



Introductions and Overview

Jean Cabaup | Training Consultant
Mike Pruzan | Senior Knowledge Management Specialist

ExLibris
a ProQuest Company

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

Jean Cabaup | Training Consultant
Mike Pruzan | Senior Knowledge Management Specialist

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Primo Back Office

- Administrative Structure
- Back Office Overview
- Exercise

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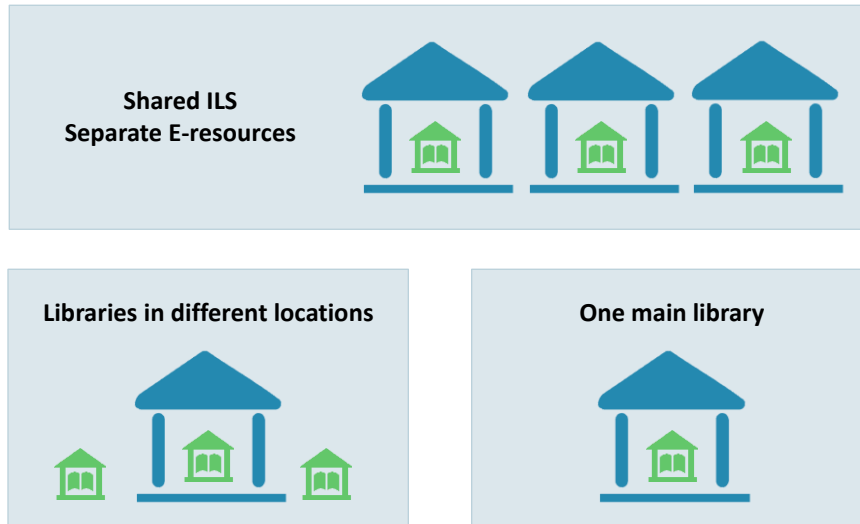
Primo Back Office

- Administrative Structure
- Back Office Overview
- Exercise

Administrative Structure



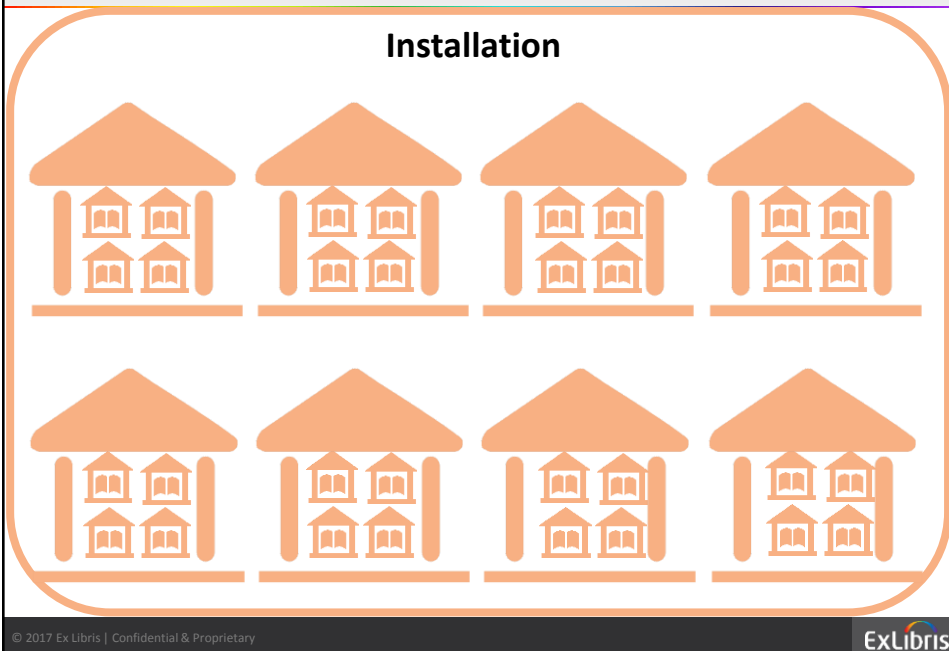
Administrative Structure



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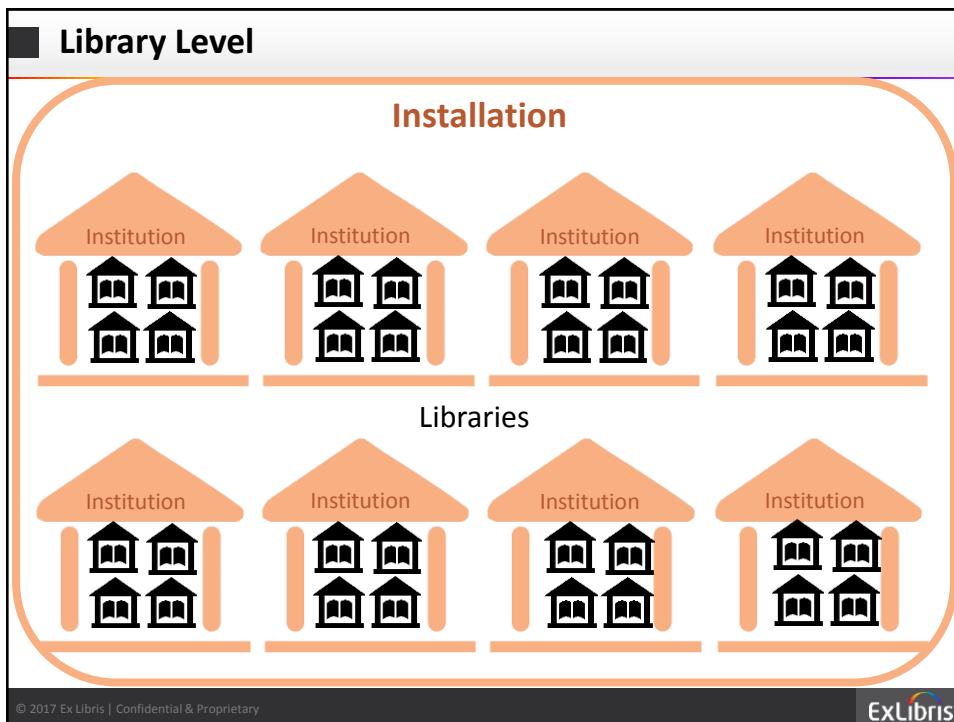
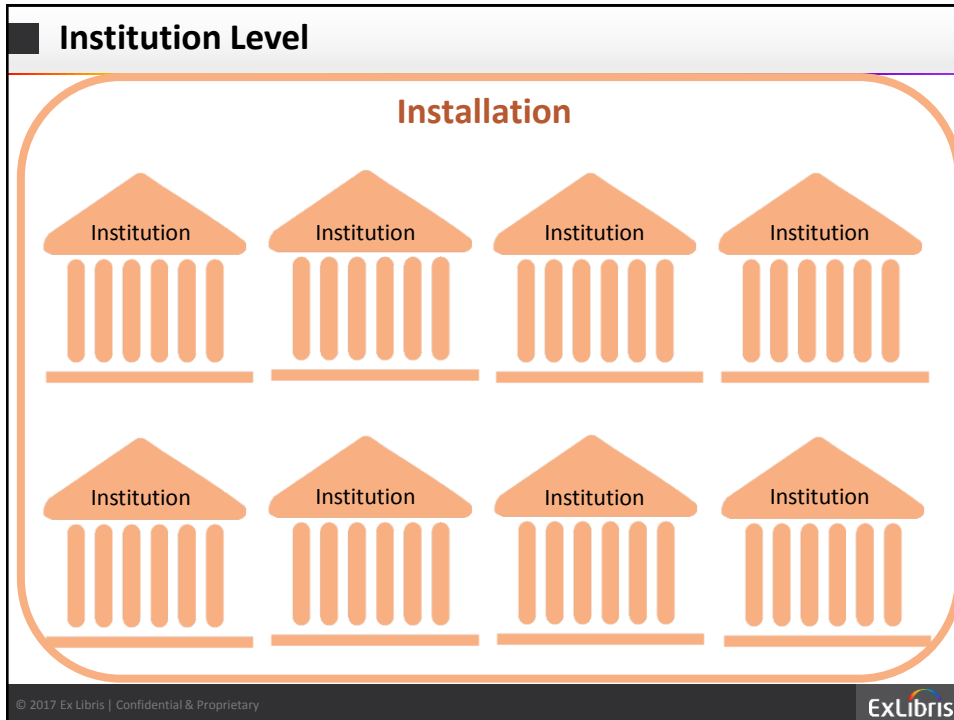
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Installation Level



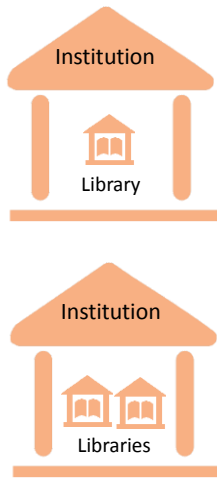
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Installation Characteristics

Installation



Installation Level

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

What this means to you

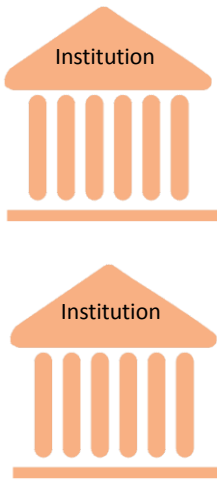
- Hosted environment – shared installation
- Dedicated environment – their own installation

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Institution Characteristics

Installation



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

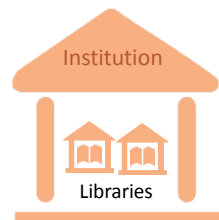
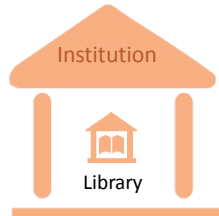
- Customer's organization may need one or more Primo institutions based on their internal structure

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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

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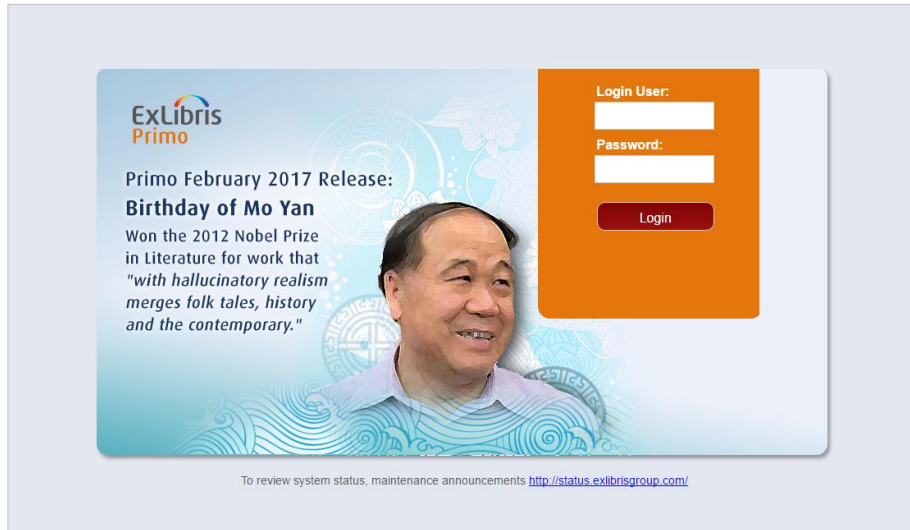
Primo Back Office

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Login – DEMO



The screenshot shows the ExLibris Primo login interface. On the left, there is a promotional banner for the 'Primo February 2017 Release' featuring a portrait of Mo Yan and text about his Nobel Prize win. On the right, there is an orange login box with fields for 'Login User:' and 'Password:', and a 'Login' button. Below the banner, a small link provides information on how to review system status.

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Primo

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."*

Login User:

Password:

Login

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

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Primo Back Office Introduction – DEMO

- Navigation Area
- Monitoring & Maintenance
- Configuration & Management Wizards
- Dashboard and Deploy All

Primo Back Office

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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

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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)

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Editing Institutions – page 2 – DEMO

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

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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