Introductions and Overview

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Introductions

Us
• Jean Cabaup
• Mike Pruzan

You
• What’s your current level of exposure/ experience with Primo?
• What do you hope to get out of this training?
Introductions

Basecamp
- Your login.xlsx - Username and password for your institution
- Primo Exercises – Hands-on exercises for this training

Primo Certification Exam
- You will have one week to complete
- Information to access exam posted on Basecamp by the end of training

Overview

Day One
- Primo Back Office
- How data is prepared for discovery

Day Two
- Primo UX and Primo Central
- How the Primo UI is configured
- How the Primo UI is customized
Primo Back Office

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Primo Back Office

- Administrative Structure
- Back Office Overview
- Exercise
Primo Back Office

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- Exercise

Administrative Structure
Administrative Structure

- Shared ILS
- Separate E-resources

Libraries in different locations

One main library

Installation Level

Installation
**Installation Characteristics**

**Installation Level**
- Contains software application
- Indexing
- Server monitoring
- Data sharing (if needed)
- Creation of institutions

**What this means to you**
- Hosted environment – shared installation
- Dedicated environment – their own installation

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**Institution Characteristics**

**Institution Level**
- Data source configuration
- Data loading processes
- Link resolver
- Primo Central
- ILS & Digital Repository Base URLs
- IPs and Authentication

**What this means to you**
- Customer’s organization may need one or more Primo institutions based on their internal structure
Library Characteristics

Installation

Library Level
- Physical resources
- Library name or code in MARC data

What this means to you
- Libraries used for delivery
- Views used for branding and customizations

Primo Back Office
- Administrative Structure
- Back Office Overview
- Exercise
Login – DEMO

Primo February 2017 Release: Birthday of Mo Yan
Won the 2012 Nobel Prize in Literature for work that "with hallucinatory realism merges folk tales, history and the contemporary."

To review system status, maintenance announcements: http://status.exlibrisgroup.com/

Primo Back Office Introduction – DEMO

• Navigation Area
• Monitoring & Maintenance
• Configuration & Management Wizards
• Dashboard and Deploy All
Access Levels and Institution List – DEMO

Super Admin Level
- See and edit all institutions
- Create new institutions
- Dedicated environments (consortia)

Admin Level
- See and edit only institutions available to
- View default institution
- Multi-tenant environments

Primo Back Office > Ongoing Configuration > Institution Wizard

Editing Institutions – page 1 – DEMO

Editing Institutions
- General Institution Attributes
  - Institution Code
  - Institution Name
  - Description
  - Associated Alma, MetaLib, SFX, Primo Central information (if it exists)

Delivery Base URLs
- ILS Base URL
- Link resolver
- Alma Services page
- Digital Repositories

Libraries Configuration
- Add libraries here
- Will want to add new libraries here as part of ongoing maintenance (add in Alma, add here)
Editing Institutions

• IP Configurations
  • Used to identify on campus/off campus
  • Can be used to determine view if more than one is configured in Primo (consortium)

Deploying

• Mechanism in Primo used to activate changes

Primo Back Office

• Administrative Structure
• Back Office Overview
• Exercise
Exercise #1

Log into Primo Back Office
- Go to URL
- Type in username and password

Edit the Institution
- Go to Ongoing Configurations > Institution Wizard
- Edit your institution
- Fill in selected fields
- Create Libraries
- Deploy

See handout for step-by-step instructions