




Customizing the UX

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ExLibris
a ProQuest Company



Agenda

- Home Page
- UI Customization Package Manager
- CSS
- Images
- HTML
- Exercise

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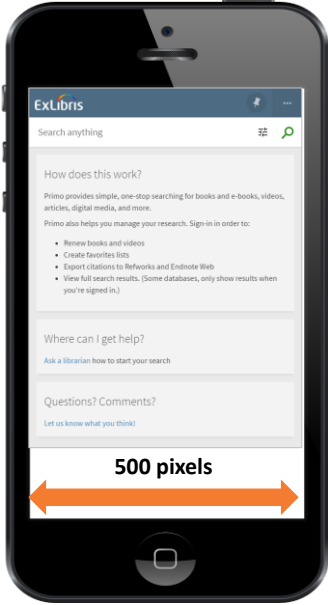
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Home Page – Default

The screenshot shows the default ExLibris home page. At the top is a dark blue header with the ExLibris logo on the left. To the right of the logo are four buttons: 'LIBRARY SEARCH', 'A-Z', 'CITATION LINKER', and a 'Guest' button with a user icon and the text 'Guest ENGLISH'. Below the header is a large white search bar with the placeholder text 'Search anything' and a magnifying glass icon on the right. To the right of the search bar is a link for 'ADVANCED SEARCH'. Below the search bar, the page is divided into two main columns. The left column has a section titled 'How does this work?' which explains that Primo provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more. It also mentions that Primo helps manage research and lists four actions: 'Renew books and videos', 'Create favorites lists', 'Export citations to Refworks and Endnote Web', and 'View full search results. (Some databases, only show results when you're signed in.)'. The right column has a section titled 'Where can I get help?' with a link 'Ask a librarian how to start your search'. Below this is another section titled 'Questions? Comments?' with a link 'Let us know what you think!'.


Home Page – Mobile



500 pixels

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Customizations Manager

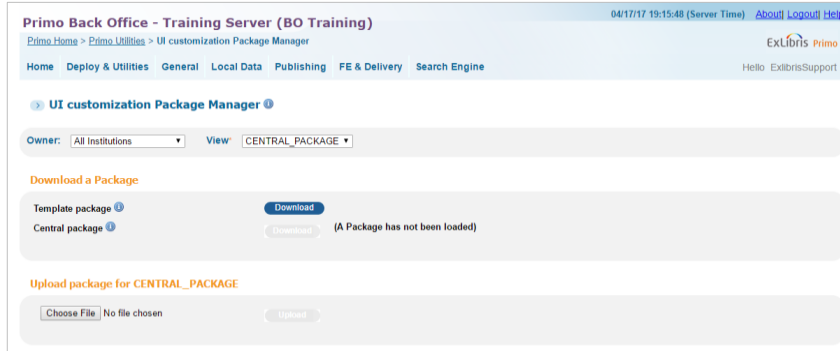
Classic vs New UX customization

- Classic still uses File Uploader to manage CSS, images & HTML
- New UX uses UI Customization Package Manager

Accessing the Customizations Manager

- Go to Primo Back Office > Deploy & Utilities > Customization Manager
- General workflow
- Select Owner and View
 - Download Template Package
 - Unzip and rename using View code
 - Make adjustments to files
 - Zip and upload package
 - Deploy

Customizations Manager – DEMO



The screenshot shows the 'UI customization Package Manager' interface within the Primo Back Office. The page title is 'Primo Back Office - Training Server (BO Training)'. The breadcrumb trail is 'Primo Home > Primo Utilities > UI customization Package Manager'. The navigation bar includes links for Home, Deploy & Utilities, General, Local Data, Publishing, FE & Delivery, and Search Engine. The user is logged in as 'Hello ExLibrisSupport'. The main content area has a header 'UI customization Package Manager' with a sub-header 'Owner: All Institutions' and a 'View' dropdown set to 'CENTRAL_PACKAGE'. Below this, there is a 'Download a Package' section with two options: 'Template package' (with a 'Download' button) and 'Central package' (with a 'Download' button and a note '(A Package has not been loaded)'). At the bottom, there is an 'Upload package for CENTRAL_PACKAGE' section with a 'Choose File' button and an 'Upload' button.

- Go to UI Customization Package Manager
- Select Owner and View
- Download Template Package
- Unzip and rename using View code
- Make adjustments to files
- Zip and upload package



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- Home Page
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- **CSS**
- Images
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CSS

Things to remember about custom1.css

- Keep this file name!
- Used in conjunction with a default CSS
- Overrides any other customized css files that may exist
- Use Chrome DevTools or similar app to identify CSS
- Advanced: it's possible to use GULP to customize CSS

CSS – DEMO

Demonstrate

- Use Chrome DevTools to pinpoint code
- Add sample code below to custom1.css
- Save file in css folder

Sample code to change search bar:

```
.prm-primary-bg.prm-hue1, prm-journals-search-bar.prm-hue1, prm-search-  
bar.prm-hue1, prm-spinner.prm-hue1.overlay-cover.light-on-dark:after, prm-  
topbar .top-nav-bar {  
    background-color: black;  
}  
prm-search-bar {  
    background-color: dimgray;  
}
```



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Images

Things to remember about images

- Files must use existing filenames
 - library-logo.png
 - favicon.ico
 - icon_article.png; icon_book.png, etc
- Must be png format
- Recommended sizes
 - Logo: 35x100 pixels
 - Favicon: 50x50 pixels
 - Resource type icons: 60x88 pixels

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Images – DEMO

Demonstrate

- Save and rename a logo into library-logo.png (if it's a gif or jpeg)
- Add images to the img folder

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HTML

Things to remember about HTML

- Classic used 'tiles' and multiple HTML files for homepage
- New UI uses only one for homepage
- Keep this file name!
- home_en_US.html is recognized as the English version
 - Used in conjunction with language functionality
 - Possible to implement multiple languages

HTML – DEMO

Demonstrate

- Make a change to the HTML file
- Save new version in the html folder



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Customizations Manager – DEMO

The screenshot shows the 'UI customization Package Manager' interface. At the top, it says 'Primo Back Office - Training Server (BO Training)' with a timestamp '04/17/17 19:15:48 (Server Time)' and links for 'About', 'Logout', and 'Help'. Below this is a breadcrumb trail: 'Primo Home > Primo Utilities > UI customization Package Manager'. A navigation bar includes links for 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. The user is logged in as 'Hello ExLibrisSupport'. The main section is titled 'UI customization Package Manager' and features two dropdown menus: 'Owner' set to 'All Institutions' and 'View' set to 'CENTRAL_PACKAGE'. Under 'Download a Package', there are two options: 'Template package' with a 'Download' button, and 'Central package' with a 'Download' button and a note '(A Package has not been loaded)'. At the bottom, there is an 'Upload package for CENTRAL_PACKAGE' section with a 'Choose File' button and a 'Upload' button.

- Go to UI Customization Package Manager
- Select Owner and View
- Download Template Package
- Unzip and rename using View code
- Make adjustments to files
- **Zip and upload package**
- **Deploy**

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Exercise #8

Use the Customizations Manager to

- Upload a new logo
- Change the color of the search bar
- Adjust the content on the home page

Use the following code to access the new Primo UI

<http://pstraining.hosted.exlibrisgroup.com/primo-explore/search?vid=YOURVIEWCODE>

Where 'YOURVIEWCODE' is replaced with your view code

e.g. <http://pstraining.hosted.exlibrisgroup.com/primo-explore/search?vid=01HERON>

Explore the default UX

You can also explore <http://pstraining.hosted.exlibrisgroup.com/primo-explore/search?vid=TRAINALMA>

See handout for step-by-step instructions

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Questions?

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Thank you!

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