

Primo Training 4/6/2017 - Installation V Institution, changing scopes, tabs and labels

Primo BO login for Norm Rule review - [CalState_Rules/CalState_Rules](#)

Installation – Configuration data that belongs to the whole installation (i.e. the consortium) and can be shared by all institutions in the installation, but must be configured by installation-level staff users.

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Back_Office_Guide/010Getting_Started/020Primo_Concepts,_Components,_and_Relationships

Installation

- General configuration
- Search engine processes
 - Note FRBR/Dedup in installation BO
- Full Normalization
 - Can edit all norm rule tables
 - Only view in institution
- Some code and mapping tables (For details, see sections [Code Table Configuration Restrictions](#) and [Mapping Table Configuration Restrictions](#).)
- Tools – Create X-ref, Import/Delete PNX Extensions, Export User Generated Data, and PNX Extensions Loader.

Institution –

- Data sources
- Pipes
- Scopes/Restricted delivery and search scopes
- UI changes for local in Views Configuration
- Some code and mapping tables

Home > Advanced Configuration

> Search Engine Configuration

> Institution Boost

1 - [institutions are treated equally.](#)

0.00001 - [essentially push all of the other campus results below yours](#)

Default 0.5

Primo Utilities > UI customization Package Manager

Here is the local template, the central package, and your institution template. Note you can make changes and load a new version of your institution template. So if you can't find the changes you want to make in the BO, this could be a place to look for offending label or element.

Many basic UI changes are made in Views

Ongoing Configuration > Views Configuration

> Main View

Documentation on creating scopes and tabs -

https://knowledge.exlibrisgroup.com/Primo/Knowledge_Articles/What_are_the_Institution%2C_Library%2C_Collection%2C_and_Other_scope_%22types%22%3F

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Back_Office_Guide/050Pipeline_Configuration_Wizard/050Managing_Scope_Values

> Scopes - scopes are made of data sources

01CALS_Alma - network zone

CALS-Print - CSU Print scope, used for resources sharing

01CALS_SJO - includes E, D, CR, NOT restricted

E-01CALS_SJO - electronic items

D-01CALS_SJO - digital items (probably none)

01CALS_SJO_CR - Course Reserves

01CALS_SJO_CR_RESTRICTED - restricted course reserves

> Tabs - tabs are used to create different limited search "scopes" in Primo - So, you'll likely have an Everything, Books & Media, Articles "tab"

> Tiles

>Home Page

> Basic Search

Not much to change, exclude resources types from certain tabs

> Advanced Search

Add search lines

Add material types

Add a field to Any field

See difference between regular and CR search lines

> Main Menu

Delete Browse, change top navigation labels

>Full Display

> Full Results

Add fields, move fields

Add Display Source Record link

>Brief Display

> Brief Results

Field to display in 1st line, 2nd line, 3rd line

Delimiter as a
 or whatever you want

Reorder tabs/links on the right of the full display. They can be hidden through CSS. Details and links ordered together cannot be unlinked.

> Refine my results (facets)

Make changes to the facet configuration

Change 5 to 0 to collapse facet

Labels are changed in Code Tables

Changing Labels

Primo

General >Code Tables

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Back_Office_Guide/140Code_Tables/100Code_Table_Reference

Searching Code Table

ALL, change to en_us, search for code or description

>Front End

>Facet Labels

> Full Display Labels

Display Source Record to Display MARC record

> Results Tile

Tweak My Results to Refine by

> User Tile

Guest to Sign In

> Delivery

>GetitTab1

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Alma-Primo_Integration/060Configuring_Alma%E2%80%99s_Delivery_System/020The_Primo_Get_It_Tab](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Alma-Primo_Integration/060Configuring_Alma%E2%80%99s_Delivery_System/020The_Primo_Get_It_Tab)

> Calculated Availability Text

These are labels you see in the brief results. For the CSU scopes, EL has been working on improving them, but you may want to make changes on your own too.

General > Mapping Tables

> Front End

Actions List, change names, order, disable

Alma -

Fulfillment > Fulfillment Configuration Menu > Discovery Interface Display Logic

> Display Logic Rules

> Labels

Change text labels inside Getit and Viewit areas in the full record display

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Fulfillment/080Configuring_Fulfillment/100Discovery_Interface_Display_Logic#Configuring_Service_Labels_in_the_Discovery_Interface](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Fulfillment/080Configuring_Fulfillment/100Discovery_Interface_Display_Logic#Configuring_Service_Labels_in_the_Discovery_Interface)

Fulfillment > Fulfillment Configuration Menu > Discovery Interface Display Logic > General

Electronic Services

Change Ask Us, Illiad, Resource sharing labels

Actions > Edit

Add institution custom URL to help, etc.

To learn more about setting up these areas, you should watch the ERM functional call for 4/6.