

## Configuring Primo Record Display and Search

Adding local fields to your Primo interface

Maxine Pavnica | Primo Support Analyst  
Paul McBride | Senior Primo Support Analyst

**ExLibris**  
a ProQuest Company

### Introductions

- Maxine Pavnica

Maxine joined the North American Support Team in 2013 and specializes in Primo configuration. She received her Masters of Library and Information Science from the University of Illinois Urbana-Champaign.

- Paul McBride

Paul joined the North American Primo Support Team in 2010. Prior to joining Ex Libris, he spent ten years doing distributed application development and support. Paul is an SME on Primo's APIs.

## Objectives and Target Audience

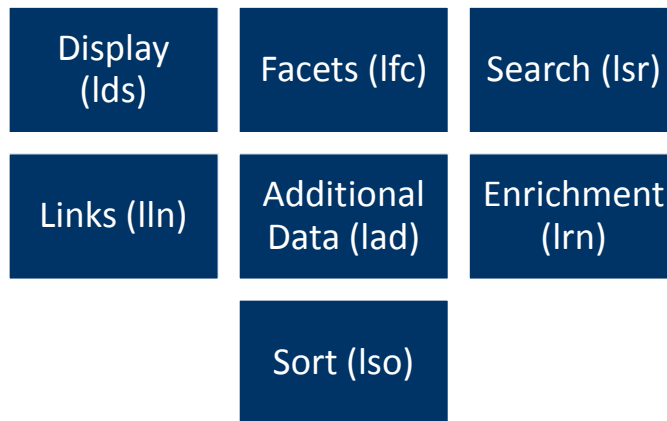
- **Brief Session Description:** This session will cover frequently asked questions about configuring Primo PNX records. We will take a goal-oriented approach to discuss the modification of Primo's normalization rules. Objectives include creating facets, making fields searchable, and making fields visible to your users. Make the most of your data by leveraging the power of the PNX!
- **Session Objective(s)**
  - By the end of this sessions you will know, understand and/or be able to:
    - Understand the structure of a Primo PNX record
    - Understand the basics of normalization rules
    - Configure normalization rules to create facets, searchable fields, and more.
- **Session Target Audience:**
  - New and Experienced Customers

## Agenda

- 1 Introduction
- 2 Adding a local Facet
- 3 Adding a local display field
- 4 Adding a local Search field

## Introduction: Local Fields in the PNX

In addition to Primo's out-of-the-box fields, you can define a maximum of 50 local fields in the following PNX sections:



## Introduction: Local Fields in the PNX

### Advantages of Local Fields

- Accommodate the specific research needs of users at your institution
- Offers granularity not provided by out-of-the-box fields
- Tailor your Primo to your local collection

Can an existing field do the job? Why not?



## Types of Facets

### Dynamic Facets

- Values for each facet category are derived from values in the facets section of the PNX.
- Generally, facets are dynamic by default.

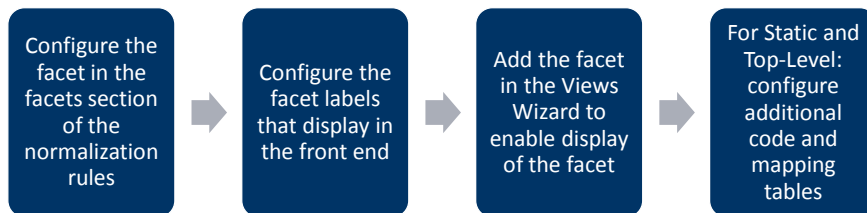
### Static Facets

- Values for each facet category based on a pre-defined list, stored in a mapping table.
- Require additional configuration in code and mapping tables

### Top-Level Facets

- Display the in the Show Only section of the brief results page
- Top-level facets appear even if results are found in only one category (such as Available in the library)

## General Steps for Facet Creation



## Adding a Dynamic Facet

Dynamic Facets can have random values, but should be repeatable within a collection

Example: Publisher, Author, Topic



## Walkthrough: adding a facet for Publisher

- Publisher should be a dynamic facet because it contains repeating information, but not a “known” list
- First Step: identify a PNX element or field(s) in the source records that contains publisher information

For instance:

- display/publisher (an existing PNX field)
- MARC 260 b

- The specific source field does not matter as long as the data in this field is consistent

## Adding a Normalization Rule

This rule uses MARC 260 b as a source and copies the value into the facets/lfc01 field

```

<facets>
  <language>eng</language>
  <creationdate>2009</creationdate>
  <topic>Neurosciences-History</topic>
  <topic>Neurosciences and the arts. Y</topic>
  <topic>Neuroscientists. Y</topic>
  <topic>Arts and neurosciences NK</topic>
  <prefilter>books</prefilter>
  <rsctype>books</rsctype>
  <creatorcontrib>Gross, C</creatorcontrib>
  <lfc01>Cambridge, Mass. : MIT Press</lfc01>
  <lfc07>WSS$IHITESHORE<A> hole in the head :</lfc07>
  <lfc25>Gross, Charles G. WSS$IHITESHORE</lfc25>
  <lfc25>Gross, Charles G., WSS$IHITESHORE</lfc25>
  <lfc50>Neurosciences WSS$IHITESHORE</lfc50>
  <lfc50>Neurosciences and the arts. WSS$IHITESHORE</lfc50>
  <lfc50>Neuroscientists. WSS$IHITESHORE</lfc50>
  <lfc50>Arts and neurosciences WSS$IHITESHORE</lfc50>
  <frbgroupid>2054908</frbgroupid>
  <frbrtype>6</frbrtype>
</facets>
  
```

- Save and Deploy the Rule Set
- Run a No-Harvest (Renorm) pipe to update the records
- Wait for Indexing and Hotswap to complete

## Editing the Facet Label

### Code Table: Facet Labels

- Changes the label that displays in the front end

Enabled	Code	Description
<input checked="" type="checkbox"/>	default:facets:facet:facet_local1	Publisher
<input checked="" type="checkbox"/>	default:facets:facet:facet_librarygroupid	Library (other institutions)
<input checked="" type="checkbox"/>	default:facets:facet:facet_library_otherinstitutions	Library (other institutions)
<input checked="" type="checkbox"/>	default:facets:facet:facet_doc	Classification DDC

### Code Table: Facet Code Field

- Changes the label that displays in the Back Office Views Wizard

Enabled	Field Names	Field Codes
<input checked="" type="checkbox"/>	facet_local1	Publisher
<input checked="" type="checkbox"/>	facet_local47	Local Field47
<input checked="" type="checkbox"/>	facet_local8	Local Field8
<input checked="" type="checkbox"/>	facet_local33	Local Field33
<input checked="" type="checkbox"/>	facet_library	Library

## View Configuration

- Adding the new facet in the Tiles Configuration > Brief Display page of the Views Wizard “enables” it and makes it visible in the front end.
- New facet will appear after deploying the view

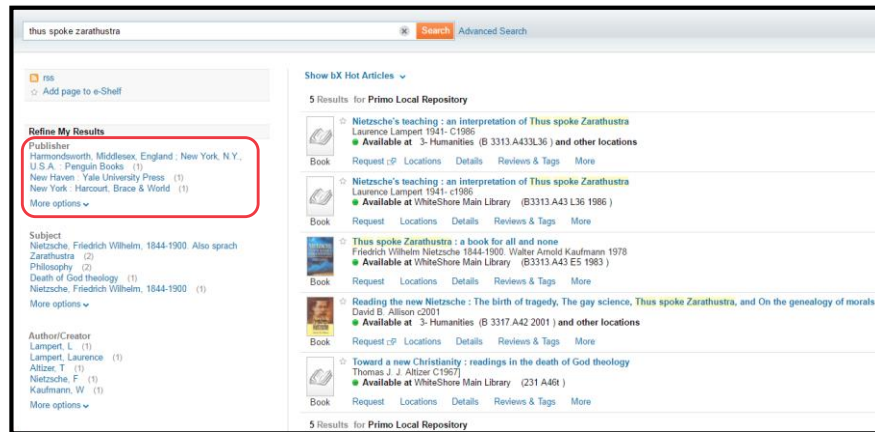
Type	Items to Display	Sort
Resource Type	5	by_size
Topic	5	by_size
Creator	5	by_size
Creation Date	5	none
Library	5	by_size
Collection	5	by_size
Language	5	by_size
Journal Title	5	alpha_numeric

Add new Facet to tile    Facet Type: Publisher    **Create**



Views Wizard > Tiles Configuration > Brief Display > Refine My Results (Facets)

## Facet Appears in Front End



## Adding A Static Facet

Static Facets are best when working with a fixed set of possible values

Example: Resource Type, Language, Library

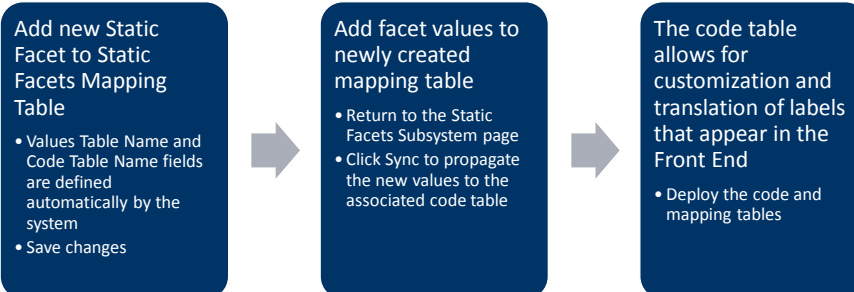




## Adding a Static Facet for Video Formats

- Video Formats should be a static facet because the media formats are a known, finite list
- Library has a large collection of audiovisual materials of various mediums: DVD, Blu-ray, VHS, Videodisc, etc.
- Helps users quickly identify materials based on format

## Mapping and Code Table Configuration



## Mapping and Code Table Configuration

### Mapping Table: Static Facets

- Syncing creates code and mapping tables

### Mapping Table: local field values table

- Table create by the system, values updated manually

### Code Table: local field values table

- Table generated by the system, values copied from mapping table

The screenshots show the configuration interface for Mapping Tables and Code Tables. The top-left screenshot shows the 'Mapping Tables' configuration page with a table of Mapping Table Rows. The top-right screenshot shows the 'Mapping Tables' configuration page with a table of Mapping Table Rows. The bottom screenshot shows the 'Code Tables' configuration page with a table of Code Table Rows.

Enabled	Static Facet Name*	Code Table Name	Values Table Name
<input checked="" type="checkbox"/>	File Size	facet_static_values_codes	facet_static_values
<input checked="" type="checkbox"/>	Play Bar	facet_static_values_codes	facet_static_values
<input checked="" type="checkbox"/>	Release Type	facet_static_values_codes	facet_static_values
<input checked="" type="checkbox"/>	Top Level	facet_static_values_codes	facet_static_values
<input checked="" type="checkbox"/>	Language	facet_static_values_codes	facet_static_values
<input checked="" type="checkbox"/>	Video Format	facet_static_values_codes	facet_static_values

Enabled	Value Name	Value*
<input checked="" type="checkbox"/>	VHS	Video (VHS)
<input checked="" type="checkbox"/>	DVD	Video (DVD)
<input checked="" type="checkbox"/>	Blu-ray	Video (Blu-ray)
<input checked="" type="checkbox"/>	Videodisc	Video (Videodisc)

Enabled	Description	Code	Language
<input checked="" type="checkbox"/>	default facets facet_facet_video (VHS)	VHS	en_US
<input checked="" type="checkbox"/>	default facets facet_facet_video (DVD)	DVD	en_US
<input checked="" type="checkbox"/>	default facets facet_facet_video (Blu-ray)	Blu-ray	en_US
<input checked="" type="checkbox"/>	default facets facet_facet_video (Videodisc)	Videodisc	en_US

## Normalization Rule Configuration

- For this example, we use MARC field 007 position 4.
- Normalization rule will use the type\_007\_4 mapping table to map this value to a code
- As with the static facet, save and deploy normalization rule, run the no-harvest pipe, and add the facet in the Views Wizard.

The screenshot shows the 'Rule group' configuration page. The 'Rule group' is 'facets\_ifc02'. The 'Source' is 'MARC'. The 'Field' is '007'. The 'Ind1' is empty. The 'Ind2' is empty. The 'Subfield' is 'Include'. The 'Enabled' checkbox is checked. The 'Conditions' section shows 'No conditions Specified'. The 'Transformations' section shows two transformations: 'Take substring' with parameter '4@@1' and 'Use mapping table' with parameter 'type\_007\_4'. The 'Behavior' is 'OR'.

## Adding a Top-Level Facet

- Top-level facets are static facets that display in the Show only and Refine My Results sections on the Brief Results page
- Out of the box values: Full Text Online, Available in the library, Peer-reviewed Journals



## Walkthrough: Top-Level Facet for Physical Items

- Instead of creating a new local field, add the normalization rule to Facets/Top Level
- Example: top-level facet for physical items
- This rule uses an existing PNX field, delivery/delcategory and checks if the record is a physical item

The screenshot shows the configuration for a rule group named 'Facets\_toplevel'. The 'Source' is set to 'PNX' with the value 'delivery/delcategory'. The 'Conditions' section is expanded, showing 'Condition 1 - Logic' set to 'True'. Below this, 'Condition 1 - Source' is set to 'PNX' with the value 'delivery/delcategory'. The 'Success If' dropdown is set to 'Match Any'. The 'Condition 1 - Routines' section is also expanded, showing a routine 'Check string equals string' with a parameter 'Physical item'. The 'Transformations' section is expanded, showing a transformation 'Write constant' with a parameter 'Physical item' and an action 'ADD'.



## Local Display Fields

- Local display fields are designed to display information that falls outside the scope of the out-of-the-box display fields.
- Example: alternate title, local notes



## Walkthrough: adding a display field for General Notes

- A simple normalization rule copies the 500 a field and removes punctuation from the end.
- Save and deploy the rule set, run a no-harvest pipe to update the records

Normalization Rules for field **lds01** in PNX Section **display** in Normalization rules set **WHITESHORE\_VOYAGER**

Description:  [Advanced](#)

Action: **ADD** [Enable all rules](#) [Disable all rules](#)

Last Updated By: ExLibrisSupport **At:** 2016-03-28 13:44:57.0

General Note

Comments:

Version:

[Go to bottom of page](#)

Type	Field	Ind1	Ind2	Subfield
MARC	500			Include a

1 Transformation Parameter

Copy As Is

Remove characters from the end

## Local Display Fields

### Code Table: Front End Display Fields

- Configure a label for the local field

### Views Wizard Configuration

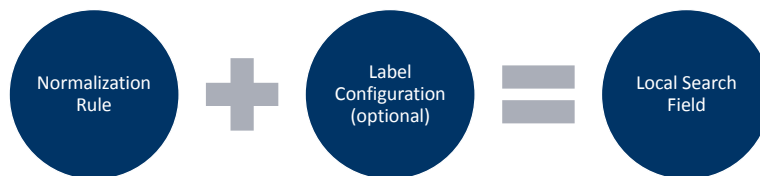
- To add the field to the details tab, add it to the Full Display
- To add the field to the brief display (below the record title) add it to the Brief Results

The image shows two overlapping screenshots of the ExLibris configuration interface. The top screenshot is titled 'Code Tables' and shows a table with columns 'Enabled', 'Field', and 'Default Value'. The 'Field' column lists various metadata fields like 'Vernacular title', 'Title', 'Creator : Contributor', 'Subject', 'Is Part Of', 'Description', 'Relation', 'Publisher', 'Creation Date', 'Format', and 'Language'. The bottom screenshot is titled 'Views Wizard Configuration' and shows a 'Field' selection dialog for 'Field to display in 1st line of the brief results'. It lists 'Vernacular title' and 'Title' as options. At the bottom of this dialog, there is a 'Create a new field to Items Title' section with a 'Field:' dropdown set to 'Note' and a 'Create' button.

## Local Search fields

## Local Search Fields

- Local search fields provide the capability to search for information that falls outside the scope of the out-of-the-box search fields.
- Example: publisher, call number, OCLC number



## Adding a Search Field for Call Number

- Normalization rule copies 949 d from the source record
- As always, save and deploy the rule set, run a no-harvest pipe to update the records
- Since this is a search field only, no label configuration needed (unless adding the search field to the Basic or Advanced Search Tile dropdowns)
- After indexing completes, records are searchable by call number

Normalization Rules for field 949d in PNX Section search in Normalization rules set WHITESHOPE\_VOYAGER

Description:  [Basic](#)

[Enable all rules/Disable all rules](#)

Last Updated By: ExLibrisSupport At: 2016-03-30 12:02:13.0

Call Number

Comments:

Version: 1

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Rule group: search\_949d?

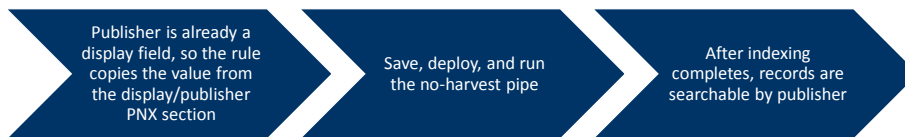
Source	Type	Field	Ind1	Ind2	Subfield	Include	Exclude	Enabled
MARC		949				Include	d	<input checked="" type="checkbox"/>

Conditions: [No conditions Specified](#)

Transformations: [Add Transformation](#)

Transformation	Parameter	Behavior	Action
Copy As Is			OR

## Adding a Search Field for Publisher



Rule group: search\_jur01

Type: [ ] Value: [ ]

Source: PNX [v] Value: display/publisher [v] Enabled: ☒

Conditions: [ ] No conditions Specified

Transformations: [ ]

Transformation: [ ] Parameter: [ ]

Behavior: [ ]

Action: ADD [v]

## Adding a Search Field to the Advanced Search

### Code table: Advanced Index Fields

- Add label for local search field
- Deploy code table

### View Configuration

- Views Wizard > Tiles Configuration > Home Page > Advanced Search
- Edit complex search lines to include new search field value
- Deploy the view

Enabled	Field Code	Field Name	Language	Display Order
<input checked="" type="checkbox"/>	jur01		en_US	31
<input checked="" type="checkbox"/>	jur09	jur09	en_US	26
<input checked="" type="checkbox"/>	jur04	jur04	en_US	23
<input checked="" type="checkbox"/>	jur01	Publisher	en_US	27
<input checked="" type="checkbox"/>	jur05	jur05	en_US	28
<input checked="" type="checkbox"/>	jur06	jur06	en_US	24
<input checked="" type="checkbox"/>	jur02	jur02	en_US	30
<input checked="" type="checkbox"/>	jur08	jur08	en_US	

View: TS Title: Advanced Search

Interface Language: English [v]

Search Target Fields of Advanced Search title:

Field	Default
Any	<input checked="" type="radio"/>
In the title	<input type="radio"/>
as author/creator	<input type="radio"/>
In subject	<input type="radio"/>
Publisher	<input type="radio"/>

Create a new Search Field Search Field Value: ORCID ID [v] Create



## Front End Functionality

Publisher appears in Advanced Search Dropdown and searches the newly-defined local field exclusively

The screenshot displays the ExLibris Advanced Search interface. The search criteria are set to 'Publisher' contains 'biomedical press' AND 'Any' contains 'Any'. The search results show the book 'Trends in neurosciences (Reference ed.)' by 'Cambridge, UK : Elsevier/North-Holland Biomedical Press'. The XML record for this item is displayed below the details.

```
<rsrctype>journal</rsrctype>
<creationdate>1978</creationdate>
<creationdate>1999</creationdate>
<startdate>19780101</startdate>
<enddate>19991231</enddate>
<addtitle>Trends in neurosciences (Monthly)</addtitle>
<searchscope>WHITESHORE_VOYAGER</searchscope>
<scope>WHITESHORE_VOYAGER</scope>
<alttitle>Trends in neurosciences (Reference ed.)</alttitle>
<alttitle>TINS</alttitle>
<lrs01>
  Cambridge, UK : Elsevier/North-Holland Biomedical Press
</lrs01>
<lrs07>RC321 .T742</lrs07>
</search>
```

## Next Steps and Support Resources

- Customer Knowledge Center guides and articles
  - [Adding a Facet for Video Formats](#)
  - [Adding a Searchable Field](#)
  - [How To add a searchable resource type to Primo](#)
  - [New Top level facet is not created](#)
- Additional support resources within the ExLibris Ecosystem:
  - [Idea Exchange](#)
  - System Status Pages: [Single Tenant ENV](#) / [Multi-Tenant ENV](#)
  - [Developer Network](#)
- [Technical Seminar Presentations](#)  
(located in the Cross-Product section of the CKC)

## Q &amp; A

## Any Questions?



### Session Survey Evaluation

Please use the following link

<https://www.surveymonkey.com/r/techsem2017>

to provide feedback on your sessions.

