

Primo Record Format (PNX)

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Agenda

- Primo Normalized XML (PNX)
- Exercise

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PNX – DEMO

What PNX is

- What it is – Primo Normalized XML
- Where it comes from (source data + normalization rule set)

PNX Viewer in Primo Back Office

- After comparing source record, right click and 'View Source'/'View Frame Source' to see full code

PNX in Front End

- Front End (add &showPnx=true to the end of the URL)
- recommend IE (better contrast than Chrome)

PNX – DEMO

PNX Viewer

- Primo Back Office
- By record ID(s)
- By date
- PNX List (record ID, Match ID, FRBR ID, Creation and Update dates)
- View PNX (fields/sections overview)
- Compare to Source Record
- Match ID (none, dedup record, frbr record)

PNX – DEMO

PNX Sections

- Control
- Display
- Links
- Search
- Sort
- Facets
- Dedup
- FRBR
- Delivery
- Enrichment
- Ranking
- Addata
- Browse

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Exercise #3a

See the PNX Record in the Back Office (your institution)

- Log into the Primo Back Office
- Go to the PNX Viewer
- Enter in the source ID of the record
- See the PNX record and the original record

See handout for step-by-step instructions

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Converting Records into PNX

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Agenda

- Normalization Mapping Tables
- Normalization Rule Sets
- Exercise

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Normalization Mapping Tables – DEMO

Normalization Mapping Tables Overview

- Used to translate one set of codes to another
- Some are populated by default (Primo software)(customizable)
- Some are populated with information entered from other areas of the system (ILS institution codes, ILS Library Codes)(not customizable)
- List of all mapping tables potentially used (normalization rules define which mapping tables are used and how)

Primo Back Office > Ongoing Configuration > Pipe Configuration > Normalization Mapping Tables

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Normalization Rules Configuration – DEMO

Normalization rule configuration

- Using template normalization rules
- Standard changes to templates
 - May want to create a search/searchscope for data source (will also need to create corresponding scope value)
 - Non-Ex Libris ILS systems will also need Availability Enrichment configured

Managing Normalization Rules Overview

- Display template NR checkbox
- Edit, Deploy, Test options

Create a new normalization rule from template

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Normalization Rules Configuration – DEMO

PNX Section Screen

- Entry screen for normalization rules
- Summary of PNX sections for this normalization rule
- Normalization Rules set dropdown (allows you to go to different rule set)
- PNX section dropdown (different PNX areas)
- Display empty PNX fields
- Normalization Rules Set Attributes
- Normalization Rules for PNX Section

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Normalization Rules Configuration – DEMO

PNX Field Screen

- Sections of screen
- General information and settings
- Rule (source mapping)
- Create new rule/source mapping
- Testing
- Copy to another set
- Synchronize with template

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Normalization Rules Configuration – DEMO

PNX Field Screen – General Information and Settings

- Description
- Basic/Advanced option
- Action
- Enable all rules/disable all rules
- Last updated, comments and version

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Normalization Rules Configuration – DEMO

PNX Field Screen – Rules (Source Mapping)

- Rule group
- Source and Configuration XPath
- Enabled
- Conditions (logic, source, routines)
- Transformations (transformation, parameter)
- Action (add, or, merge)

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Normalization Rules Configuration – DEMO

PNX Field Screen – Create new source mapping

- How to create
- How to delete

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Normalization Rules Configuration – DEMO

How to edit an existing rule set

- Reasons for editing a rule set
- Walk through editing an existing field and testing it (editing characters in #2 rule group)

How to add a new rule to an existing set

- Reasons for adding a new rule to a rule set
- Walk through adding a rule to an existing set and testing (adding subtitle from 245c)

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Normalization Rules Configuration – DEMO

PNX Field Screen – Testing

- Select owner and type of source record to test with
- Select record (can also edit this record if needed)
- Test record
- New window/tab opens with PNX result on left, and the original record on the right

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Normalization Rules Configuration – DEMO

Copy to another set

- Only available if you have multiple normalization rules for your institution

Synchronize with template

- Applies only to rules on screen, not the entire normalization rule set

Save and deploy

- After testing, Save, Deploy
- Deploying makes the rule set available to pipes

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Normalization Rules Configuration – DEMO

How to add a new rule set

- Reasons for adding a new rule set (local fields)
- Different types of local fields (display, links, search, facets)
- Adding a new rule set (display empty fields, use local field)

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Exercise #3b

Create normalization rule set, adjust, and renormalize data

- Create a new normalization rule set from template
- Make changes to a normalization rule
- Create a new renormalization pipe (No Harvest) using new rule set
- Deploy
- Renormalize data

See handout for step-by-step instructions



Questions?

<http://knowledge.exlibrisgroup.com>

