**2,484**

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e-Books

**1,313,485**



e-Journals

**125,405**



e-Databases

**335**

## 8. HKBU Library – Photos





## 8a. HKBU Library – Photos



## **B. Analysis of Alma Publishing to Primo Processes**

# 1. Our Question?

***“Have all Alma records been published successfully to Primo?”***

- ▶ To answer this Question, we need to have an in-depth analysis of the workflow:

***Alma Records Publish to Primo***

## 2. Alma Records Publishing to Primo

- ▶ According to the Alma product documentation, this job indeed contains two major **separate** and **independent** processes running on Alma and Primo:

1. Alma Exports – sftp connection to Primo

2. Primo Indexing – harvesting and normalizing

- [https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/090Integrations\\_with\\_External\\_Systems/030Resource\\_Management/100Publishing\\_to\\_Primo\\_and\\_Primo\\_Centra](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems/030Resource_Management/100Publishing_to_Primo_and_Primo_Centra)

## 3a. Alma Exports – sftp connection to Primo

- “The Alma publishing process is run after the bibliographic, holdings, circulation data, and optional course reserves data has been populated in Alma”.
- “Alma exports the full set of records the first time and then exports the changed records daily”.



## 3b. Primo Indexing

- “After Alma exports the records, Primo harvests and normalizes the *exported records to be searched and viewed by end users via Primo’s Front End*”.

## 4. Reports Checking

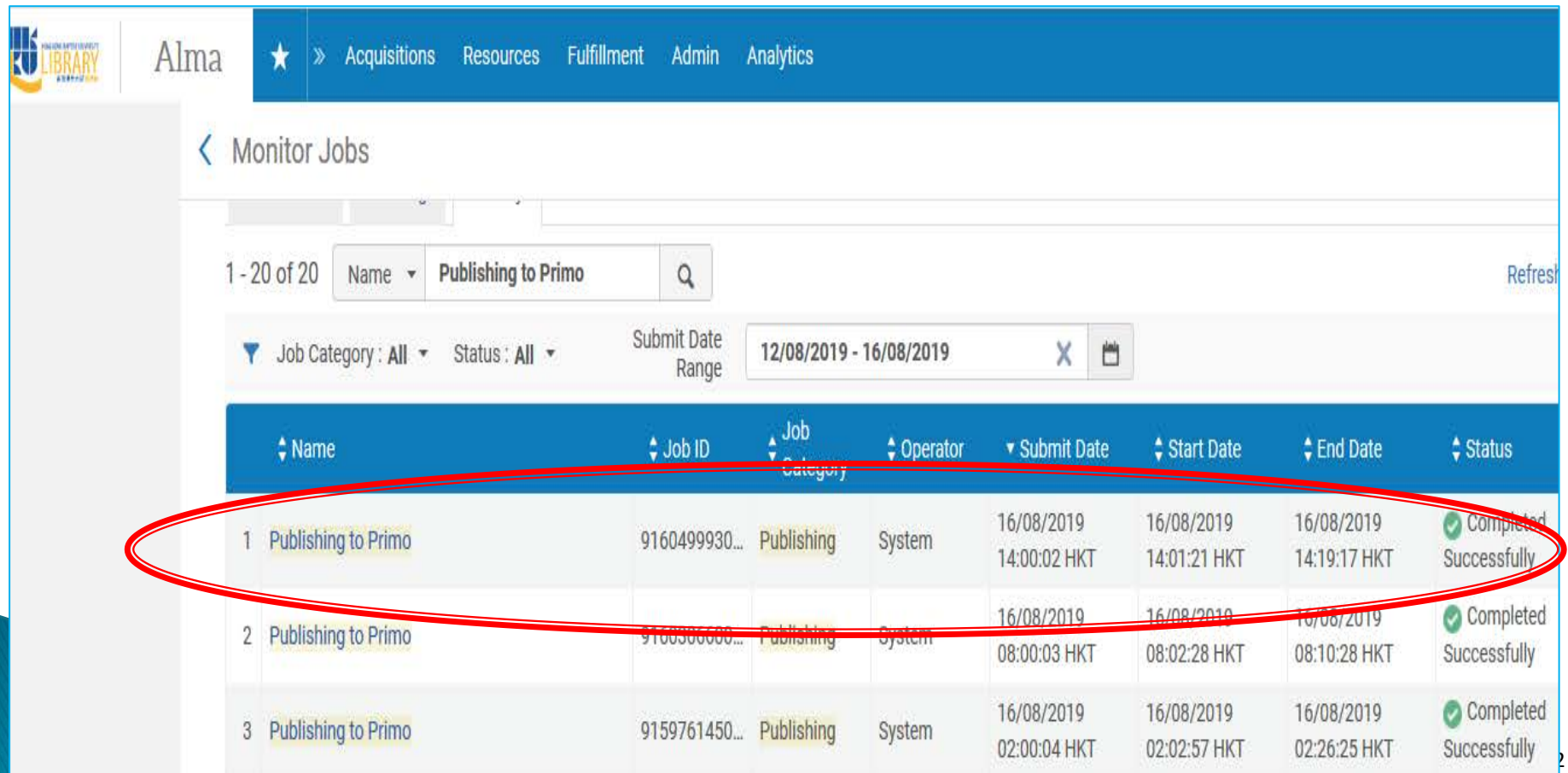
- In order to reply the Question of “Have all Alma records been published successfully to Primo?”, the most simple way is to check job status reports in Alma and Primo.
- the most simple way may **not** be
  - ❑ the most cost-effective and cost-efficient way
  - ❑ reliable way

## 5. Reports Checking -- IZ

- First of all, we would say the work of Alma job status report checking is neither cost-effective nor cost-efficiency, because this kind of checking must be *done in manually*.
- After the completion of above two jobs every day, we have to go to check the status of job reports in BU Alma and Primo *(IZ)* respectively.

# 5a. IZ Checking -- Alma

## ► Alma > Monitor Jobs > Publishing to Primo



The screenshot shows the Alma Monitor Jobs interface. The top navigation bar includes the Alma logo and links to Acquisitions, Resources, Fulfillment, Admin, and Analytics. The main heading is "Monitor Jobs". Below this, there are filters for "Name" (set to "Publishing to Primo"), "Job Category" (set to "All"), "Status" (set to "All"), and "Submit Date Range" (set to "12/08/2019 - 16/08/2019"). The table below lists the jobs, with the first three rows circled in red.

	Name	Job ID	Job Category	Operator	Submit Date	Start Date	End Date	Status
1	Publishing to Primo	9160499930...	Publishing	System	16/08/2019 14:00:02 HKT	16/08/2019 14:01:21 HKT	16/08/2019 14:19:17 HKT	Completed Successfully
2	Publishing to Primo	9160300000...	Publishing	System	16/08/2019 08:00:03 HKT	16/08/2019 08:02:28 HKT	16/08/2019 08:10:28 HKT	Completed Successfully
3	Publishing to Primo	9159761450...	Publishing	System	16/08/2019 02:00:04 HKT	16/08/2019 02:02:57 HKT	16/08/2019 02:26:25 HKT	Completed Successfully

# 5b. IZ Checking -- Primo Back Office

## ► *Primo > Monitor Primo Status > Pipe Monitoring*

**Environment 1 (Institutional Primo) - JULAC Production**

[Primo Home](#) > [Monitor Primo Status](#) > Pipe Monitoring

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#)

► **Job monitor**

History for HKBU\_IZ\_Regular

Owner:

Owner	Name	Stage	Status	Start Time	End Time
HKBU_ALMA	<a href="#">2019.08.16-15.00.00-1317985674</a>	completed successfully	completed	16/08/19 15:00:07	16/08/19 15:00:56
HKBU_ALMA	<a href="#">2019.08.16-09.00.00-1317845235</a>	completed successfully	completed	16/08/19 09:00:21	16/08/19 09:01:26
HKBU_ALMA	<a href="#">2019.08.16-03.00.00-1317780721</a>	completed successfully	completed	16/08/19 03:00:09	16/08/19 03:02:58

## 6. Reports Checking -- NZ


- HKBU Library is a member of the consortium, JULAC




- JULAC comprises eight government-funded Universities in HK
- “So Happy Together: Change for One, Change for Eight. The Hong Kong Shared Experience”, Peter E Sidorko (University Librarian of HKU)
- HKBU Library needs to contribute our Alma records to NZ Primo (JULAC HKALL). Thus, it is also required to check the job reports on NZ *Alma and Primo*

# 6a. NZ Checking -- Alma

**Alma** ★ » Acquisitions Resources Fulfillment Admin Analytics

Users ▾ All ▾ 

[<](#) Job Report

**Completed Successfully**

**Network Publishing Job**

<b>Process ID</b>	13196376940003406	<b>Started on</b>	16/08/2019 16:02:31 HKT
<b>Finished on</b>	16/08/2019 16:15:25 HKT	<b>Total run time</b>	12 Minutes 54 Seconds
<b>Status</b>	Completed Successfully	<b>Status date</b>	16/08/2019 16:15:25 HKT
<b>Records processed</b>	62642	<b>Records with exceptions</b>	0

Network Zone Report

	Resource Type	New	Updated	Deleted	Not published
1	Bibliographic Records Inventory	405	9231	3	31635

Member inventory records expanding Network Zone records

	Member	Resource Type	New	Updated	Deleted
1	City University of Hong Kong	Bibliographic Records Inventory	709	8409	0
2	Chinese University of Hong Kong	Bibliographic Records Inventory	841	8605	0
3	Education University of Hong Kong	Bibliographic Records Inventory	424	5030	0
4	Hong Kong Baptist University	Bibliographic Records Inventory	962	7843	0
5	Hong Kong Polytechnic University	Bibliographic Records Inventory	760	6387	0
6	The University of Hong Kong	Bibliographic Records Inventory	1027	9548	0
7	Hong Kong University of Science and Technology	Bibliographic Records Inventory	8971	25903	0
8	Lingnan University	Bibliographic Records Inventory	437	5871	0



# 6b. NZ Checking -- Primo

## Environment 2 (Standalone HKALL) - JULAC Production

[Primo Home](#) > [Monitor Primo Status](#) > Pipe Monitoring

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#)

> **Job monitor**

History for JULAC\_ALMA\_REGULAR

Owner:

Owner	Name	Stage	Status	Start Time	End Time
JULAC_NETWORK	<a href="#">2019.08.16-11.00.00-914417750</a>	completed successfully	completed	08/16/19 11:00:29	08/16/19 11:45:46
JULAC_NETWORK	<a href="#">2019.08.15-17.00.00-914195986</a>	completed successfully	completed	08/15/19 17:00:14	08/15/19 18:05:04
JULAC_NETWORK	<a href="#">2019.08.15-11.00.00-914130944</a>	completed successfully	completed	08/15/19 11:00:09	08/15/19 11:31:05
JULAC_NETWORK	<a href="#">2019.08.14-17.00.00-914083585</a>	harvesting-copy-files	completed	08/14/19 17:00:23	
JULAC_NETWORK	<a href="#">2019.08.14-11.00.00-913816457</a>	completed successfully	completed	08/14/19 11:00:18	08/14/19 12:02:49

# 7. Daily Manual Checking is Vital

- ▶ Manual Checking must be done **every day** to ensure the record synchronization between Alma and Primo, because:
  1. **EXL is not reliable** -- sometimes they do not aware that Alma Publishing process have not been completed.
  2. Thus, you have to do a manual checking yourself. In case, the Publishing on certain days have not been completed successfully, you have to report to SalesForces and ask them to re-run the Alma Publishing.

## 8. Manual Checking is not *Recommended*

- ▶ However, we do not recommend you to do report checking **every day**. Reasons are:
  1. Daily manual checking on two different systems are tedious, cumbersome and very time-consuming.
    - ◆ in HKBU situation, 4 reports checking -- IZ and NZ
  2. Report status are not very clear, sometimes even misleading (see discussions below).

## 8a. Manual Checking is not Recommended

- ▶ Most importantly, systems people, like us, do not like to do manual jobs.
- ▶ Even worse, this is not a one-time off labour work, rather a **daily routine work requiring manual labour**

## 9. Is Auto Checking Possible?

- ▶ Obviously, it can help *save time, money and efforts* if
  1. Checking work can be performed by a computer program automatically
  2. Generate an alert email notification to responsible staff when it is detected that the Alma Records Publishing to Primo work cannot be completed successfully

# C. Alma and Primo Record Publishing Monitor Program

# 1. Main Program Workflow Design

- **Program Algothrim**: *When can we say that a daily job of Alma records have successfully been published to Primo?*
- Subject to the results of a publishing job, that is, whether “**the exported records to be searched and viewed by end users via Primo’s Front End**”.



# 1a. Main Program Workflow Design

The Program contains two main Workflows:

1. **Alma:** Update a catalog record every day
2. **Primo:** Check whether the above updated catalog can be searched and found on Primo

# 1b. Main Program Workflow Design

- If this record can be ***found*** on Primo, the Alma Records Publishing to Primo Work on that day is proven to be completed successfully
- If records ***Not Found*** →
  - Indexing Work incomplete – more indexing time is required, do additional checking later
  - Work failure – harvesting or indexing pipe stuck  
→ Generate alert email notifications to System staff

## 2. Alma: Auto Update an record everyday

- ▶ In order to prove all Alma records (including new created/updated) have been published to Primo successfully every day, we have created 31 dummy records in Alma for daily checking.

## 2a. Alma: Auto Update an record everyday

The screenshot shows the Alma library system interface. The top navigation bar includes the Alma logo, a star icon, and links to Acquisitions, Resources, Fulfillment, and Admin. Below the navigation bar, there are tabs for 'All titles' and 'MMS ID'. The main content area displays a 'Record View' for the title 'Primo testing record HKBU Sunday 20190728 1300'. The record details are as follows:

Field	Value	Field	Value
MMS ID	991025951742303409	Suppress from pub	
Brief level	01	Record format	
Originating system	852JULAC_HKBU	Originating system	

Below the record details, there are two tabs: 'MARC' and 'BIBFRAME'. The 'MARC' tab is selected, and the MARC record is displayed in a table format. The 245 field is circled in red.

Field	Value
LDR	00225nam a2200085 u 4500
001	991025951742303409
005	20190728130003.0
008	171025-2019-xx10000 eng d
245	10  a Primo testing record HKBU Sunday 20190728 1300
500	a Day-28

## 2b. Alma: Auto Update an record everyday

- ▶ Each Alma record has an **unique title** which will be changed and updated by the program.
- ▶ These 31 records are updated on a basis of monthly rotation.
- ▶ Each Title contains a **unique** Day-Time stamp indicating when it is updated:
  - Primo testing record HKBU *[day of the week]*  
*[yyyymmdd] [hhmm]*



## 2c. Alma: Auto Update an record everyday

- ▶ An **Alma API script** is scheduled to edit the Title of a pre-defined Alma record every day
- ▶ For example, the table below illustrates the Titles of the Alma Records updated by this API on
  - **Days:** 1, 15, 28, 30, 31
  - **Month:** Feb, Jun, July (2019)

## 2d. Alma: Auto Update an record everyday

Alma MMSID	Day of Month	Feb 2019	Jun 2019	July 2019
991025951745003409	1	Primo testing record HKBU Friday 20190201 1300	Primo testing record HKBU Saturday 20190601 1300	Primo testing record HKBU Monday 20190701 1300
.....				
991025951743603409	15	Primo testing record HKBU Friday 20190215 1300	Primo testing record HKBU Saturday 20190615 1300	Primo testing record HKBU Monday 20190715 1300
.....				
991025951742303409	28	Primo testing record HKBU Thursday 20190228 1300	Primo testing record HKBU Friday 20190628 1300	Primo testing record HKBU Sunday 20190728 1300
.....				
991025951742103409	30	--	Primo testing record HKBU Sunday 20190630 1300	Primo testing record HKBU Tuesday 20190730 1300
991025951742003409	31	--	--	Primo testing record HKBU Wednesday 20190731 1300

### 3. Primo: Automatic Searching by Title

- ▶ Two Primo PNX API scripts are scheduled to perform an automatic checking against HKBU Primo and HKALL Primo respectively
- ▶ ***Title – Contains (exact phrase)*** searching the Alma record updated most recently

## 3a. Primo: Automatic Searching by Title

► For example:

1. Today's day = Friday 2019-08-23
2. Alma API script update a catalog record at 13:00, of which the **Title =**

Primo testing record HKBU *Friday 20190823 1300*

3. An Primo PNX API script is scheduled to check against HKBU Primo by **Title exact phrase searching**

## 3b. Primo: Automatic Searching by Title

▶ If this Title is ***found*** on HKBU Primo:



1. the script will log down the Alma-Primo Lag (Days) on Web Report, i.e. ***n days***

= Day-Time of a Alma record to be searched on Primo – Day-Time of this Alma record is updated on Alma



# 3c. Primo: Automatic Searching by Title

[http://lib-nt.hkbu.edu.hk/primo\\_record\\_check/home.asp#](http://lib-nt.hkbu.edu.hk/primo_record_check/home.asp#)



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Alma and Primo Record Publishing Monitor

[Report](#) | [Schedule](#)

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**Alma and Primo Record Publishing Status**

Start Date

End Date

Alma update date	Title	HKBU	HKALL	HKBU Primo check date	HKALL Primo check date	HKBU Alma-Primo Lag (Days)	HKALL Alma-Primo Lag (Days)
2019-08-24 13:00:03	Primo testing record HKBU Saturday 20190824 1300	<a href="#">MMSID</a> <a href="#">Title</a>	<a href="#">MMSID</a> <a href="#">Title</a>	2019-08-24 15:00:02	2019-08-24 15:00:03	0.1	0.1
2019-08-23 13:00:04	Primo testing record HKBU Friday 20190823 1300	<a href="#">MMSID</a> <a href="#">Title</a>	<a href="#">MMSID</a> <a href="#">Title</a>	2019-08-23 23:00:02 2019-08-23 15:00:03 <a href="#">Less</a>	2019-08-23 23:00:03 2019-08-23 15:00:03 <a href="#">Less</a>	0.4	0.4
2019-08-22 13:00:03	Primo testing record HKBU Thursday 20190822 1300	<a href="#">MMSID</a> <a href="#">Title</a>	<a href="#">MMSID</a> <a href="#">Title</a>	2019-08-22 23:00:03 <a href="#">More</a>	2019-08-22 23:00:03 <a href="#">More</a>	0.4	0.4
2019-08-21 13:00:03	Primo testing record HKBU Wednesday 20190821 1300	<a href="#">MMSID</a> <a href="#">Title</a>	<a href="#">MMSID</a> <a href="#">Title</a>	2019-08-21 23:00:03 <a href="#">More</a>	2019-08-21 23:00:03 <a href="#">More</a>	0.4	0.4

## 3d. Primo: Automatic Searching by Title

- ▶ If this Title is ***Not Found*** on HKBU Primo: the script
  1. is scheduled to continue the automatic Title checking until this record is found.
  2. will generate an alert email to responsible staff every day automatically if: Lag Days is **over 0.5**,
    - i.e. the Alma record is still unable to be found in HKBU Primo 0.5 days after it is updated

## 3e. Primo: Automatic Searching by Title

- ▶ Auto email notification: the Alma record is still unable to be found in HKALL Primo 2 days after it is edited.

From: libsys\_primo\_check@hkbu.edu.hk  
To: tungary@hkbu.edu.hk; talentlaw@hkbu.edu.hk; yoli@hkbu.edu.hk; leungwc@hkbu.edu.hk; chloelei@hkbu.edu.hk; ckwong@hkbu.edu.hk  
Cc:  
Subject: [Fail] HKBU/HKALL Primo - record(s) not found

Sent: 16/1/2018 (週二)

Alma update date	Title	HKBU Primo check date	HKBU Alma-Primo Lag (Days)	HKALL Primo check date	HKALL Alma-Primo Lag (Days)
2018-01-15 13:00:05	Primo testing record HKBU Monday 20180115 1300	2018-01-15 23:00:06	0.8 (Not found yet)	2018-01-15 23:00:06	0.8 (Not found yet)
2018-01-13 13:00:02	Primo testing record HKBU Saturday 20180113 1300	2018-01-14 15:00:03	1.1	2018-01-15 23:00:05	2.8 (Not found yet)
2018-01-12 13:00:03	Primo testing record HKBU Friday 20180112 1300	2018-01-13 15:00:03	1.1	2018-01-15 23:00:05	3.8 (Not found yet)
2018-01-11 13:00:03	Primo testing record HKBU Thursday 20180111 1300	2018-01-12 15:00:02	1.1	2018-01-15 23:00:05	4.8 (Not found yet)

Detail: [https://lib-nt.hkbu.edu.hk/primo\\_record\\_check/home.asp](https://lib-nt.hkbu.edu.hk/primo_record_check/home.asp)

# D. Publishing Problems

## -- A Case Study

# 1. Email Alert Notification

- ▶ On 5 Aug 2019, we received an Alert Email report that there were problems to search Alma records updated on 2-Aug and 3-Aug

From: libsys_primo_check@hkbu.edu.hk		Sent: 5/8/2019 (週一) 8:00			
To: tungary@hkbu.edu.hk; talentlaw@hkbu.edu.hk; yoli@hkbu.edu.hk; leungwc@hkbu.edu.hk; kenutong@hkbu.edu.hk; ckwong@hkbu.edu.hk					
Cc:					
Subject: [Fail] HKBU/HKALL Primo - record(s) not found					
Alma update date	Title	HKBU Primo check date	HKBU Alma-Primo Lag (Days)	HKALL Primo check date	HKALL Alma-Primo Lag (Days)
2019-08-03 13:00:04	Primo testing record HKBU Saturday 20190803 1300	2019-08-04 23:00:05	1.8 (Not found yet)	2019-08-03 23:00:03	0.4
2019-08-02 13:00:03	Primo testing record HKBU Friday 20190802 1300	2019-08-04 23:00:04	2.8 (Not found yet)	2019-08-03 23:00:02	1.4

Detail: [https://lib-nt.hkbu.edu.hk/primo\\_record\\_check/home.asp](https://lib-nt.hkbu.edu.hk/primo_record_check/home.asp)



## 2. Problems caused by a Primo Monthly New Release

- ▶ When we went to check our Alma-Primo Monitor Program, it was surprised to find that the Primo Indexing Problem should only be occurred on 2-Aug (Friday) and 3 Aug (Saturday), the indexing process was resumed back to normal on 4 Aug.

# 2a. Problems caused by a Primo Monthly New Release



## Alma and Primo Record Publishing Monitor

[Report](#) | [Schedule](#)

### Alma and Primo Record Publishing Status

Start Date

End Date

Alma update date	Title	HKBU	HKALL	HKBU Primo check date	HKALL Primo check date	HKBU Alma-Primo Lag (Days)	HKALL Alma-Primo Lag (Days)
2019-08-04 13:00:05	Primo testing record HKBU Sunday 20190804 1300	<a href="#">MMSID</a> <a href="#">Title</a>	<a href="#">MMSID</a> <a href="#">Title</a>	2019-08-04 23:00:05 <a href="#">More</a>	2019-08-04 23:00:06 <a href="#">More</a>	0.4	0.8 (Not found yet)
2019-08-03 13:00:04	Primo testing record HKBU Saturday 20190803 1300	<a href="#">MMSID</a> <a href="#">Title</a>	<a href="#">MMSID</a> <a href="#">Title</a>	2019-08-04 23:00:05 <a href="#">More</a>	2019-08-03 23:00:03 <a href="#">More</a>	1.8 (Not found yet)	0.4
2019-08-02 13:00:03	Primo testing record HKBU Friday 20190802 1300	<a href="#">MMSID</a> <a href="#">Title</a>	<a href="#">MMSID</a> <a href="#">Title</a>	2019-08-04 23:00:04 <a href="#">More</a>	2019-08-03 23:00:02 <a href="#">More</a>	2.8 (Not found yet)	1.4
2019-08-01 13:00:04	Primo testing record HKBU Thursday 20190801 1300	<a href="#">MMSID</a> <a href="#">Title</a>	<a href="#">MMSID</a> <a href="#">Title</a>	2019-08-01 23:00:03 <a href="#">More</a>	2019-08-02 23:00:03 <a href="#">More</a>	0.4	1.4

## 2b. Problems caused by a Primo Monthly New Release

- ▶ On *4 August (Sunday)*, EXL have sent us an email that our BU Primo has Hot swap and Indexing problem due to a New Release Update on Primo.

From: SystemStatus@exlibrisgroup.com [mailto:SystemStatus@exlibrisgroup.com]

Sent: Sunday, August 04, 2019 8:37 AM

To: SystemStatus@exlibrisgroup.com

Subject: New update for Primo APAC02

Dear customer,

Current status: Service Alert Information

04-Aug-2019 UTC 0:37:18

Due to technical issues, the Hotswap could not be completed today in your environment, and thus the new indexed data will not be available.

The issue is being handled by our engineers with high priority, in order to resume the normal daily index process.

|

Ex Libris Cloud

Regards,

Ex Libris Cloud Team

## 2b. Problems caused by a Primo Monthly New Release

- ▶ This Indexing problem have influenced the Alma records to be published to our BU institution Primo on 2 Aug and 3 Aug respectively, rather than on 4 Aug.

### 3. Primo Indexing Report – Not Reliable

- ▶ One more special finding is that Primo Indexing Report is NOT reliable
- ▶ Even the Primo Indexing Report indicated that the job status had completed, but the Alma records updated on 2-Aug and 3-Aug still could not be searched on Primo



# 3a. Primo Indexing Report – Not Reliable

## Environment 1 (Institutional Primo) - JULAC Production

[Primo Home](#) > [Monitor Primo Status](#) > Process Monitoring

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#)

> **Job monitor**

History for Ongoing Indexing

Owner:

Owner	Stage	Status	Records Succeeded	Start Time	End Time
JULAC - Production	Indexing	Running	183400	04/08/19 20:50:07	
JULAC - Production	Completed	Completed	1635	04/08/19 17:46:50	04/08/19 20:50:06
JULAC - Production	Completed	Completed	58	04/08/19 02:21:19	04/08/19 17:46:51
JULAC - Production	Completed	Completed	4068	02/08/19 11:54:37	04/08/19 02:21:19
JULAC - Production	Completed	Completed	113197	01/08/19 21:30:21	02/08/19 11:54:35
JULAC - Production	Completed	Completed	83801	01/08/19 16:27:56	01/08/19 21:30:19

## 4. EXL did not aware of the Problem

- ▶ As usual, EXL did not aware of the Problem.
- ▶ We have to report the Problem to SaleForce and ask them to re-run the Primo Indexing and Hot swap processes for Aug-2 and Aug-3 records

# E. Conclusion

# 1. Problem Statistics

- ▶ From 1 Jan 2018 to 15 Aug 2019, a total of 6 Record Publishing incidents are detected by our Monitor program.
  - 2018-01-05
  - 2018-02-01
  - 2018-03-09
  - 2018-12-24
  - 2019-05-15
  - 2019-08-04
- ▶ In average, 1 problem occurs per 3.3 months.

## 2. EXL reposnes

- ▶ In all incidents, EXL did not aware of the problem occurred.
- ▶ SalesForces would take actions only after we have detected the problem and reported to them



### 3. Our Answer to the Question

“Alma records have all been published successfully to Primo”

– *Believe It or Not?*

► *What an answer would you expect?*

***“Of course, NOT, unless you have a mechanism to ensure the Alma daily exported records can be searched and found on Primo”***

# The End

## Q & A