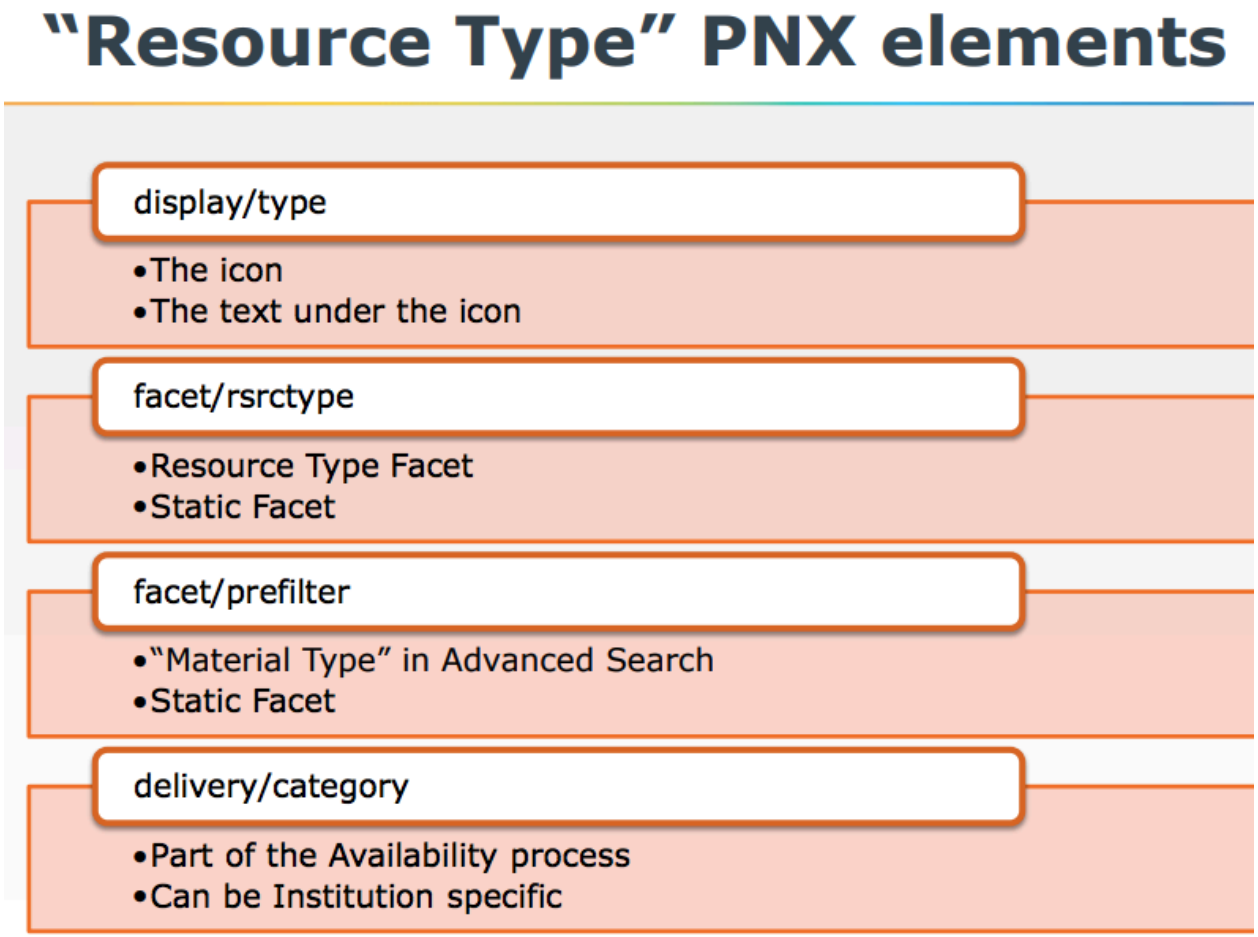
Primo facets/formats table with Marc encoding
https://docs.google.com/document/d/1_fL99cJxy_PZEJyjaiqhtqnEuaAySZSgMAJTNhO20CE/edit?usp=sharing

Primo back office, step-by-step instructions
https://docs.google.com/document/d/1NG0Kv4zOXN1QsreHArl_EG7q7Jf4Lgtb0lLlp-0Xxcc/edit?usp=sharing

Examples of facets/formats re-aligned (June 2018)
https://docs.google.com/document/d/1-Ko65YyBbNxuGGKIbnseeDJHi2JgbA_SfNUyXoeZoIA/edit?usp=sharing

zDocument on links to Exlibris documentation, written instructions
https://docs.google.com/document/d/1NsOqp4adrbfUgGAMzQ5ZMtbVLc2rsh_EOR3h7pxRaOs/edit?usp=sharing

Resource types in Primo
http://www.anzreg.org/meetings/webinars/2014_Eluna/Primo/Facets%20&%20Resource%20Types.pdf



Adding/revising Primo facets/formats

(Note: If you're only adding a facet, do steps 1,3,4,7, and 8. Example: media facet)

1. Norm rules, facets, resource type

Locate existing norm rule for LP's and disable it.

Rule group facets_rsrctype

Source	Type	Value	Enabled
	Constant	lps	☐

Conditions | Conditions logic: True | Conditions relation: And

Condition 1 - Logic: True

Condition 1 - Source	Type	Field	Ind1	Ind2	Subfield		Success If
	MARC	ldr			Include		Match Last

Condition1 - Routines | General Parameter:

Routine	Parameter
Check characters at position	6@@ij
Checks string at position	7@@m

10

Condition 2 - Logic: True

Condition 2 - Source	Type	Field	Ind1	Ind2	Subfield		Success If
	MARC	007			Include		Match Last

Condition2 - Routines | General Parameter:

Routine	Parameter
Checks string at position	0@@s
Checks string at position	1@@d
Check characters at position	3@@bcd

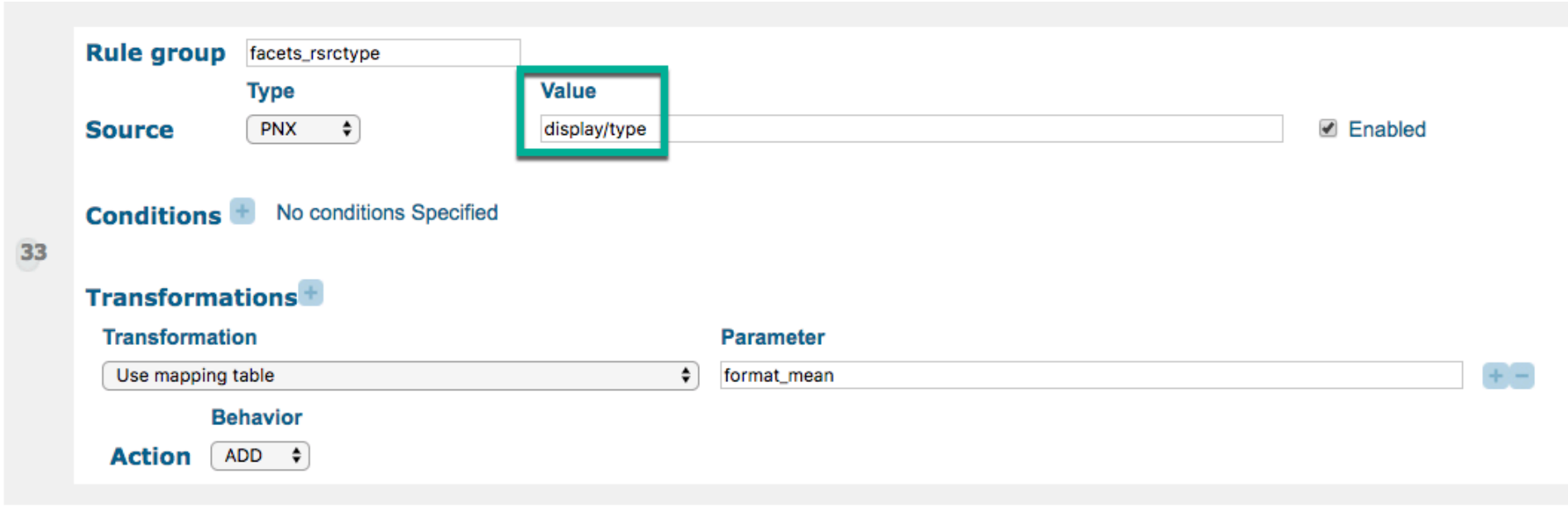
Transformations

Transformation	Parameter
Copy As Is	

Behavior

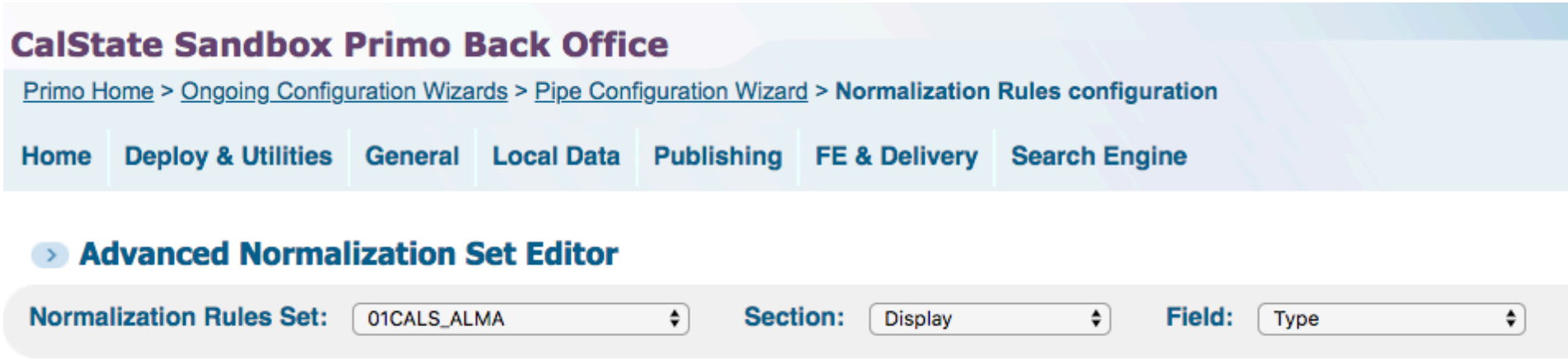
Action: ADD

so that the resource type facet will be determined by the norm rule for display type and the format_mean mapping table



2. Norm rules, display, type

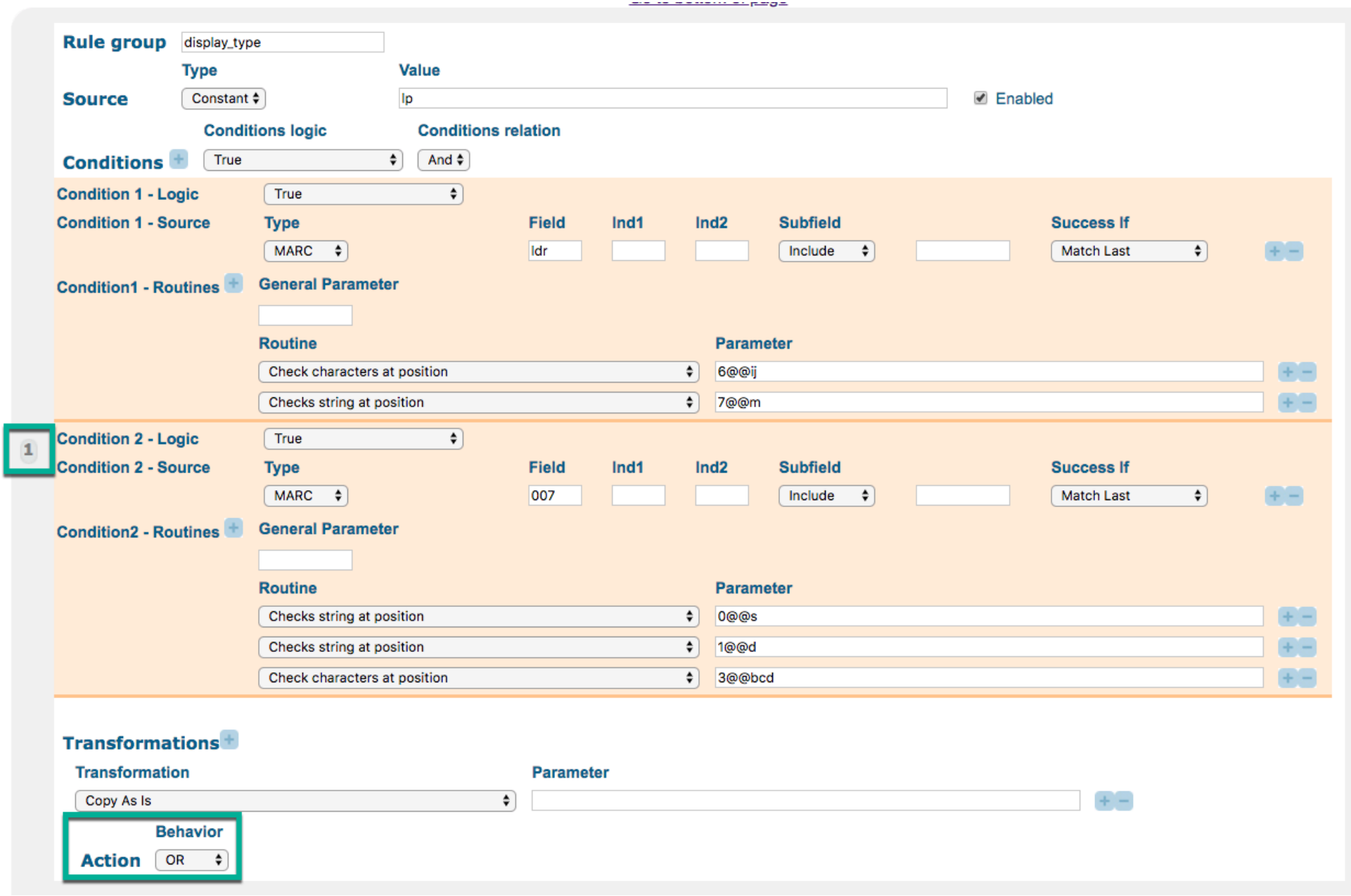
These normalization rules determine the icon and label for each resource in Primo.



Add a norm rule as the first norm rule.

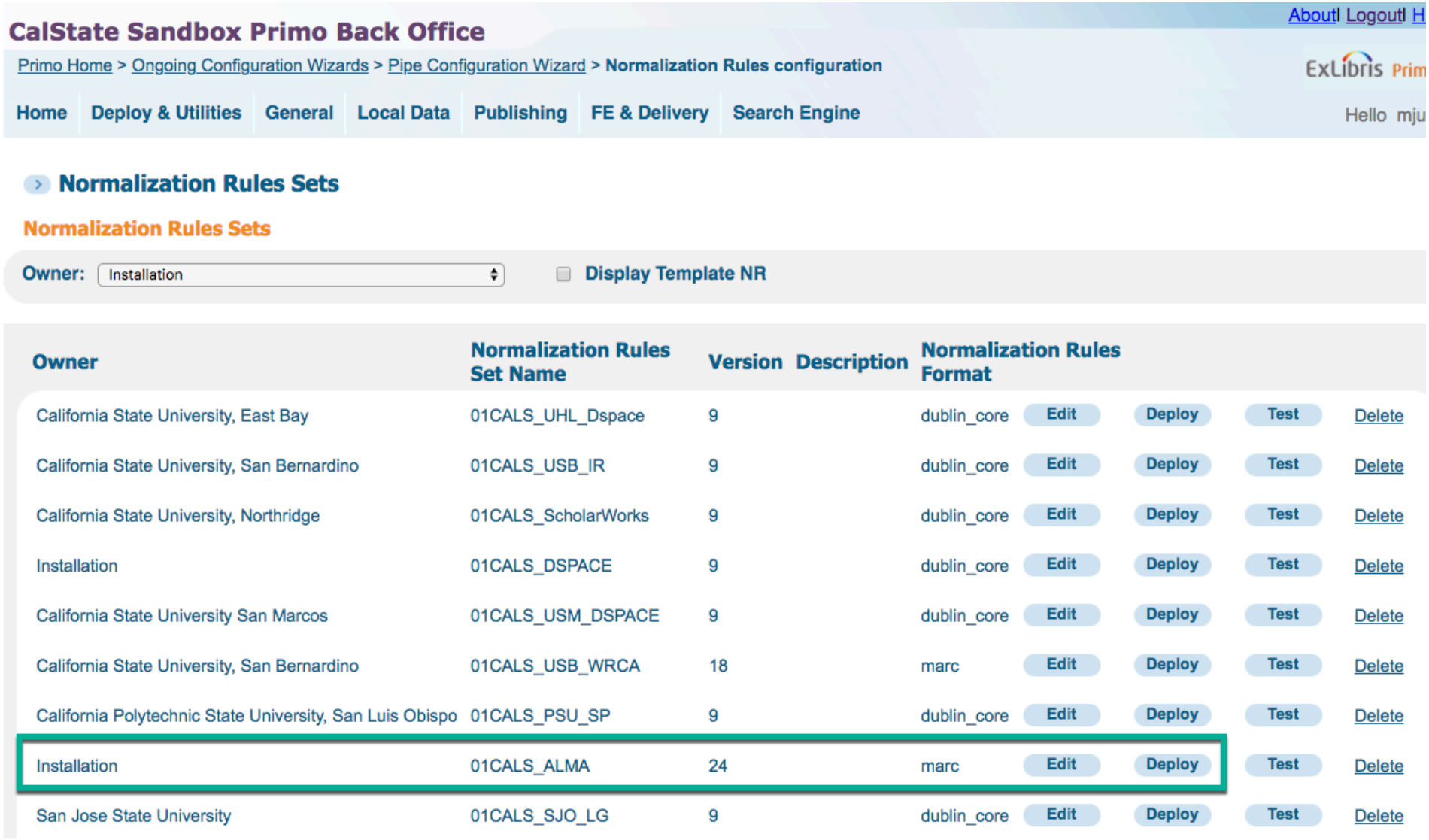
Copy the facet norm rule for LP's.

Constant value should be singular: lp



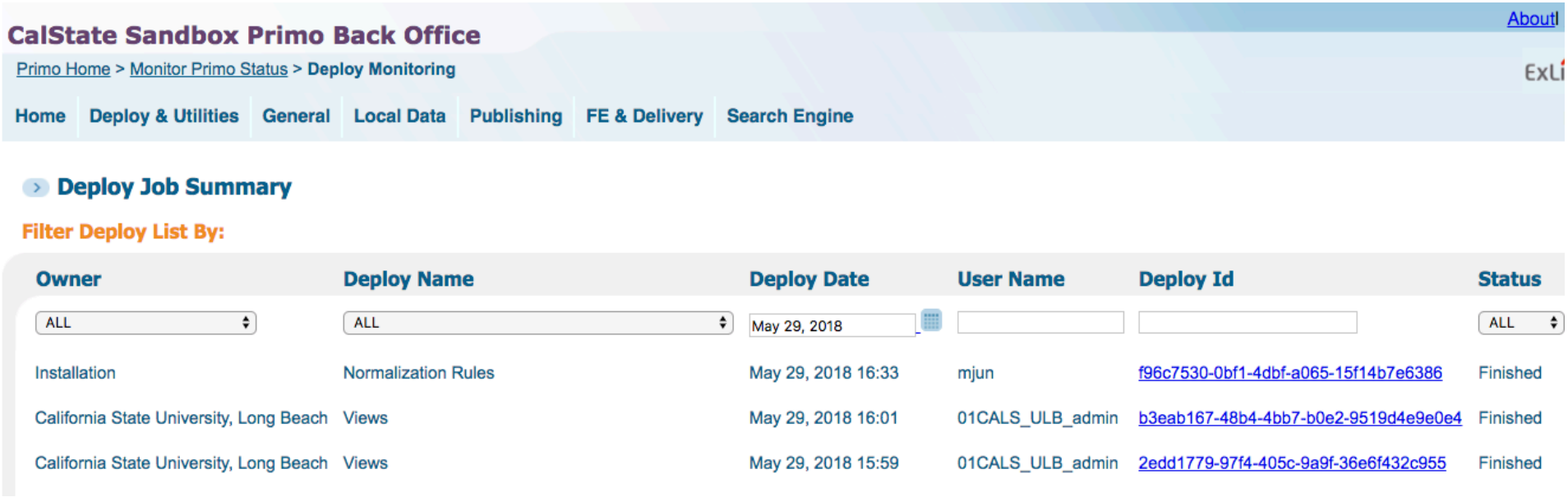
Action should be OR because a Primo record can only have 1 display type (aka Format, aka icon and label.)

3. Deploy norm rules

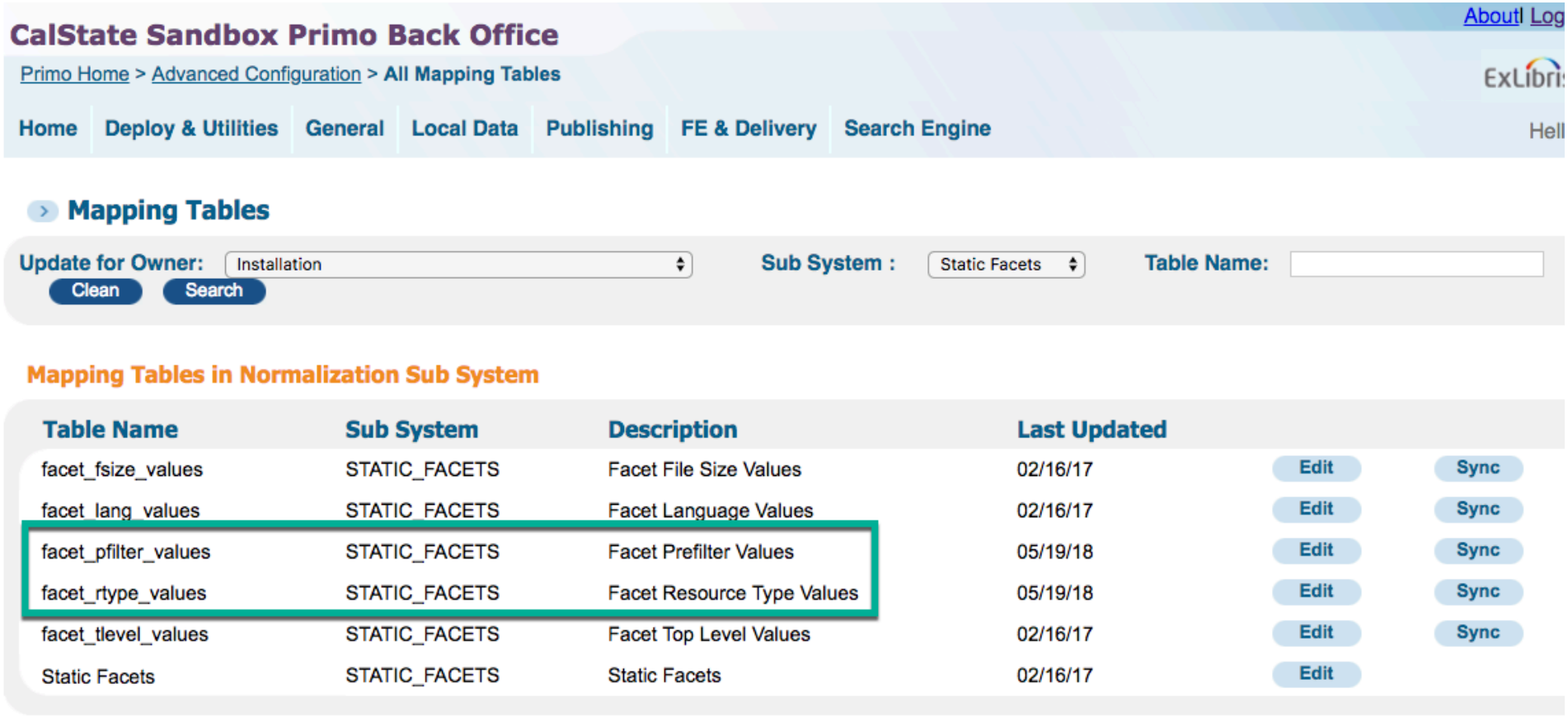


To check status of deploy

Monitor primo status, deploy monitoring



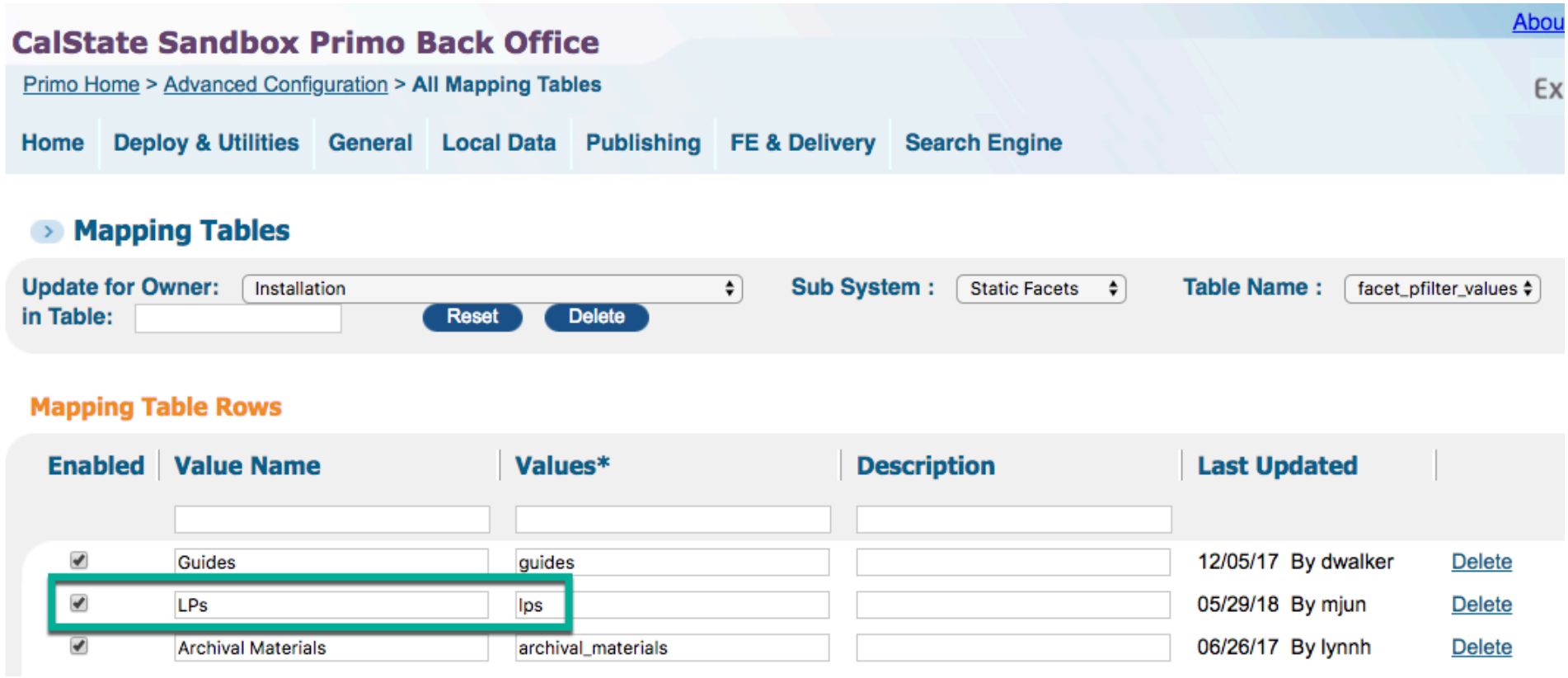
4. Mapping tables, static facets



facet_pfilter_values

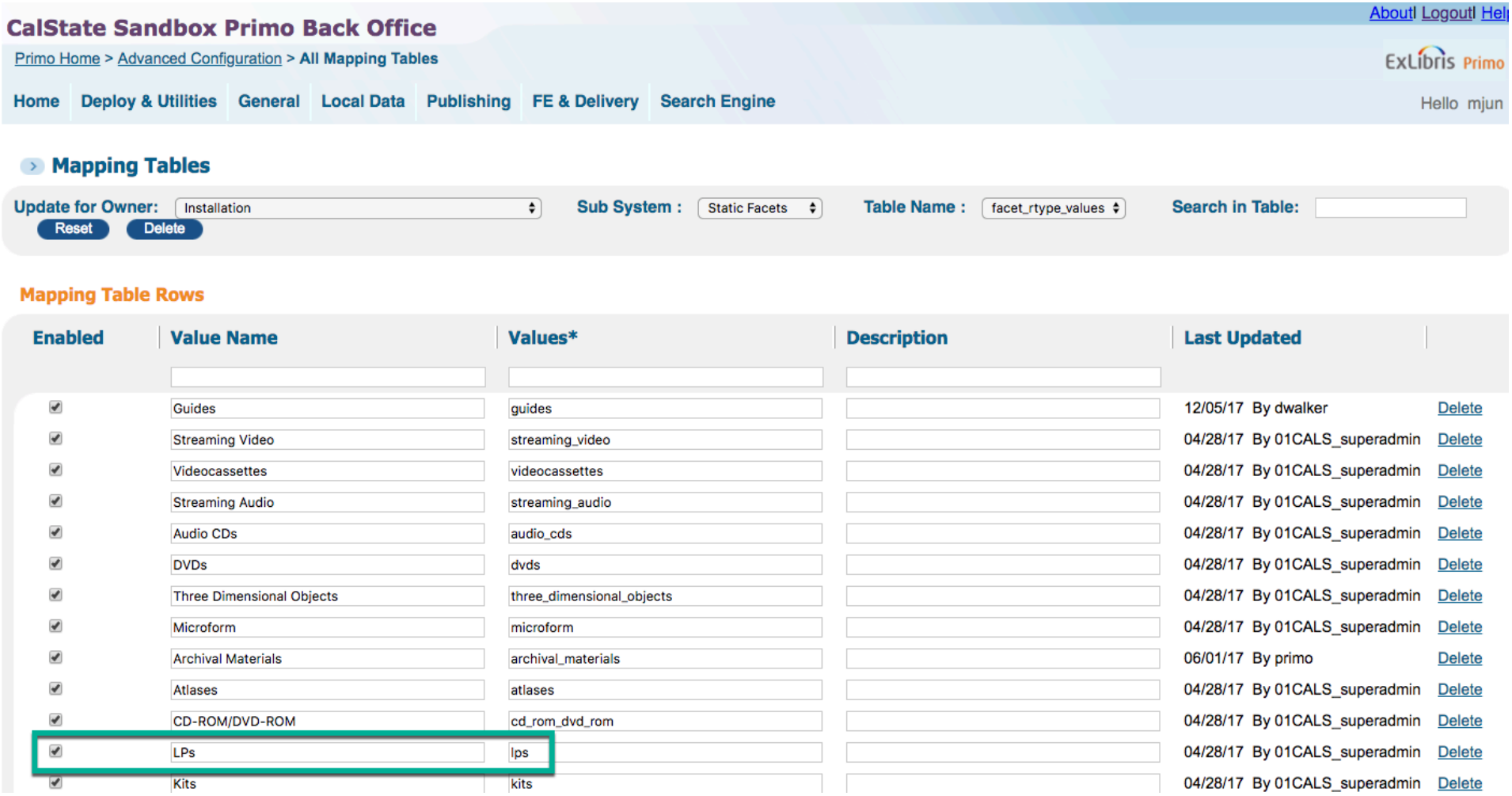
Because LPs does not already exist, add to table

Data in Values: "lps" should match constant value in norm rules.



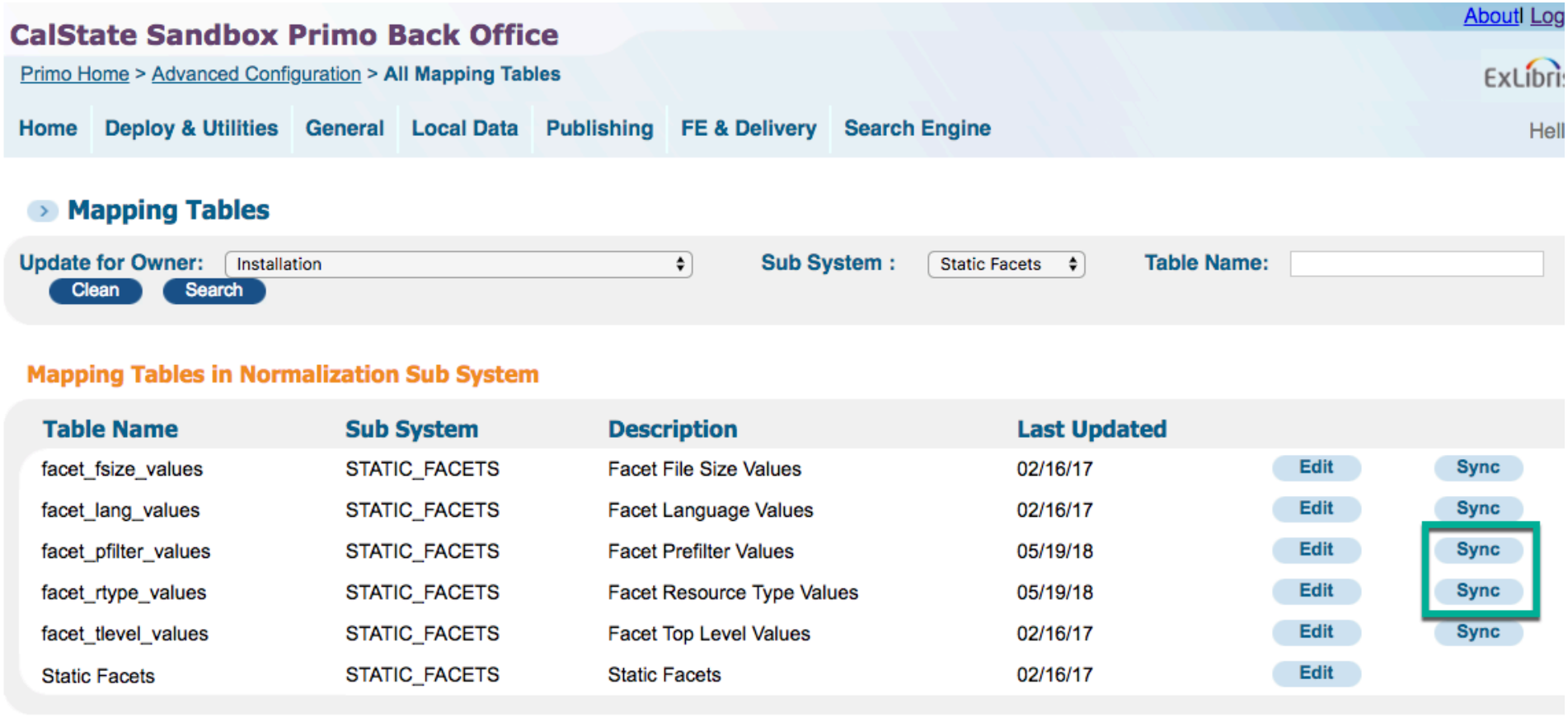
facet_rtype_values

LPs already exists in this table.



Sync

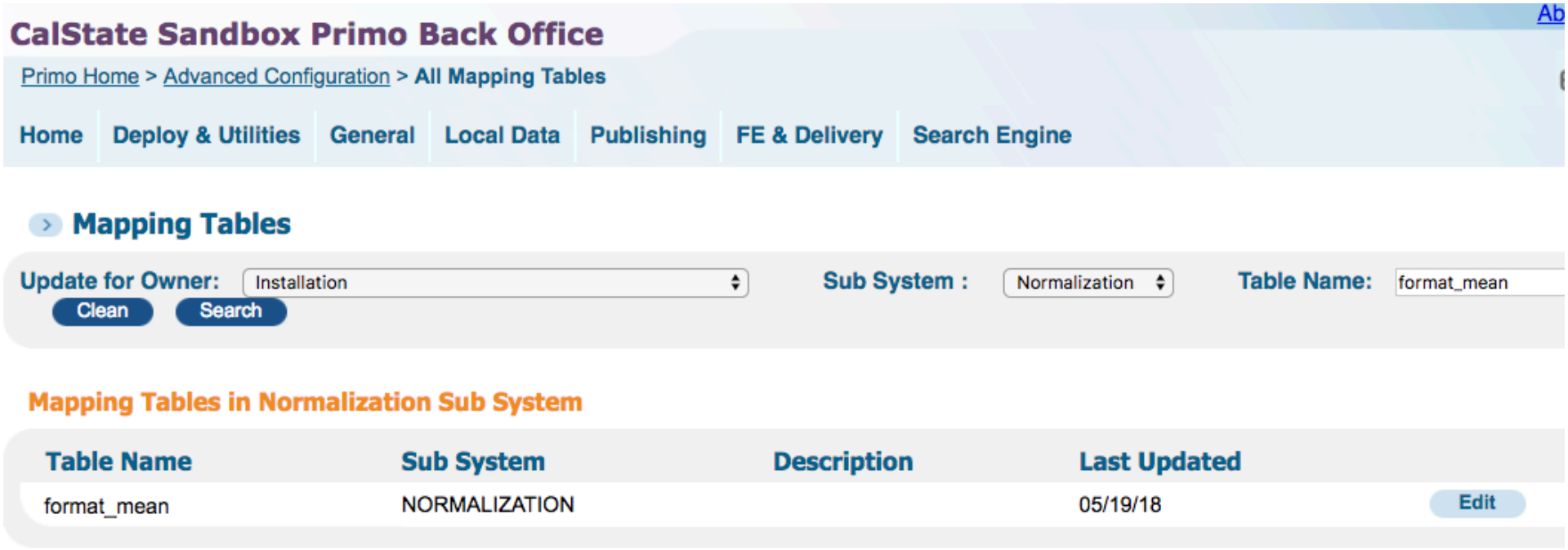
Sync both tables



(There's no confirmation message after you sync.)

5. Mapping tables, normalization

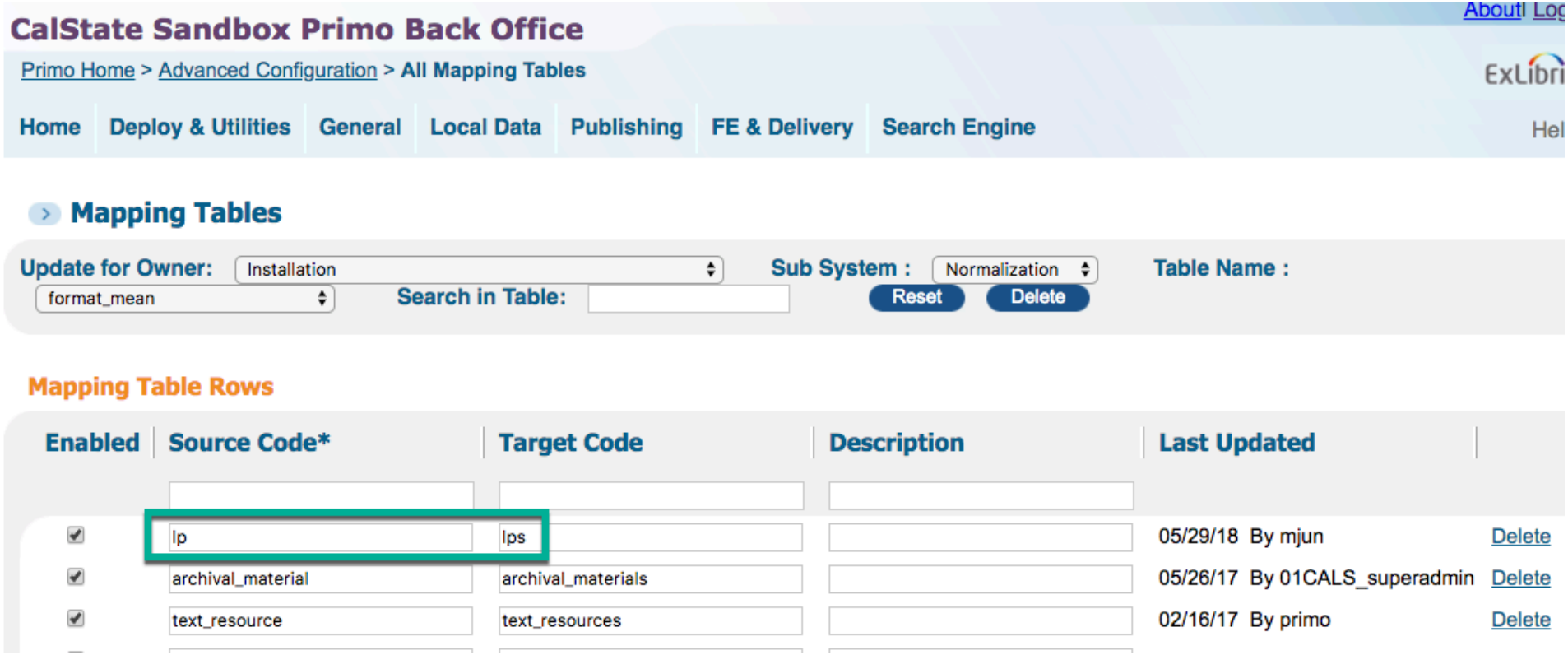
format_mean



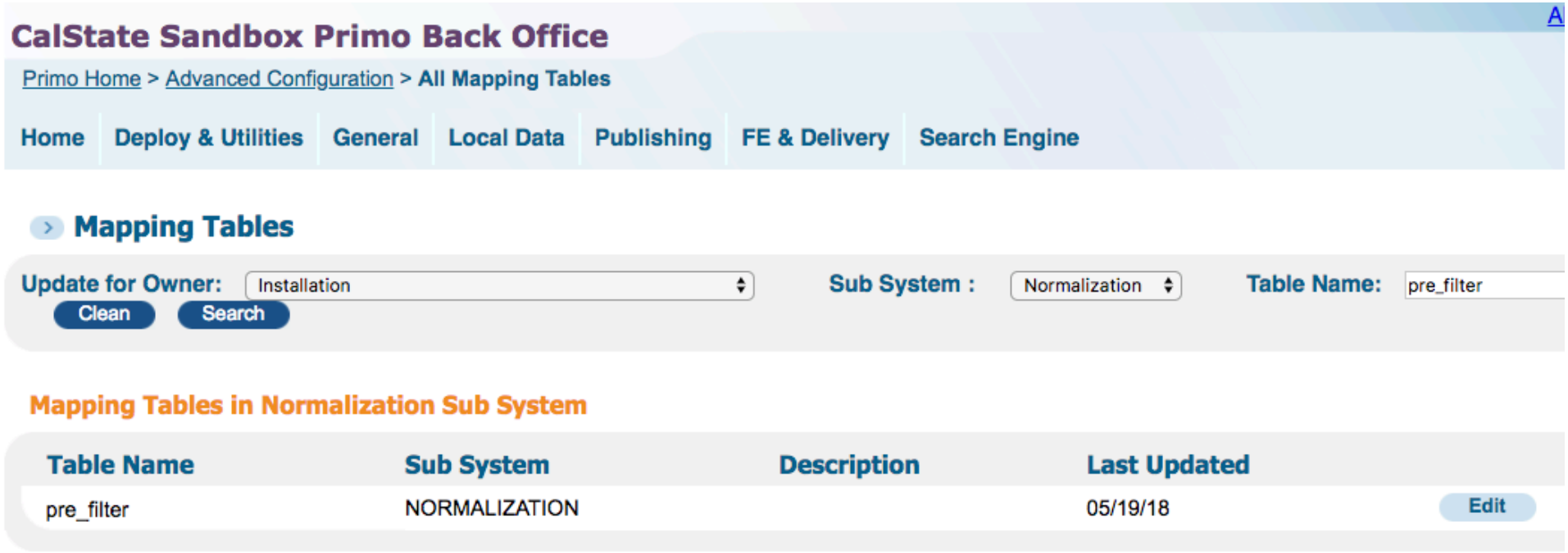
Because lp does not already exist, add to table.

Source code: singular

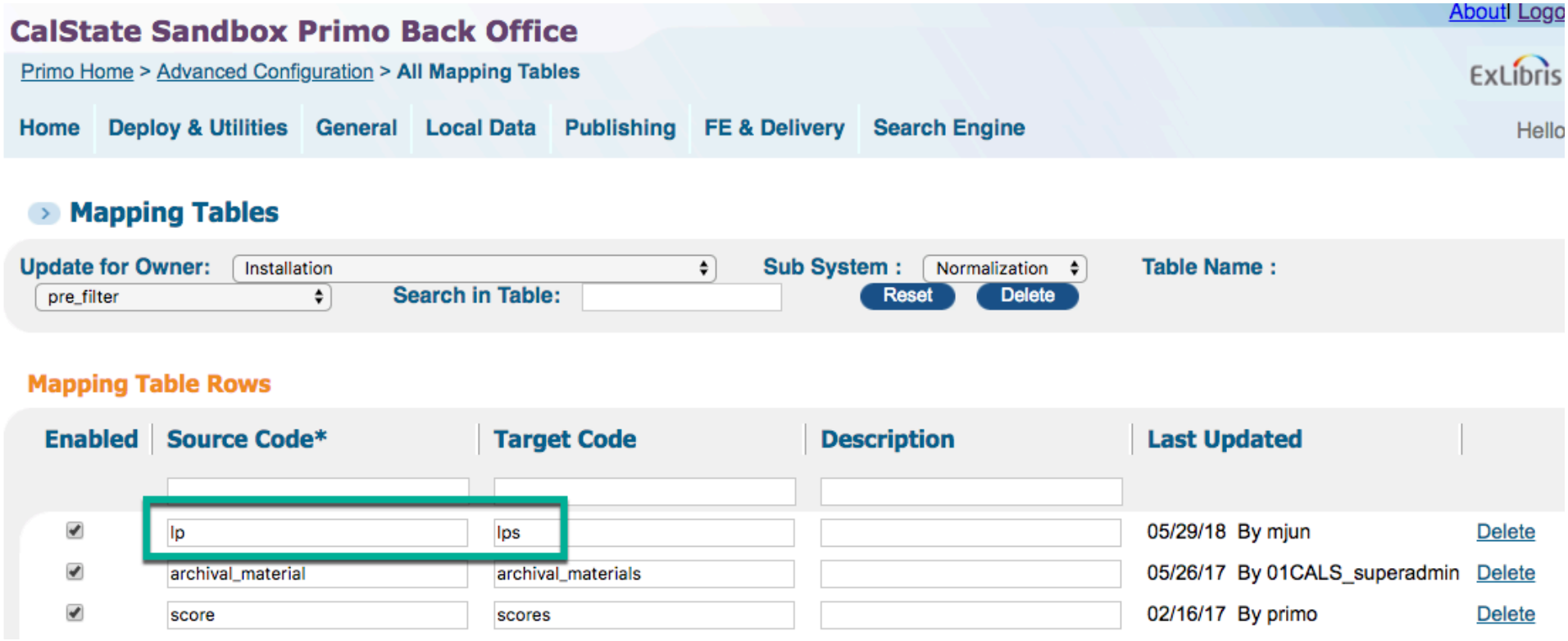
Target code: plural


CalState Sandbox Primo Back Office
About| Log
Primo Home > Advanced Configuration > All Mapping Tables
ExLibri
Home
Deploy & Utilities
General
Local Data
Publishing
FE & Delivery
Search Engine
Hel
Mapping Tables
Update for Owner:
Installation
Sub System :
Normalization
Table Name :
format_mean
Search in Table:
Reset
Delete
Mapping Table Rows
Enabled
Source Code*
Target Code
Description
Last Updated
lp
lps
05/29/18 By mjun
Delete
archival_material
archival_materials
05/26/17 By 01CALS_superadmin
Delete
text_resource
text_resources
02/16/17 By primo
Delete

pre_filter



Because lp does not already exist, add to table.

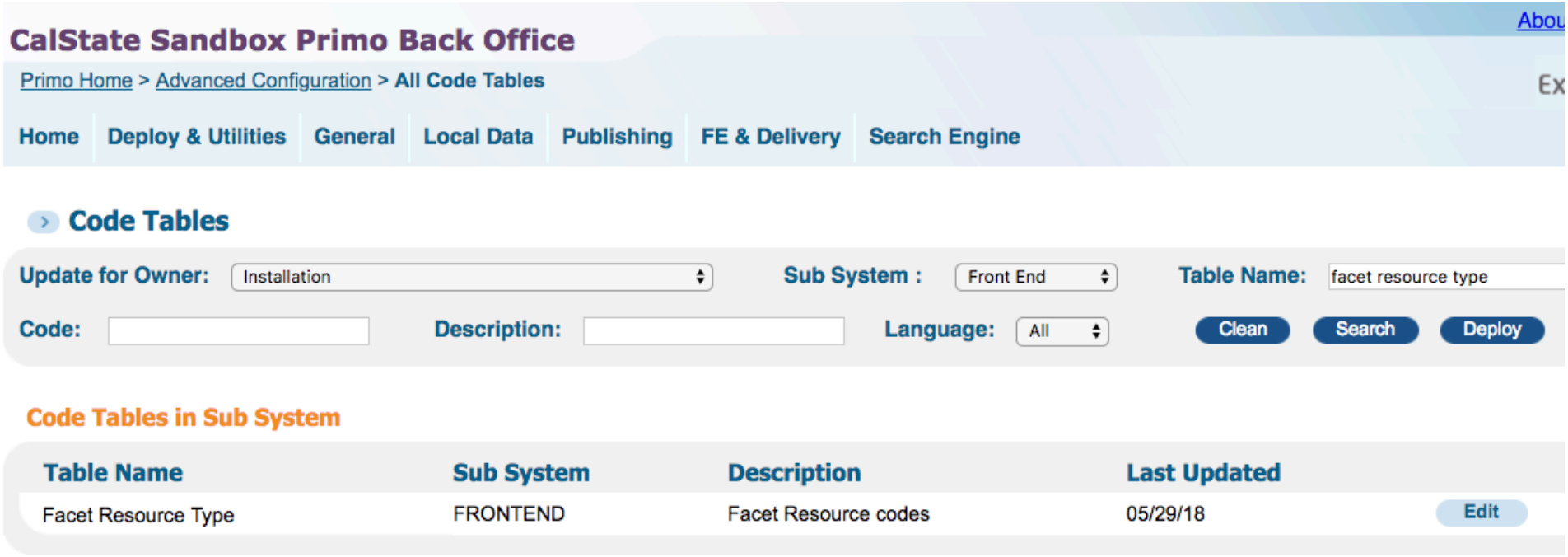


Source code: singular

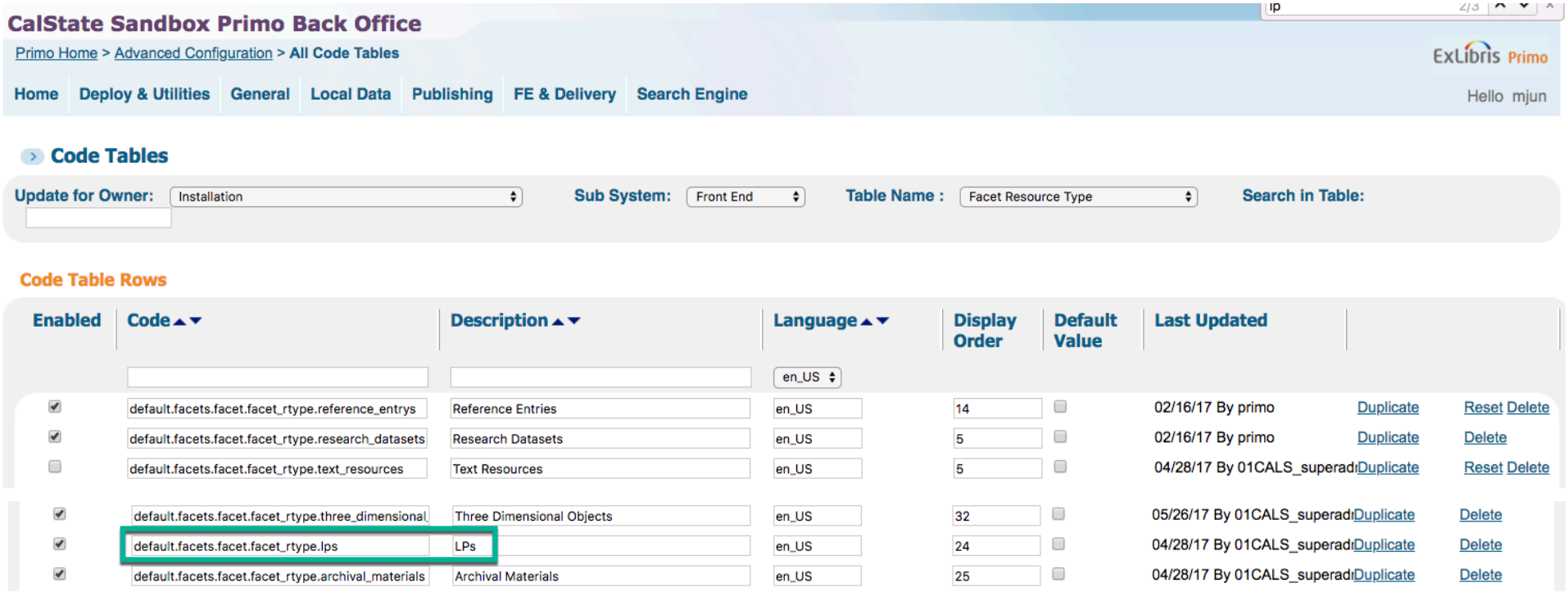
Target code: plural

6. Code tables, front end

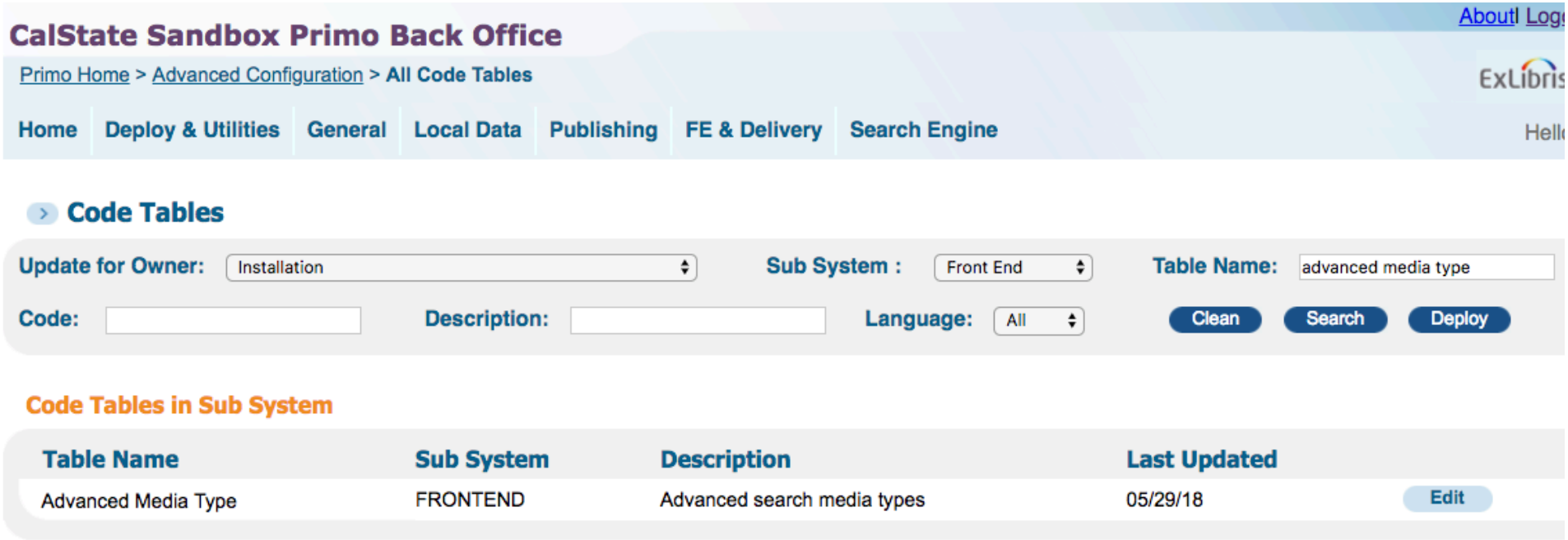
facet resource type



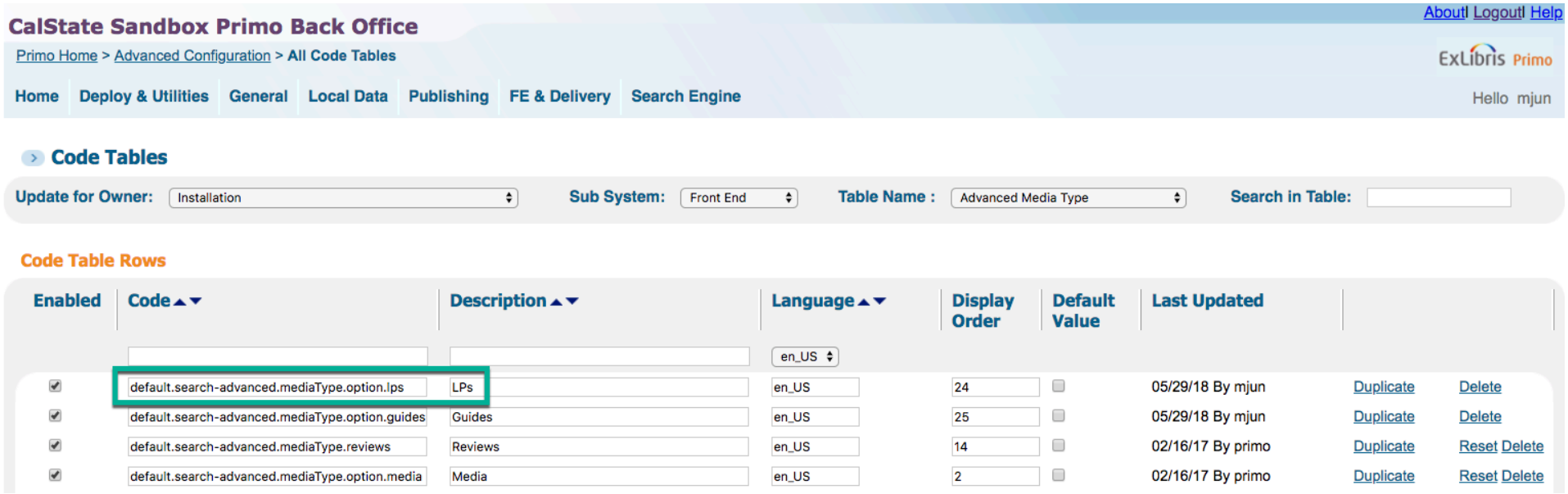
lps already exists



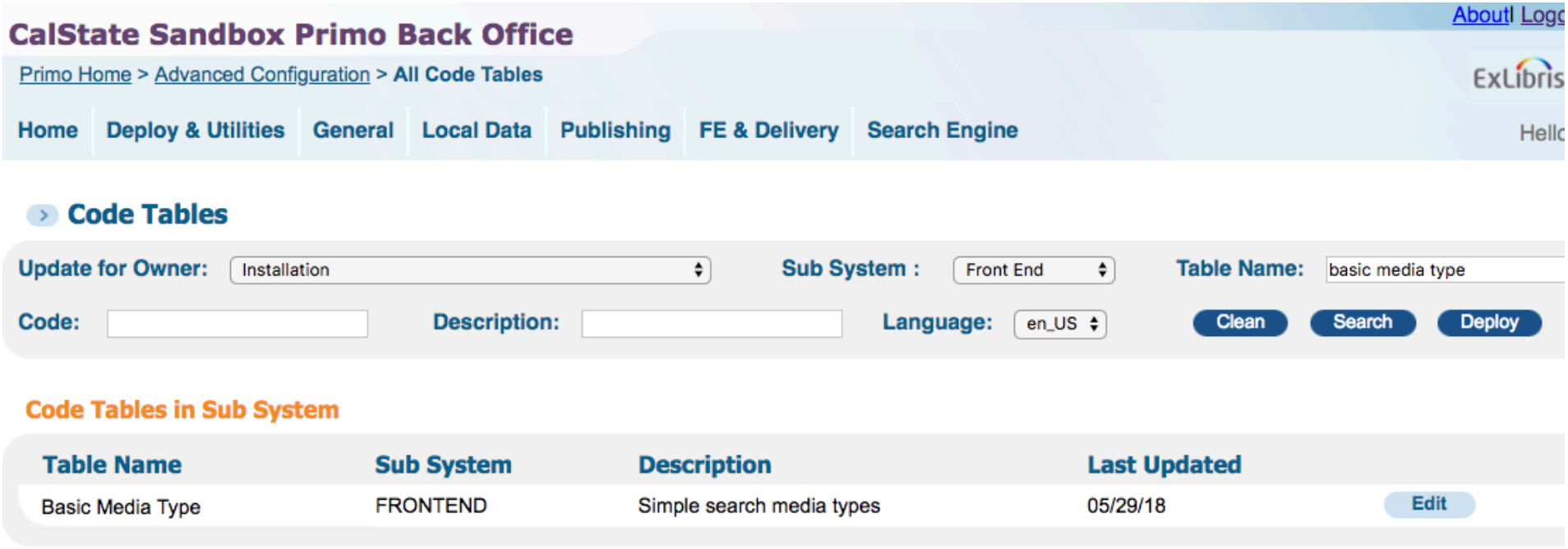
advanced media type



LPs automatically added through Sync?



basic media type



LPs automatically added through Sync?

CalState Sandbox Primo Back Office

Primo Home > Advanced Configuration > All Code Tables

ExLibris Primo

Home | Deploy & Utilities | General | Local Data | Publishing | FE & Delivery | Search Engine

Hello mjun

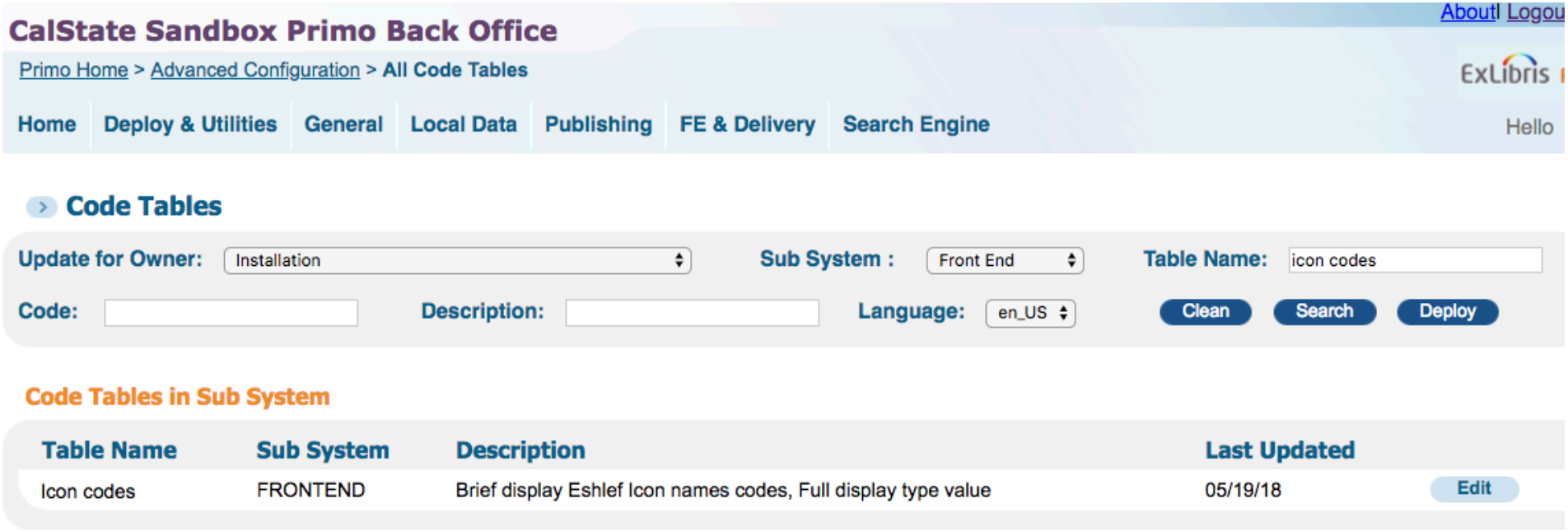
Code Tables

Update for Owner: Installation | Sub System: Front End | Table Name : Basic Media Type | Search in Table:

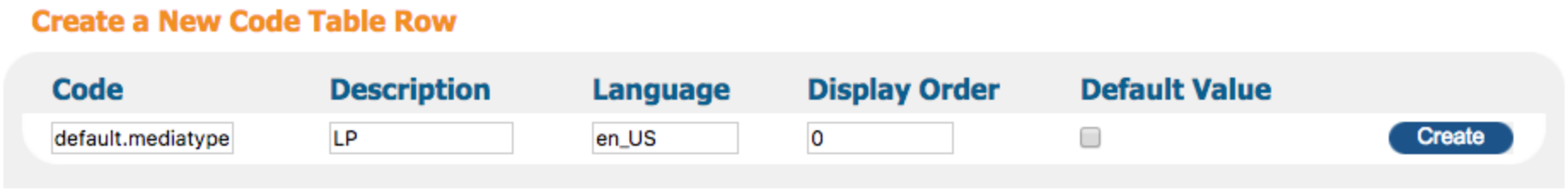
Code Table Rows

Enabled	Code	Description	Language	Display Order	Default Value	Last Updated		
			en_US					
☑	default.search-simple.mediaType.option.government	Government Documents	en_US	15	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.search-simple.mediaType.option.images	Images	en_US	4	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.search-simple.mediaType.option.journals	Journals	en_US	3	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.search-simple.mediaType.option.guides	Guides	en_US	25	☐	05/29/18 By mjun	Duplicate	Delete
☑	default.search-simple.mediaType.option.lps	LPs	en_US	24	☐	05/29/18 By mjun	Duplicate	Delete
☑	default.search-simple.mediaType.option.archival_ma	Archival Materials	en_US	0	☐	05/26/17 By 01CALS_superadm	Duplicate	Delete

icon codes



LP does not already exist, add to table



Code: default.mediatype.lp

Code Tables

Update for Owner: Installation Sub System: Front End Table Name : Icon codes Search in Table:

Code Table Rows

Enabled	Code	Description	Language	Display Order	Default Value	Last Updated		
			en_US					
☑	default.mediatype.journal	Journal	en_US	6	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.legal_document	Legal Document	en_US	19	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.map	Map	en_US	9	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.multiplever	Multiple Versions	en_US	25	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.newspaper_article	Newspaper Article	en_US	22	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.other	Other	en_US	0	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.patent	Patent	en_US	26	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.rare_book	Rare Book	en_US	15	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.reference_entry	Reference Entry	en_US	20	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.research_dataset	Research Dataset	en_US	4	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.review	Review	en_US	16	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.score	Score	en_US	11	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.statistical_data_set	Statistical Data Set	en_US	21	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.technical_report	Technical Report	en_US	5	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.video	Video	en_US	12	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.website	Website	en_US	14	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.text_resource	Text Resource	en_US	1	☐	02/16/17 By primo	Duplicate	Reset Delete
☑	default.mediatype.lp	LP	en_US	0	☐	05/29/18 By mjun	Duplicate	Delete
☑	default.mediatype.article	Article	en_US	8	☐	02/16/17 By primo	Duplicate	Reset Delete

facet_pfilter_values_codes

Code Tables

Update for Owner: 01CALS-Production Sub System: Front End Table Name : facet_pfilter_values_codes

Code Table Rows

Enabled	Code	Description	Language	Display Order
			All	
☑	default.facets.facet.facet_pfilter.archival_materials	Archival Materials	en_US	0
☑	default.facets.facet.facet_pfilter.articles	Articles	ta_IN	0
☑	default.facets.facet.facet_pfilter.audio_video	Audio Visual	ta_IN	3
☑	default.facets.facet.facet_pfilter.books	Books	ta_IN	4
☑	default.facets.facet.facet_pfilter.databases	Databases	ta_IN	6
☑	default.facets.facet.facet_pfilter.images	Images	ta_IN	2
☑	default.facets.facet.facet_pfilter.journals	Journals	ta_IN	1
☑	default.facets.facet.facet_pfilter.websites	Web Sites	ta_IN	5

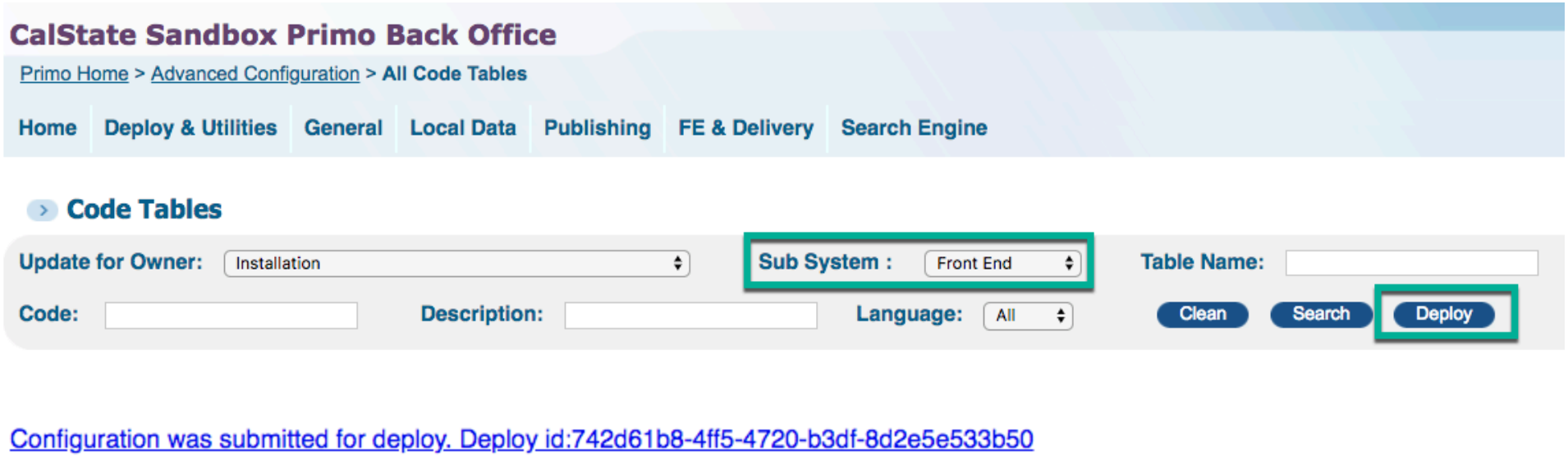
Table Description: Facet Resource codes

Create a New Code Table Row

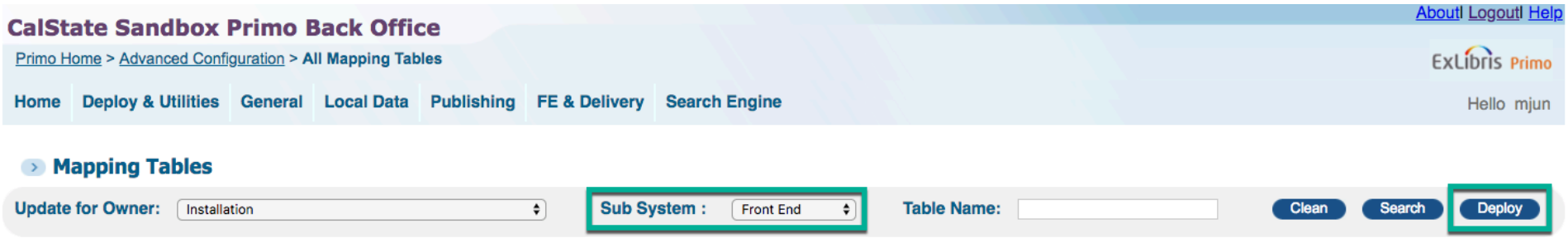
Code	Description	Language	Display Order
			0

7. Deploy code and mapping tables (front end)

Code tables, front end

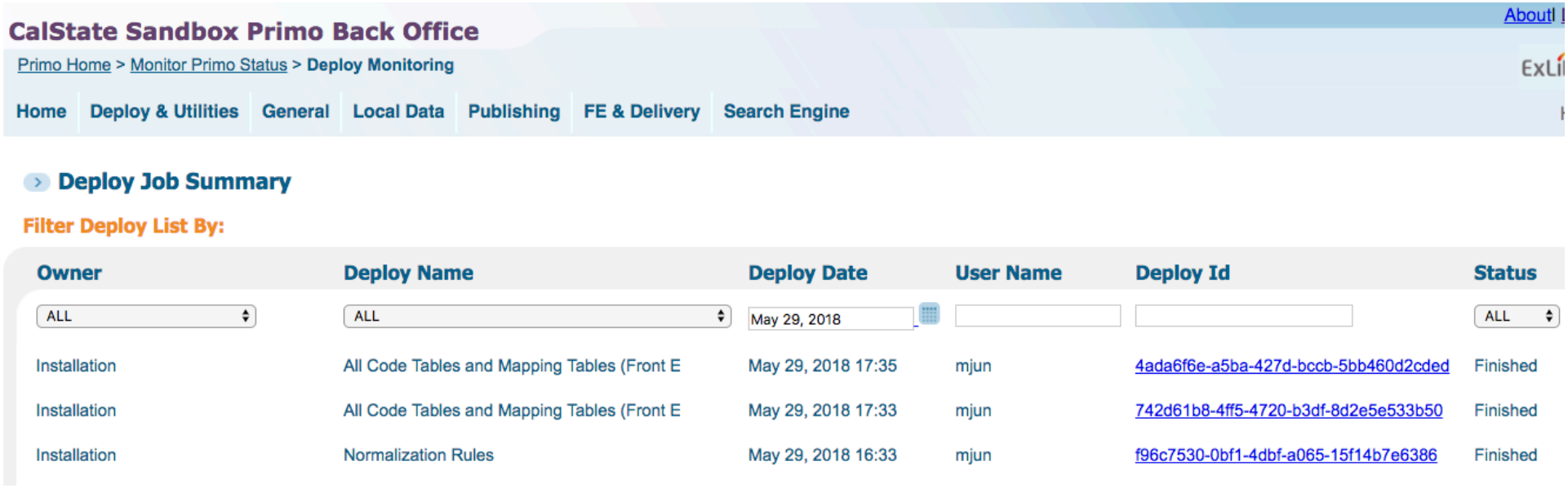


Mapping tables, front end



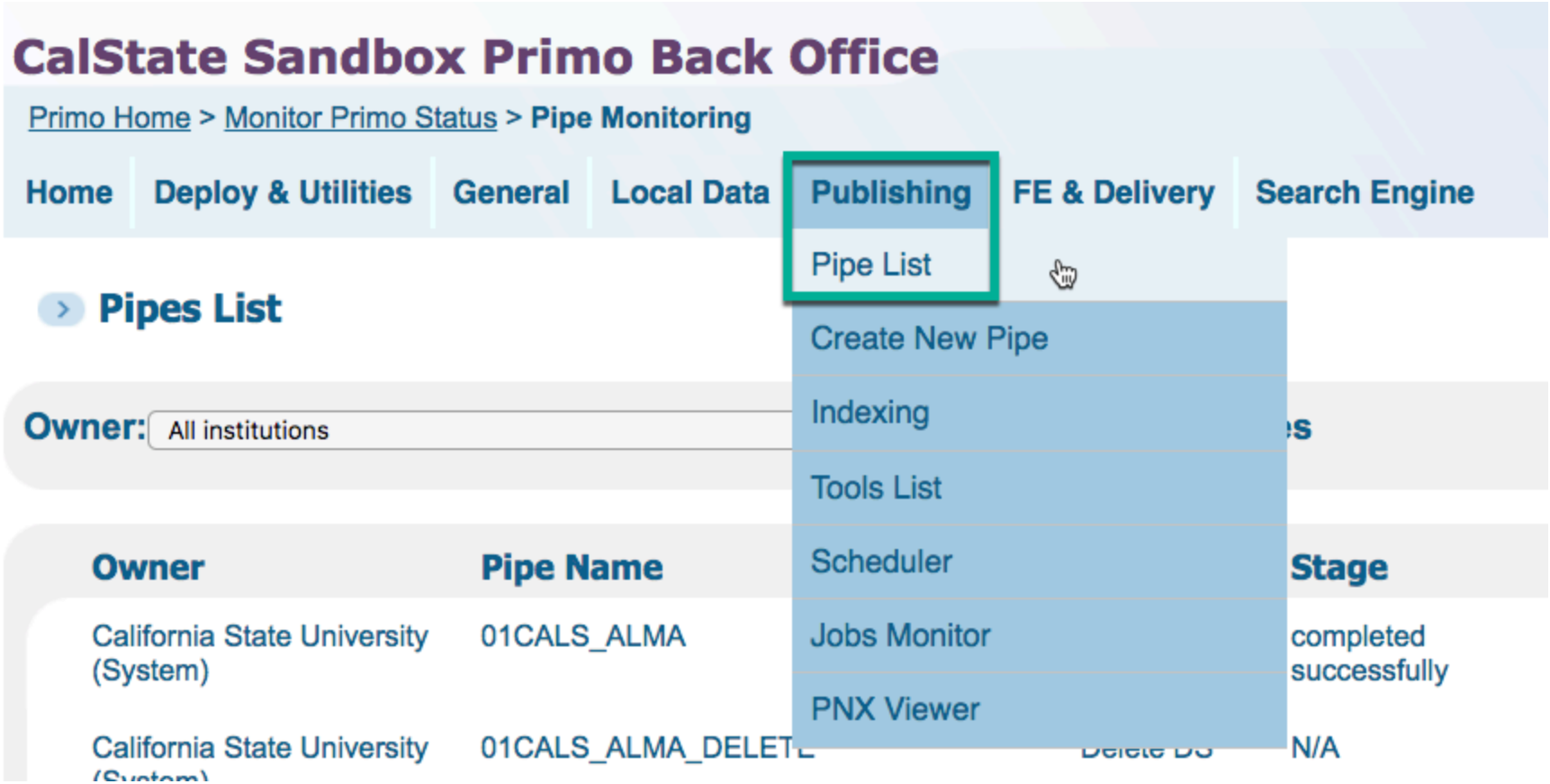
Configuration was submitted for deploy. Deploy id:4ada6f6e-a5ba-427d-bccb-5bb460d2cded

Deploy monitoring



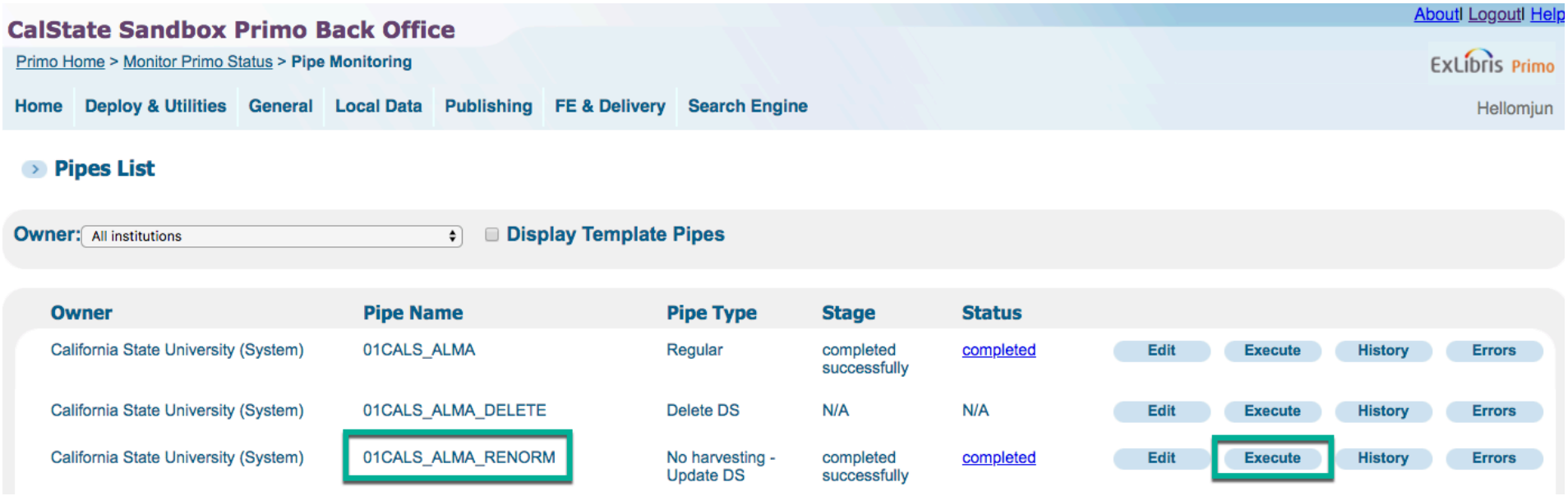
8. Run renorm

Publishing, Pipe List

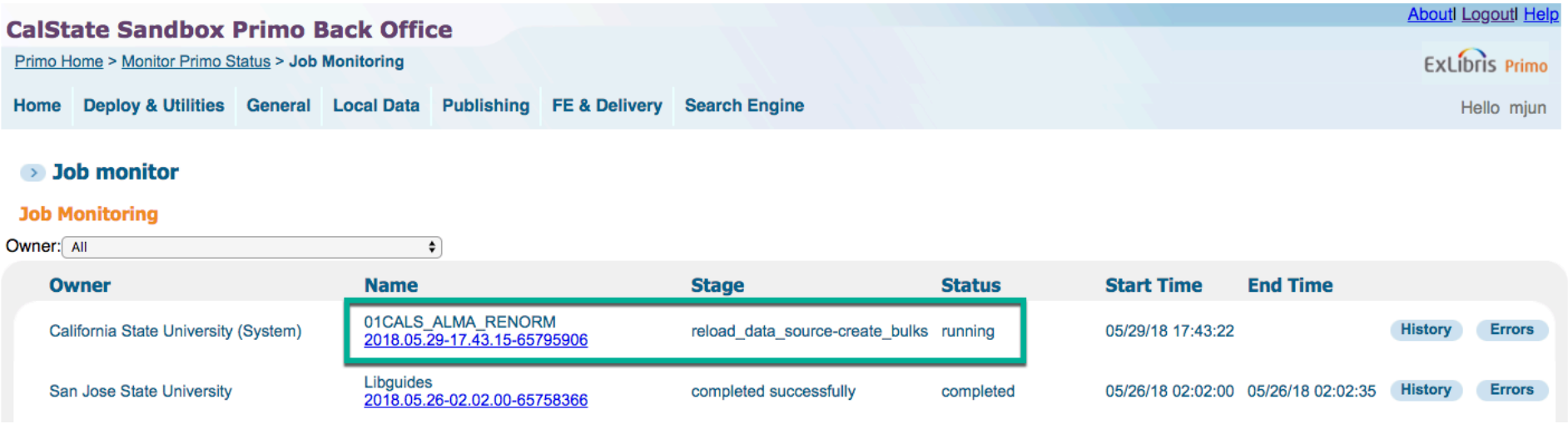


01_CALS_ALMA_RENORM

(Sandbox: approx: 30 minutes)

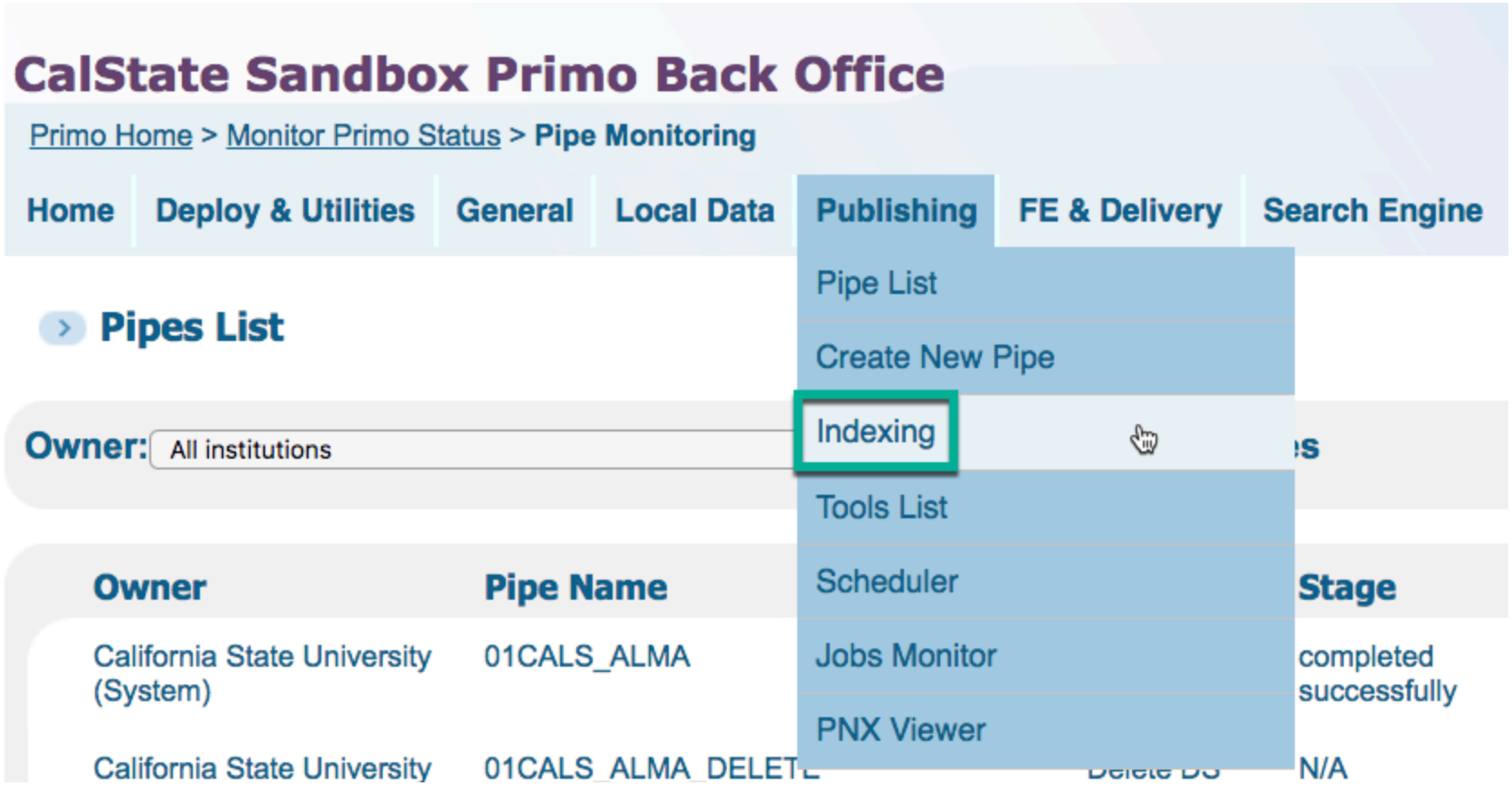


Monitor primo status, process monitoring



After you execute the renorm pipe, then run indexing and hotswapping.
(You can execute both jobs successively. After the renorm finishes, the indexing and hotswapping will begin.)

Publishing, Indexing



Indexing_and_Hotswapping

(Sandbox: approx. 1 hour?)

To monitor the status of the jobs,

Monitor primo status, job monitoring

(Sandbox: total time 1.5 - 2 hours)

9. Add icons for new/revised formats

Download the central package

Deploy & Utilities, Customization Manager

Central package: download

CalState Sandbox Primo Back Office

Primo Home > Primo Utilities > UI customization Package Manager

Home | Deploy & Utilities | General | Local Data | Publishing | FE & Delivery | Search Engine

UI customization Package Manager

Owner: All Institutions View* CENTRAL_PACKAGE

Download a Package

Template package Download

Central package Download Delete

Upload package forCENTRAL_PACKAGE

Choose File No file chosen Upload

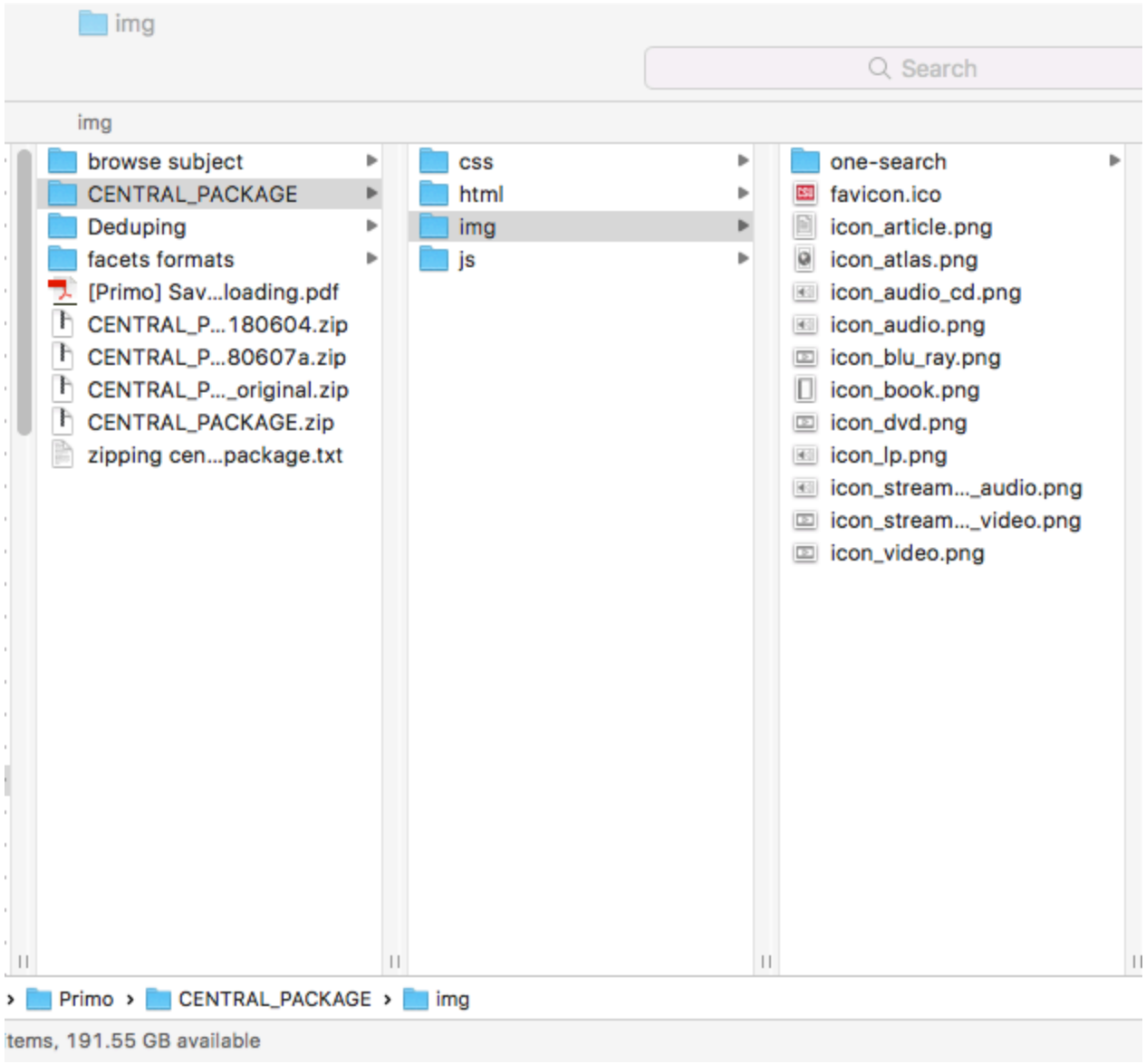
Upload Logo forCENTRAL_PACKAGE

Choose File No file chosen Upload Delete

Logo Clickable Url Save

Add icons

The central package is in a zip file, CENTRAL_PACKAGE.zip, unzip it, and add icons to the folder CENTRAL_PACKAGE/img/



The filename should be "icon_*format_name*.png"

The format name must be the same as the display constant value in your display type norm rules.
https://docs.google.com/document/d/1NG0Kv4zOXN1QsreHArl_EG7q7Jf4Lgtb0lLlp-0Xxcc/edit#heading=h.zg2lcmtu1ylr

Zip the CENTRAL_PACKAGE folder

(In WIndows, Exlibris recommends using 7zip or Winrar rather than Windows' built-in zip functionality: https://knowledge.exlibrisgroup.com/Primo/Knowledge_Articles/What_might_be_the_issue_where_uploading_the_New_UI_Customization_package_doesn't_work)

(For Mac, use the Terminal to navigate to the CENTRAL_PACKAGE folder and enter the following command

```
zip -r CENTRAL_PACKAGE.zip CENTRAL_PACKAGE -x "*.DS_Store"
```

Upload

Upload CENTRAL_PACKAGE.zip into Primo Back Office.

CalState Sandbox Primo Back Office

Primo Home > Primo Utilities > UI customization Package Manager

Home | Deploy & Utilities | General | Local Data | Publishing | FE & Delivery | Search Engine

UI customization Package Manager

Owner: All Institutions View* CENTRAL_PACKAGE

Download a Package

Template package Download

Central package Download Delete

Upload package forCENTRAL_PACKAGE

Choose File No file chosen Upload

Upload Logo forCENTRAL_PACKAGE

Choose File No file chosen Upload Delete

Logo Clickable Url Save

From Primo Back Office homepage, go to Ongoing Configuration Wizard, Views Wizard,

Select your campus' Main View. Save and continue (multiple times) to Deploy.

See also: https://docs.google.com/document/d/1JuUTT7l6zmhKGl41EVh8eJyaxJnLYEoiKv8Qwq7EobM/edit?usp=sharing

Advanced search : updating material types

In Primo Back Office

Ongoing Configuration Wizards

CalState Sandbox Primo Back Office

Welcome to Primo Back Office - monitor and configure your settings

Home | Deploy & Utilities | General | Local Data | Publishing | FE & Delivery | Search Engine

Monitoring & Maintenance

Monitor Primo Status
Stay in control with one glance of all aspects of Primo performance

Primo Utilities
Cleanup procedures and More

Primo Reports
View available reports or catalog a new report

Schedule Tasks
Schedule Primo tasks such as harvesting, reloading indexes and more

PNX Viewer
Browse PNX files

Configuration & Management wizards

Ongoing Configuration Wizards
Configure and manage the Staff, Institutions, Views, Data sources and Pipes settings to maintain the proper function of Primo

Advanced Configuration
Manage the advanced features of Primo, like Search Engine, Installation, UI and PNX

Views Wizard

CalState Sandbox Primo Back Office

Primo Home > **Ongoing Configuration Wizards**

Home | Deploy & Utilities | General | Local Data | Publishing | FE & Delivery | Search Engine

Ongoing Configuration Wizards

Institution Wizard
Manage and configure Institution setting

Pipe Configuration Wizard
Manage and configure Data Sources and Pipes settings

Restrictions and Delivery Configuration Wizard
Configure Search Restrictions and Delivery Functionality

Views Wizard
Manage and configure View settings

Staff Configuration Wizard
Manage and configure staff settings

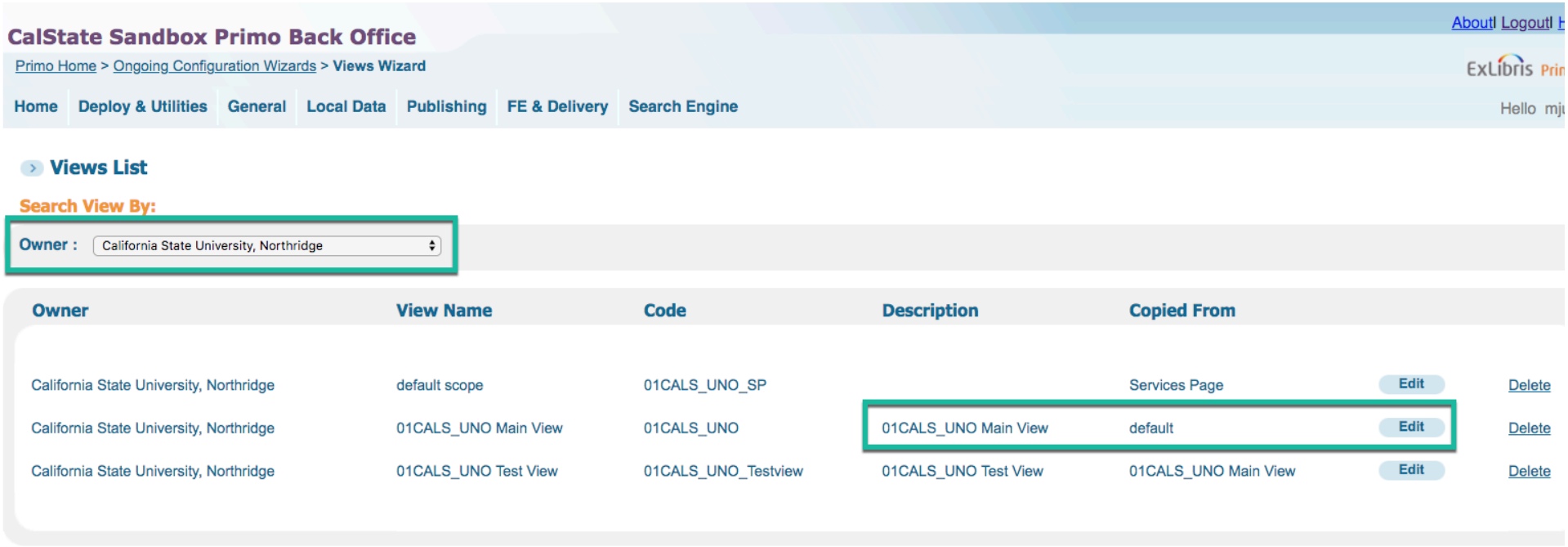
Configure User Groups
Configure user groups for end user restrictions

User Authentication Wizard
Manage and configure authentication settings

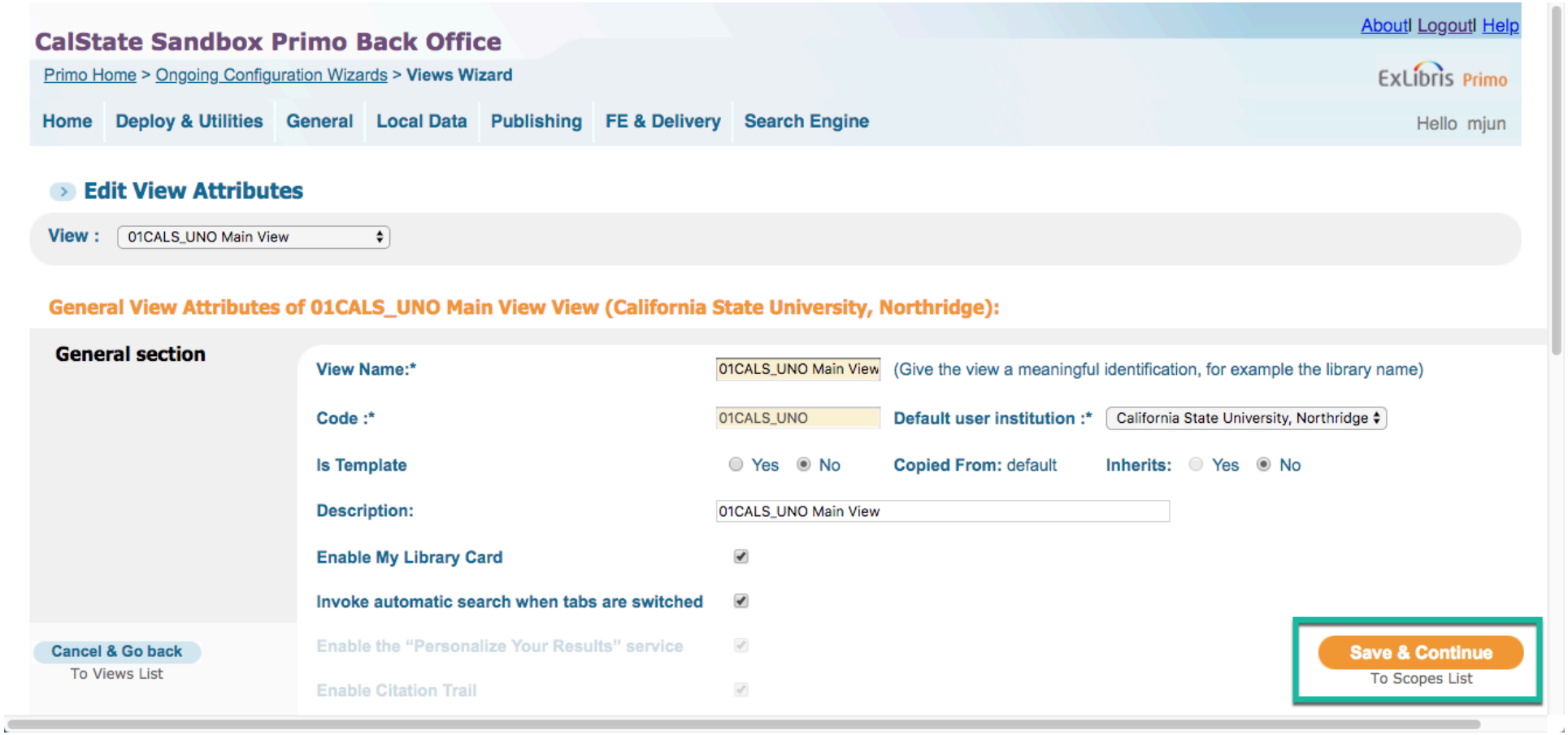
PDS Configuration Wizard
Manage and configure PDS settings

Select a campus and edit its Main View

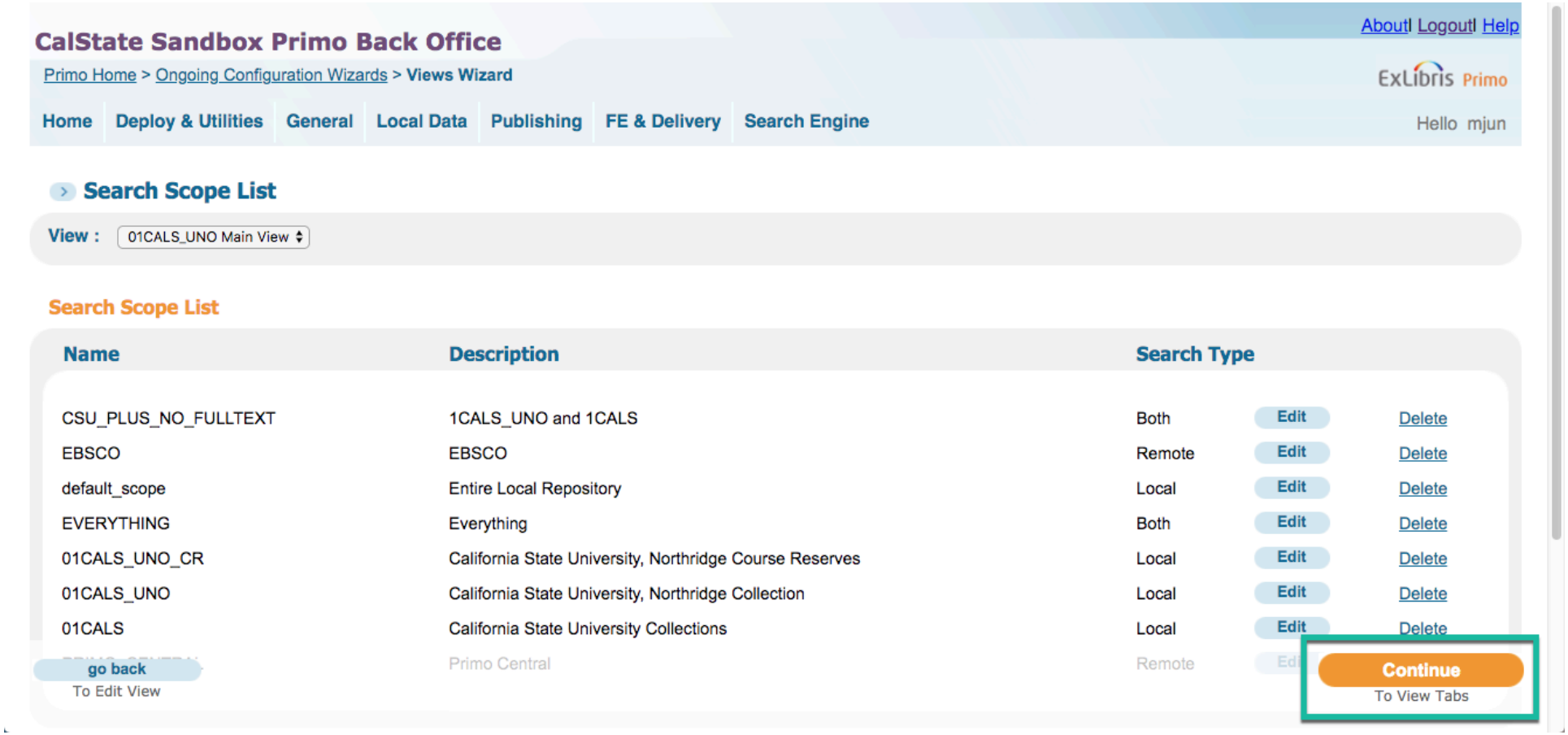
(In the screenshot below, I chose Cal State Northridge and edited its Main View.)



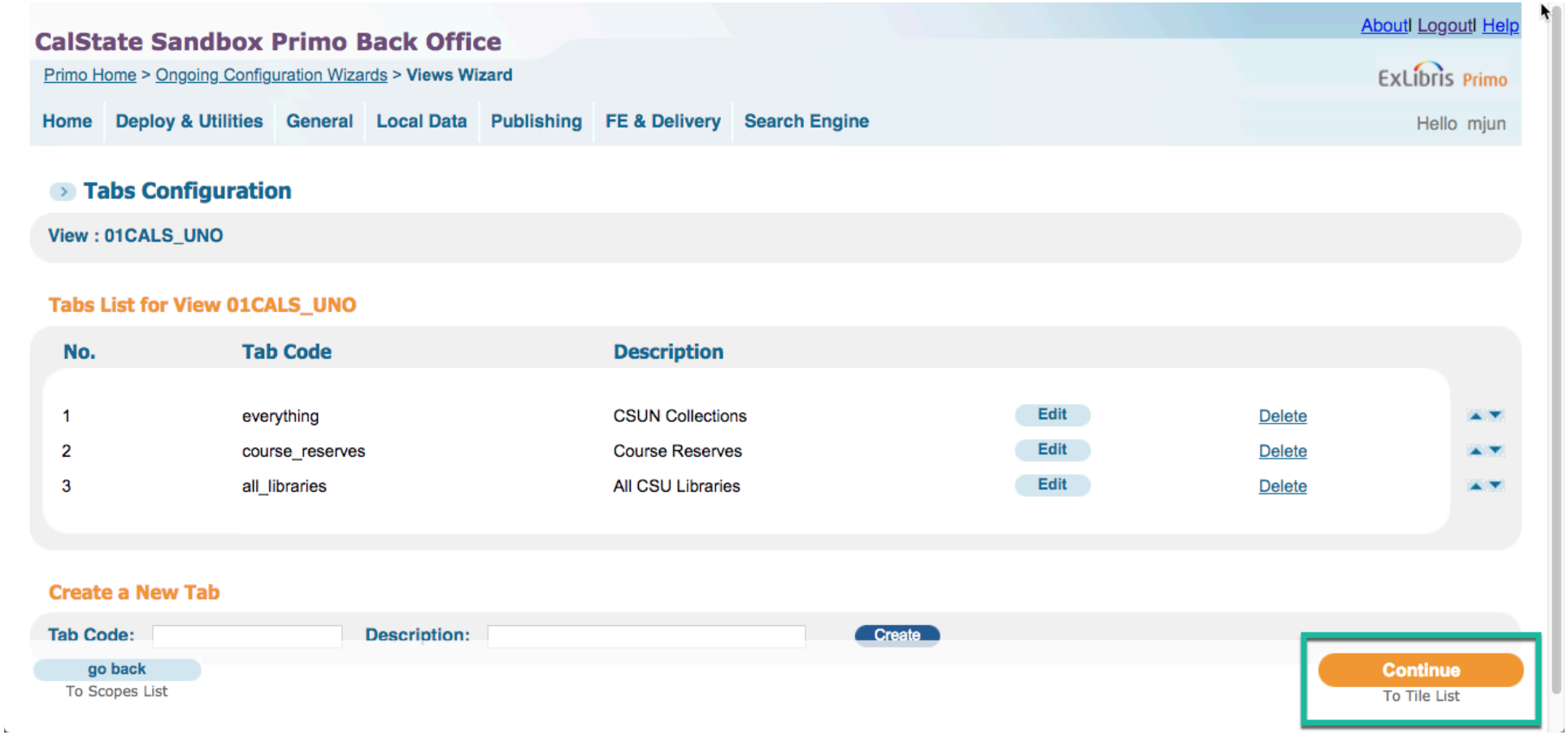
Save & Continue to Scopes List



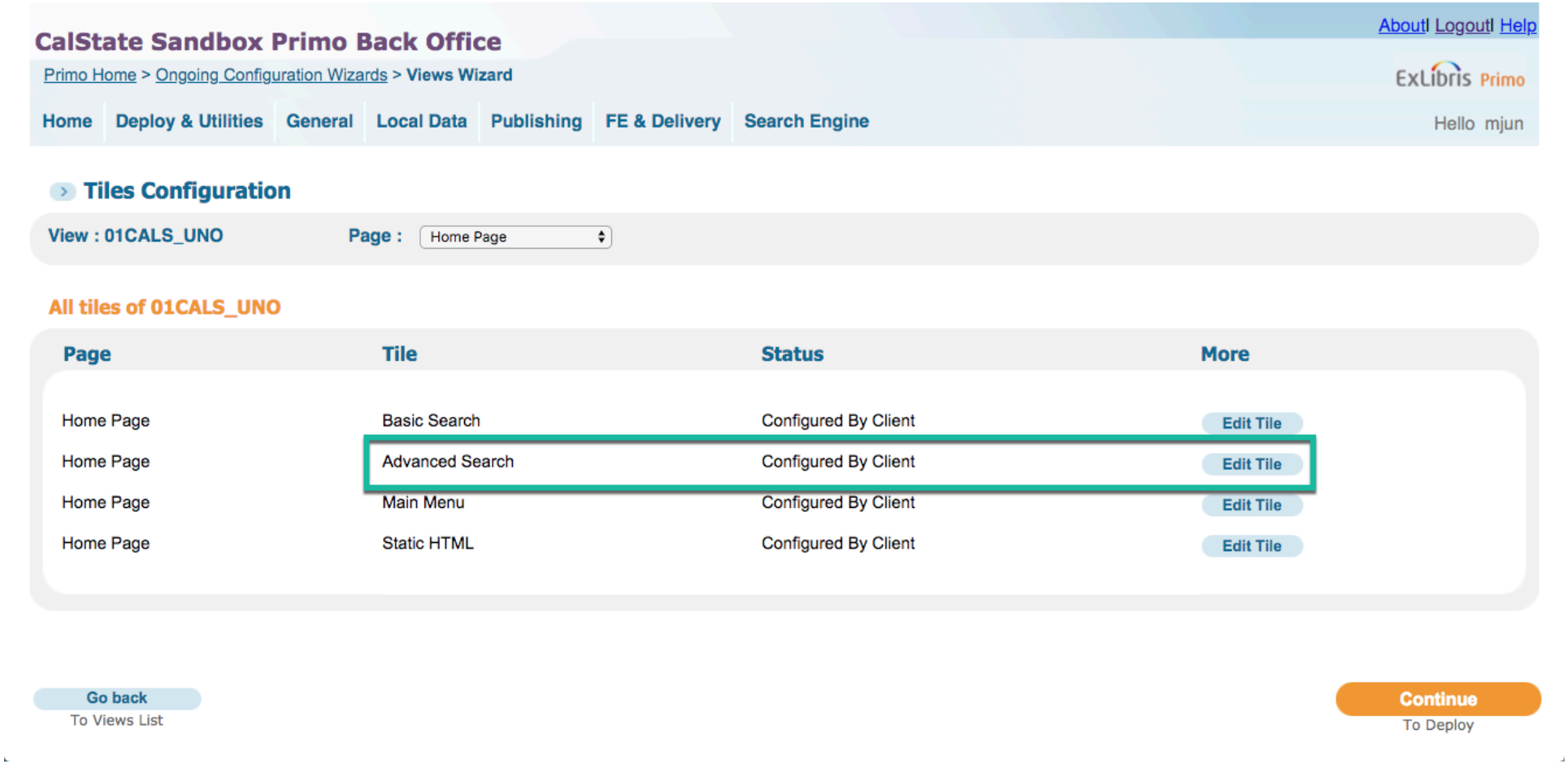
Continue to View Tabs



Continue to Tile List



Advanced Search, Edit Tile



Material Type, Edit

Edit Advanced Search Attributes

View :01CALS_UNO Tile : Advanced Search

Texts of Advanced Search Tile

Interface Language:: English

Code	English Label
Opening Text	
Ending Text	

Define search pre-filters

Search Type	Search Status	everything	course_reserves	all_libraries		
Complex Search Line 25	User Defined	☑	☐	☑	Edit	Delete
Complex Search Line 1	User Defined	☑	☐	☑	Edit	Delete
Complex Search Line 21	User Defined	☑	☐	☑	Edit	Delete
Publication Date	Default	☑	☐	☑	Edit	Delete
Material Type 5	User Defined	☑	☑	☑	Edit	Delete
Languages 1	User Defined	☑	☑	☑	Edit	Delete
Date Range	Default	☑	☑	☑		Delete
Complex Search Line 22	User Defined	☐	☑	☐	Edit	Delete
Complex Search Line 23	User Defined	☐	☑	☐	Edit	Delete
Complex Search Line 24	User Defined	☐	☑	☐	Edit	Delete

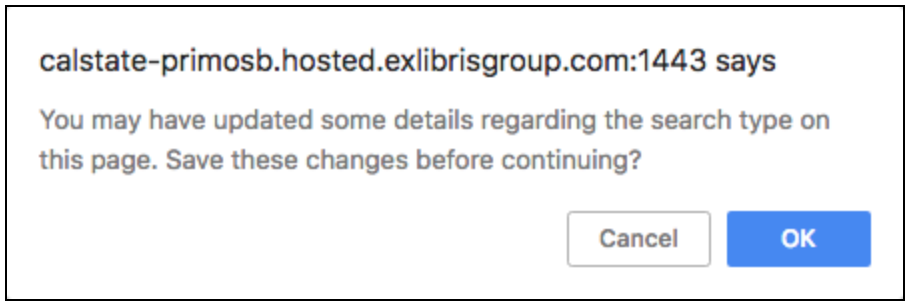
Create a new search option Search Type: Publication Date Create

Cancel & Go back
To Tiles List

Advanced search options

Save & Continue
To Tiles List

OK


calstate-primosb.hosted.exlibrisgroup.com:1443 says
You may have updated some details regarding the search type on this page. Save these changes before continuing?
Cancel
OK

Select the media type/material types you wish to display in Primo's advanced search.

The order of the media/material types in the Back Office is the same as they will appear in Primo's advanced search material type drop-down.

To change the order of the media/material types, use the up and down arrows.
(It's very tedious so save your work periodically by clicking on Save & Continue.)

Edit Advanced Search Attributes

View :01CALS_UST Tile : Advanced Search

Interface Language: English

Search Target Media Types of Advanced Search tile:

Media Type	Display	Default
Books	☑	○
Articles	☑	○
Journals	☑	○
Images	☑	○
Scores	☐	○
Maps	☐	○
All items	☑	◉
Databases	☐	○
Web Sites	☐	○
Research Datasets	☐	○
Technical Reports	☐	○
Rare Books	☐	○
Legal Documents	☐	○
Reference Entries	☐	○

(After re-ordering, your list may look like the following:)

All items
Archival Materials
Articles
Atlases
Audios
Audio CDs
Blu-rays
Books
CD-ROM/DVD-ROMs
Databases
DVDs
Images
Journals
Kits
LPs
Maps
Medias
Scores
Three Dimensional Objects
Videos
Videocassettes
Web Sites

CalState Sandbox Primo Back Office

Search Engine

Edit Advanced Search Attributes

View :01CALS_UNO Tile : Advanced Search

Interface Language: English

Search Target Media Types of Advanced Search tile:

Media Type	Display	Default
All items	☑	◉
Archival Materials	☑	○
Articles	☑	○
Atlases	☑	○
Audios	☑	○
Audio CDs	☑	○
Blu-rays	☑	○
Books	☑	○
CD-ROM/DVD-ROMs	☑	○
Databases	☑	○
DVDs	☑	○
Images	☑	○
Journals	☑	○

Save & Continue to Advanced Tile Configuration.

Save & Continue to Tiles List

Edit Advanced Search Attributes

View :01CALS_UNO Tile : Advanced Search

Texts of Advanced Search Tile

Interface Language:: English

Code	English Label
Opening Text	
Ending Text	

Define search pre-filters

Search Type	Search Status	everything	course_reserves	all_libraries			
Complex Search Line 25	User Defined	☑	☐	☑	Edit	Delete	▲▼
Complex Search Line 1	User Defined	☑	☐	☑	Edit	Delete	▲▼
Complex Search Line 21	User Defined	☑	☐	☑	Edit	Delete	▲▼
Publication Date	Default	☑	☐	☑	Edit	Delete	▲▼
Material Type 5	User Defined	☑	☑	☑	Edit	Delete	▲▼
Languages 1	User Defined	☑	☑	☑	Edit	Delete	▲▼
Date Range	Default	☑	☑	☑		Delete	▲▼
Complex Search Line 22	User Defined	☐	☑	☐	Edit	Delete	▲▼
Complex Search Line 23	User Defined	☐	☑	☐	Edit	Delete	▲▼
Complex Search Line 24	User Defined	☐	☑	☐	Edit	Delete	▲▼

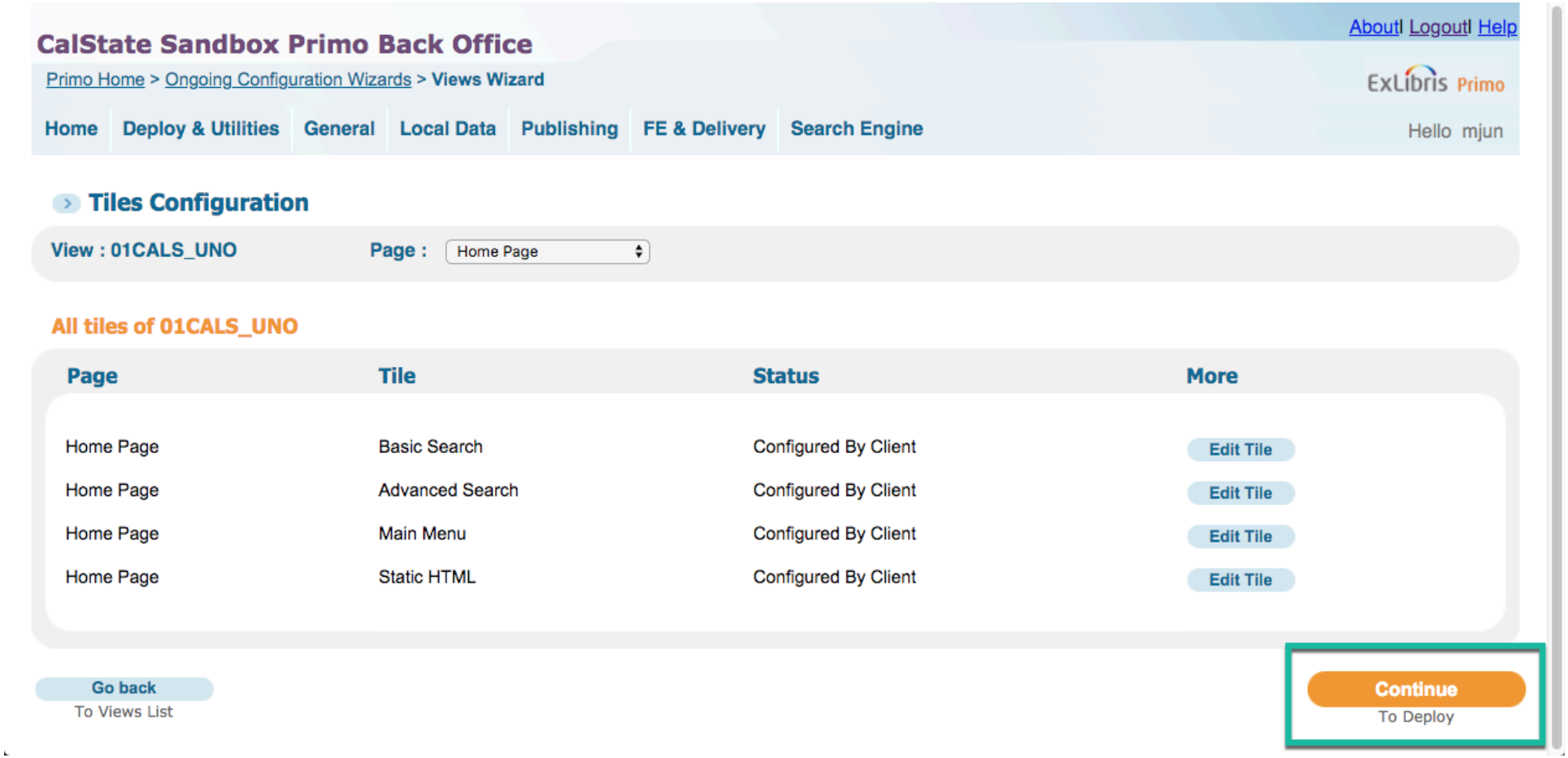
Create a new search option Search Type: Publication Date Create

Cancel & Go back
To Tiles List

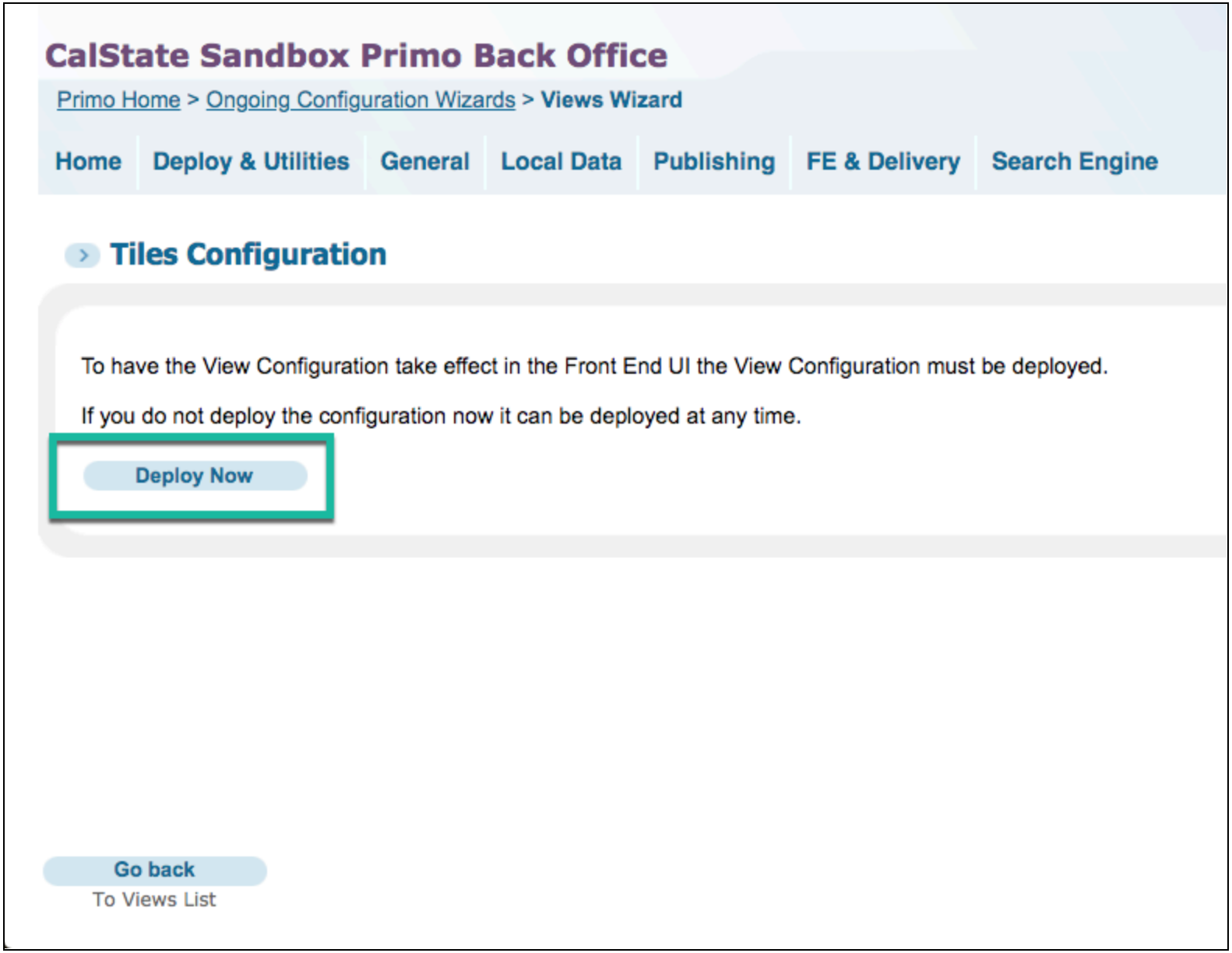
Advanced search options

Save & Continue
To Tiles List

Continue to Deploy

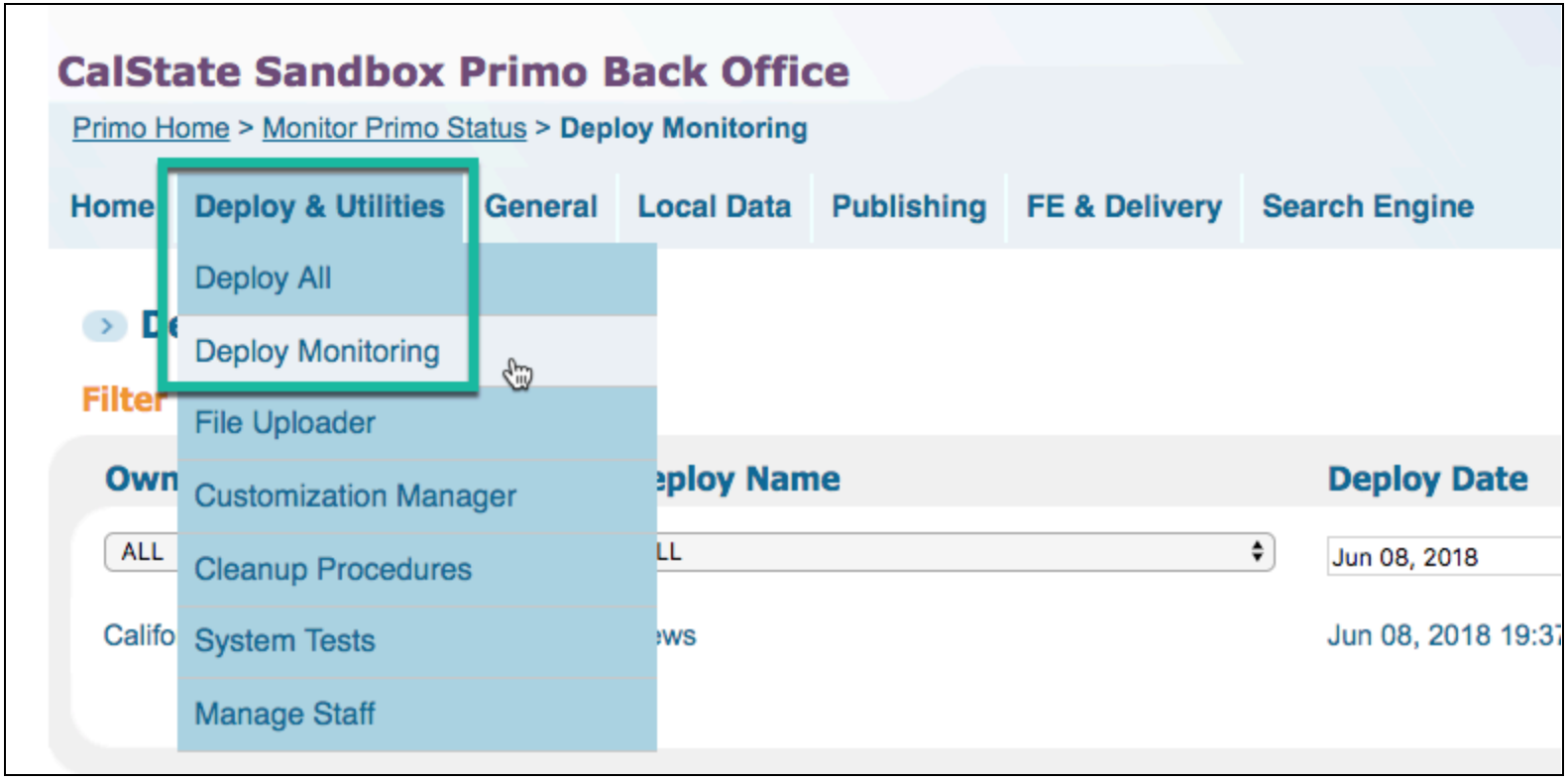


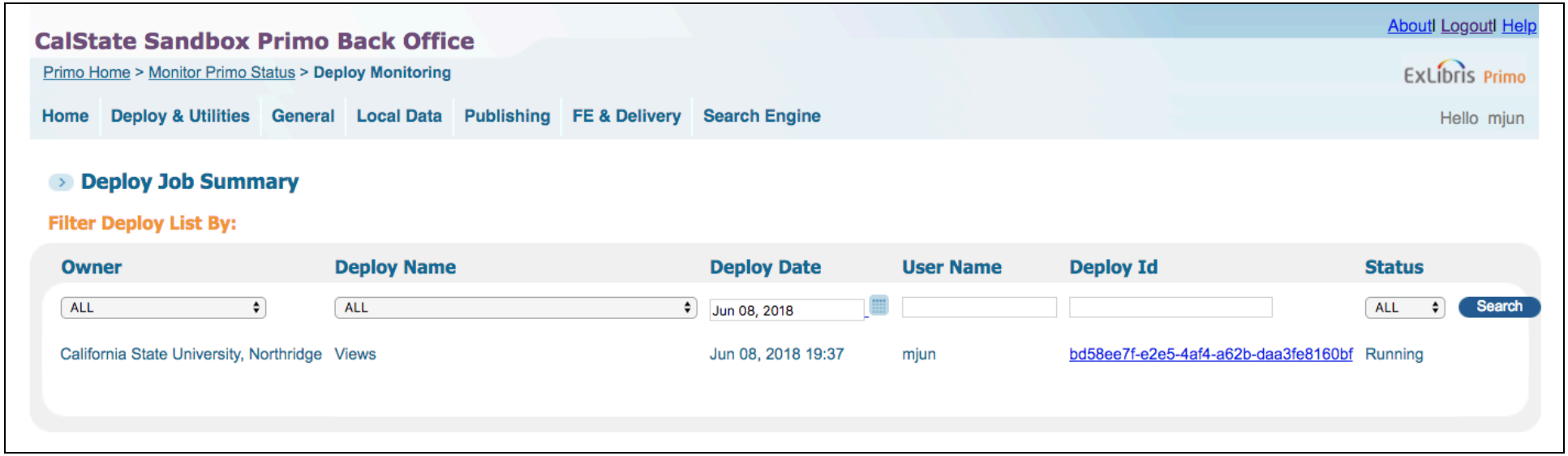
Deploy Now.


CalState Sandbox Primo Back Office
Primo Home > Ongoing Configuration Wizards > Views Wizard
Home
Deploy & Utilities
General
Local Data
Publishing
FE & Delivery
Search Engine
Tiles Configuration
To have the View Configuration take effect in the Front End UI the View Configuration must be deployed.
If you do not deploy the configuration now it can be deployed at any time.
Deploy Now
Go back
To Views List

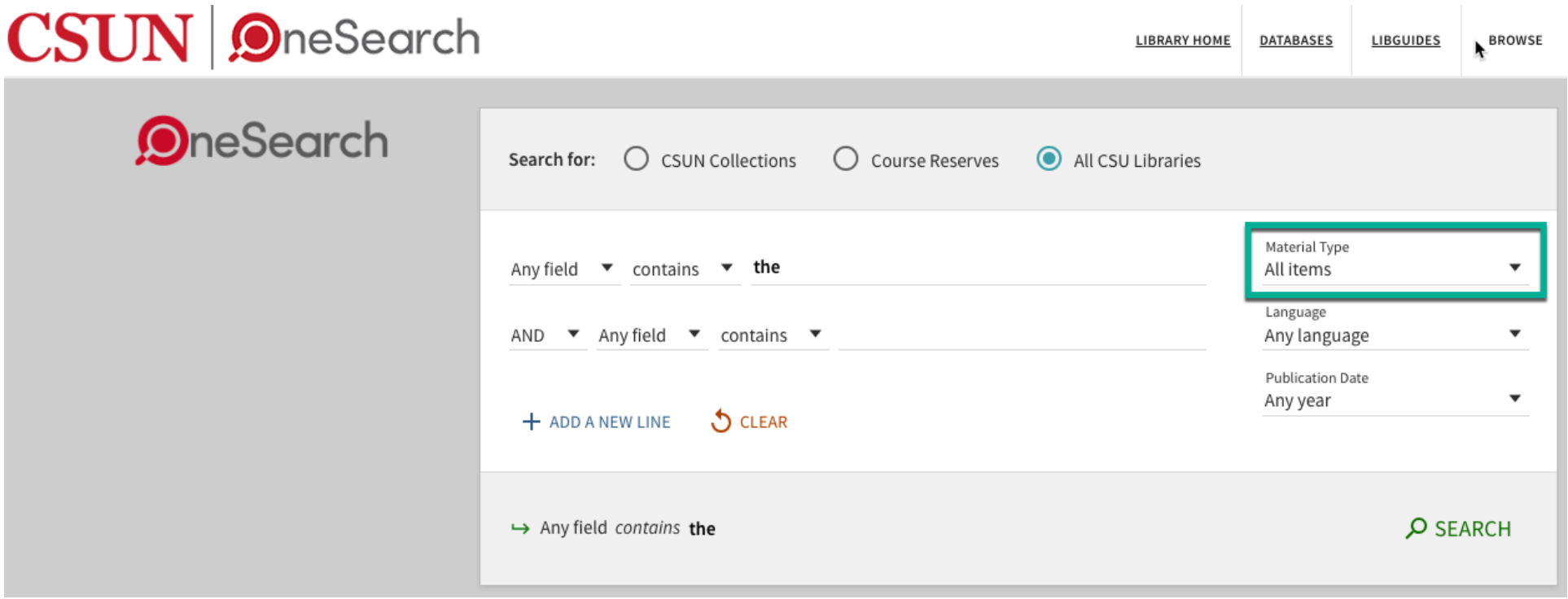
To check the status of the deployment,

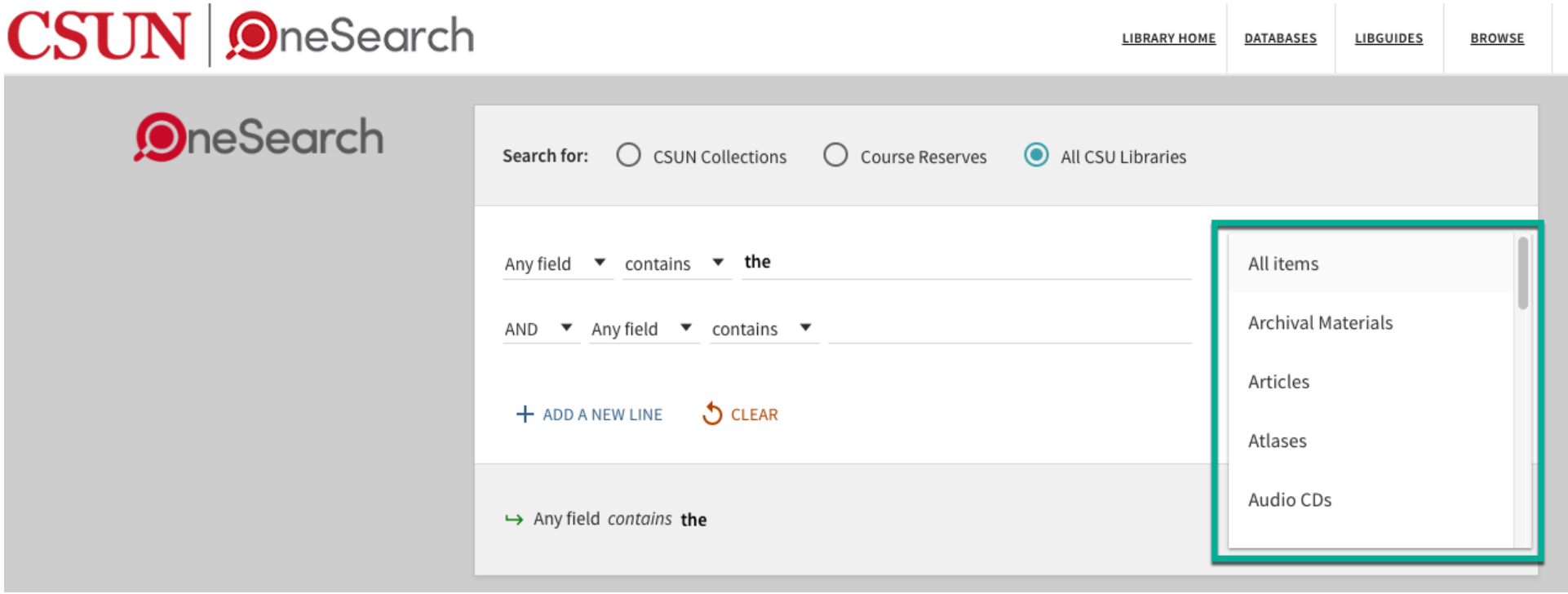
Deploy & Utitlities, Deploy Monitoring




CalState Sandbox Primo Back Office
About| Logout| Help
Primo Home > Monitor Primo Status > Deploy Monitoring
ExLibris Primo
Home
Deploy & Utilities
General
Local Data
Publishing
FE & Delivery
Search Engine
Hello mjun
Deploy Job Summary
Filter Deploy List By:
Owner
Deploy Name
Deploy Date
User Name
Deploy Id
Status
ALL
ALL
Jun 08, 2018
ALL
Search
California State University, Northridge
Views
Jun 08, 2018 19:37
mjun
bd58ee7f-e2e5-4af4-a62b-daa3fe8160bf
Running

Result


CSUN | OneSearch
LIBRARY HOME
DATABASES
LIBGUIDES
BROWSE
OneSearch
Search for:
CSUN Collections
Course Reserves
All CSU Libraries
Any field
contains
the
AND
Any field
contains
ADD A NEW LINE
CLEAR
Material Type
All items
Language
Any language
Publication Date
Any year
Any field contains the
SEARCH


CSUN | OneSearch
LIBRARY HOME
DATABASES
LIBGUIDES
BROWSE
OneSearch
Search for:
CSUN Collections
Course Reserves
All CSU Libraries
Any field
contains
the
AND
Any field
contains
ADD A NEW LINE
CLEAR
Any field contains the
All items
Archival Materials
Articles
Atlases
Audio CDs