New UI Cookbook

Customizing the New Primo UI

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Introductions

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Objectives and Target Audience

- Brief Session Description:

This session will cover strategies and methods to assist with customizing the New Primo UI. Included in this session will be best practices, code examples and hands on exercises that focus on customizing the new Primo UI interface. It is recommended that participants come to the session with a laptop in order to follow along with the hands on exercises.
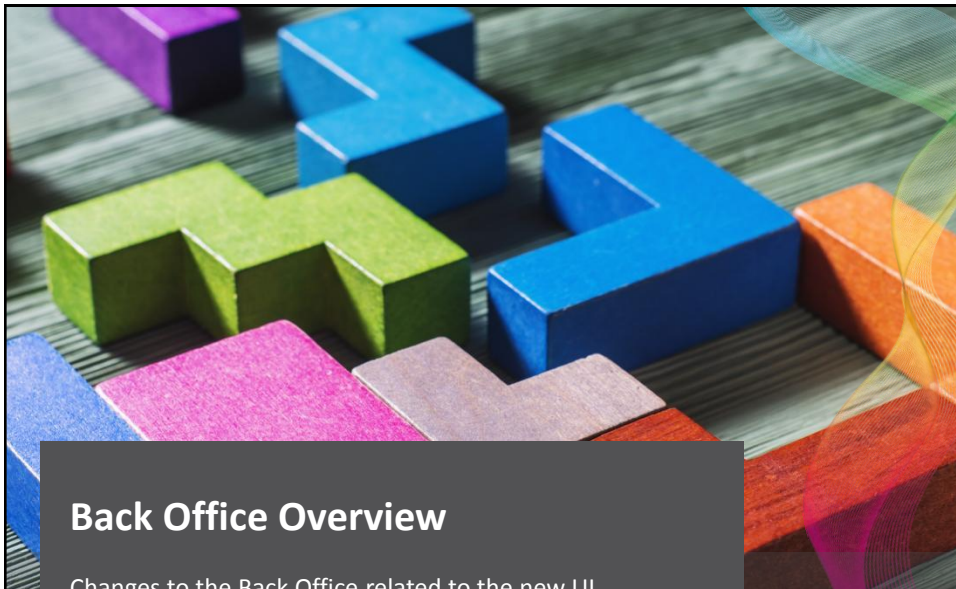
- Session Objective(s)
  - By the end of this sessions you will know, understand and/or be able to:
    - Upload and Apply a Customization Package Using the Primo Back Office
    - Learn about new changes in the Primo Back Office Relevant to the New UI
    - Learn how to use the Gulp Environment to test changes locally

- Session Target Audience:
  - All customers, both new and experienced
  - Systems and Web Librarians
  - Administrators
  - Developers

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Agenda

1   **Back Office Overview**

2   **The Customization Package**

3   **Using the Gulp Environment**

4   **Helpful Tips**

5   **Next Steps, Support Resources and Survey**

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Back Office Overview

Changes to the Back Office related to the new UI

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Back Office activation for the New Primo UI

- To direct users to the New UI, it has to be activated in the BO
- New UI can be activated per view by going to: Primo Home > Ongoing Configuration Wizards > Institution Wizard > Edit

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BO features not in use by the New UI

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Views Wizard

Ongoing Configuration Wizard > Views Wizard > Edit View Attributes

- Session timeout URL
  Home page will be always displayed after the a timeout

- Layout Set – included with the Customization Package

- CSS and Mobile CSS - controlled via the CSS in customization package

Layout Set:	customized layout ▾	Edit
CSS:	Natalia's CSS ▾	
Mobile CSS:	Natalia's mobile CSS ▾	
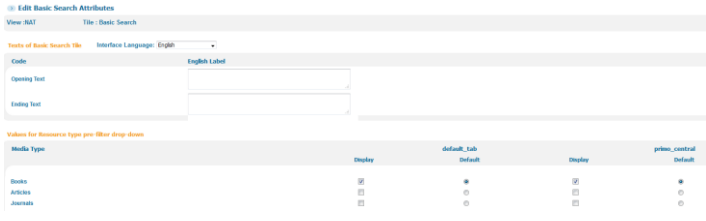
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Basic Search Tile
Views Wizard > Tiles Configuration > Edit Basic Search Attributes

• Media Type pre-filter drop-down

• Search operators
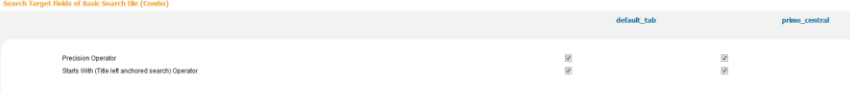
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Basic Search Tile
Views Wizard > Tiles Configuration > Edit Basic Search Attributes

• Search Target Fields

For the New UI, Resource type pre-filter drop-down, Search Operators and Search Target Fields of Basic Search tile, only available in the Advanced search

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Brief Results Tile
Views Wizard > Edit Brief Results Attributes

- E-Shelf – will always appear in the New UI, unless removed with the CSS.

- Define link from title – it is hardcoded for the NUI and will always open the Full Display of the record

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Brief Results Tile
Views Wizard > Edit Brief Results Attributes

- Order of tabs - GetIt1 and locations are combined under the Get It section in the new UI.

- Facebook – not planned to be included in the New UI, yet.

- Number of records – in the New UI records are loaded in the bulk of 10.

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Refine My Results (facets) Tile

- Display "Show only" facets on the top of the brief results list – unavailable in the New UI

Additional functionalities

☑ Display "Show only" facets on the top of the brief results list
☑ Display "Show only" facets on top of "Refine My Results"
☑ Display "RSS", "Save Search" and "Add page to e-Shelf" on top of the facets options

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Added for the New UI in the BO

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Brief Results Tile
Views Wizard > Edit Brief Results Attributes

• Define Sign-in message (in new UI)

Define Sign-in message (in new UI)

☑ Display Sign-in message
   ○ Not Signed-in users   ◉ Off Campus and not Signed-in users

Front End

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Brief Results Tile
Views Wizard > Edit Brief Results Attributes

• Sign in message disabled

Define Sign-in message (in new UI)

☐ Display Sign-in message
   ○ Not Signed-in users   ◉ Off Campus and not Signed-in users

Front End

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Mapping Tables - Availability/Service Link column

- GetIT! link 1 Configuration

Mapping Tables

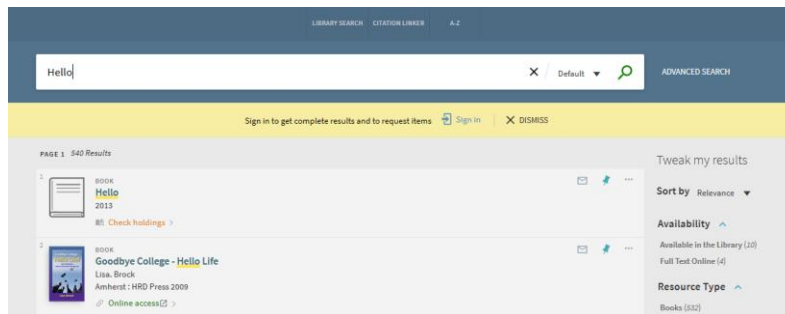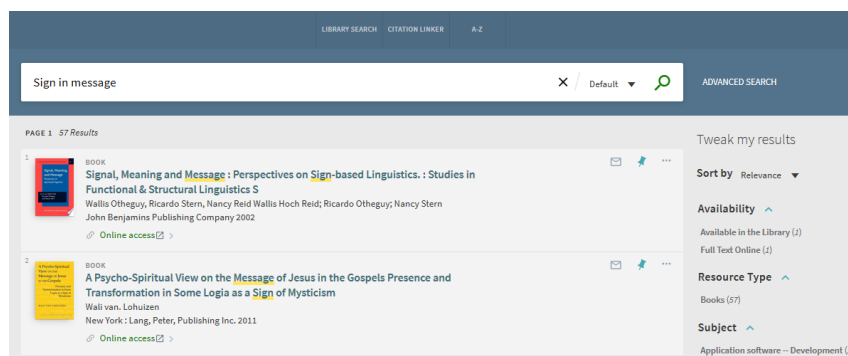Update for Owner: ALMA_INST - Training and Integration Sub System : Delivery ▾   Table Name : GetIT! Link 1 Configuration ▾   Search in Table: Reset   Delete

Mapping Table Rows

Enabled	Delivery Category Code*	Availability Status Code*	Data Source Code*	Direct link to online resource	Availability/Service link	Link field in PNX	Description
☑	SFX Resource	not_restricted	ALL	Y	Out@@display	openurlfulltext	
☑	Alma-P	available_in_other_institution	ALL	N	Full@@activate	Almagetit	
☑	Remote Search Resource	getit	ALL	N	SP@@activate	almagetit_services	
☑	Microform	does_not_exist_in_my_institution_check_holdings	ALL	N	Ovl/OvP	linktoholdings	
☑	Alma-E	may_be_restricted	ALL	Y	Full@@activate	Almaviewit	
☑	Remote Search Resource	fulltext_linktorsrc	ALL	Y	Out@@display	linktorsrc	
☑	Alma-P	check_holdings_in_library	ALL	N	Full@@activate	Almagetit	
☑	Alma-E	restricted	ALL	Y	Full@@activate	Almaviewit	
☑	Physical Item	available_in_my_institution	ALL	N	Ovl/OvP	linktoholdings	
☑	Microform	check_holdings	ALL	N	Ovl/OvP	linktoholdings	
☑	Remote Search Resource	viewit_NFT	ALL	Y@@almasingle_services	SP@@activate	almaviewit_services	
☑	Physical Item	available_in_library	ALL	N	Ovl/OvP	linktoholdings	
☑	Microform	available_in_maininstitution	ALL	N	Ovl/OvP	linktoholdings	
☑	Alma-E	not_restricted	ALL	Y	Out@@activate	Almaviewit	
☑	Remote Search Resource:Alma	no_fulltext_linktorsrc	ALL	N	Full@@activate	Almagetit_remote	
☑	Alma-P	does_not_exist_in_my_institution_available	ALL	N	Full@@activate	Almagetit	
☑	Alma-D	not_restricted	ALL	Y	Out@@activate	Almaviewit	
☑	Microform	available_in_institution	ALL	N	Ovl/OvP	linktoholdings	
☑	Remote Search Resource	viewit_getit_NFT	ALL	Y@@almasingle_services	SP@@activate	almaviewit_services	
☑	Microform	unavailable_in_maininstitution_nomore	ALL	N	Ovl/OvP	linktoholdings	
☑	Remote Search Resource	viewit_FT	ALL	Y@@almasingle_services	SP@@activate	almaviewit_services	
☑	SFX Resource	restricted	ALL	N	Out@@display	openurl	

Availability/Service Link field

- Indicates how the system should handle the availability links on the Brief Results page, and the display of the services, which may display on the Full Display page or a new page.

- The structure of the filed:

<availability>@@<service_link>

<availability> - open a new page or display the Full Display page. The valid values are:

  Out – The availability link directs to an external link on a new page.

  Full – Used for Alma only to open the full display page with focus on the Alma's Get It 1 service.

Availability/Service Link field

OvL/OvP – This option allows the system to determine automatically whether your environment is using OvP or OvL.

OvL - an external link to the OPAC opens on a new page.

OvP - the record's full display opens with focus on the Get It 1 service. The <service_link> parameter is not in use for this option.

SP – This option is used internally for use with the Alma Services page.

bX – This option is used internally for use with bx recommendations.

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Availability/Service Link field

<service_link> – indicates whether to display Alma's mashups, force Alma to display full text, or display links to the external sites. The valid values are:

- **activate** – Required by Alma to display the mashup or force display of full text.
  Use Full@@activate to open the Alma's mashup in the record's full display, or use Out@@activate to force Alma to display full text on a new page.

- **display** – For all other online categories, specify this value to display the links to the external sites. For example: Out@@display

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Availability/Service Link field

- Full@@activate

- After clicking on "Online Access"

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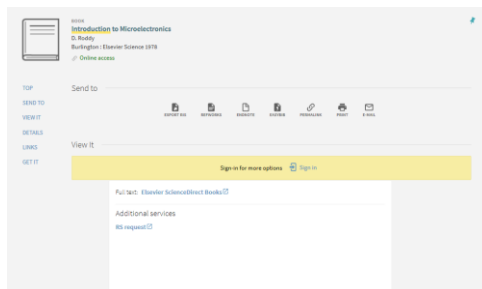
Availability/Service Link field

- Out@@Activate

Click on "Online Access"

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Customization Package

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Customization Package

- The Customization Package Manager allows you to upload and manage customization packages, which allow you to brand and further customize the Primo UI. For more information on the tool, see UI Customization Package Manager.

- To ensure that a customization package integrates properly with Primo, the package must contain the following folders:
  - CSS
  - HTML
  - JS
  - Image

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Customization Package Content

- **css** – This folder contains the `custom1.css` file, which is where you can include your CSS rules. These rules will override corresponding rules in the default CSS. \

- **img** – This folder contains all customized images for the new Primo UI. To ensure that the correct image appears in the Primo UI, make sure that you use the same file name as the original.

- **html** – This folder contains all customized HTML files for the new Primo UI. The `home_en_US.html` file allows you to customize the area of the page below the search box on the Primo Home page.

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UI Customization Package Manager

Primo Home ->Primo Utilities -> UI Customization Package Manager

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Downloading a Package

- You can download a blank template, or the current customized template

Download a Package

Template package ⓘ	Download	
Central package ⓘ	Download	(A Package has not been loaded)
Auto1 package ⓘ	Download	(A Package has not been loaded)

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Basic Steps

- Unzip the ZIP file.
- If using the template file, change the name of the root folder to your view's code.
- Add your customized images and CSS. You must retain the file structure and names of files that you are overriding.
- Once customizations are complete, Zip the Configuration package folder (recommended to use 7Zip)
- Open the UI Customization Package Manager (Primo Home > Primo Utilities > UI Customization Package Manager).
- Select the View Code that you want to customize.
- In the Upload package section, click Choose File to select the zipped package that you just created or modified for that view and institution.

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Customization Package – Images

- Any of the out-of-the-box images can be customized by creating or modifying a view's package, placing the customized image under the img folder, uploading the updated package to the server, and then deploying the package.

Here are some of the commonly customized images for the purpose of branding:
- library-logo.png – Contains the library logo.
- favicon.ico – Contains the favicon.
- icon_*<resource_type>*.png – Contains the image for the specified resource type *<resource_type>*. For example: icon_audio.png

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Customization Package – Images

- The logo file must be named library-logo and must be of filetype – PNG

- Resource Type Icons must be named accordingly.
  - icon_*<resource_type>*.png

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Gulp Environment

Using the Gulp Environment and Recipes

Gulp Environment

- We have sent our instructions ahead of the Session, and will try to go through several tasks together.

- The Gulp Environment is available on GitHub which also contains instructions on how to install the environment
  - http://Github.com/ExLibrisGroup/primo-explore-devenv
- We have setup instructions on how to install the environment which are available as a separate electronic document

Gulp – Getting Started

- The Gulp environment is available to all users and can be run from a command line, or terminal if on a Mac
- The Gulp Environment allows for testing and customizing locally on your own machine, and does not affect the Production environment
- In order to connect to your Primo Environment, you will need to include a Primo Url in the config.js file, and a corresponding View Code must be present on the server
- You can use the Gulp Environment to test changes locally and create a zip package. You will still need to connect to the Back Office in order to upload a Customization Package and Deploy the change

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App-Colors

One available Gulp Command is App-Colors. This allows for identifying 5 primary colors to be used that is then output to a CSS file and is applied to your Primo Environment.

- There is a colors.json file that can be updated to include the 5 color components

```
{
  "primary": "#53738C",
  "secondary" : "#A9CDD6",
  "backgroundColor" : "white",
  "links": "#5C92BD",
  "warning": "tomato",
  "positive": "#0f7d00",
  "negative": "gray",
  "notice": "#e08303"
}
```

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Setting up the View Folder

- You will also need to have a template folder present in the primo-explore\custom folder. The template folder will need to be renamed to the name of the View being edited.

- You can include multiple view code names in this folder

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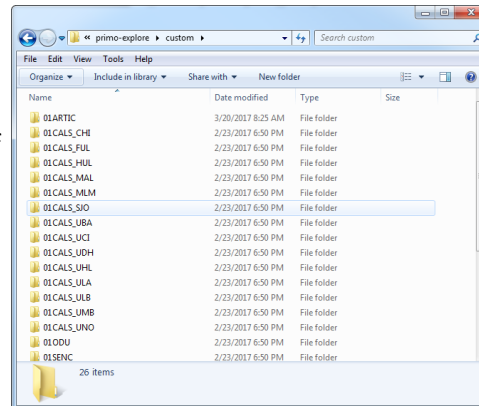
Running the Environment

- At this point, you should have the environment installed and the config.js file should be pointing the to the environment you will be working on.
- A View folder should exist in the primo-explore\custom folder
- Open a Command Terminal Window and cd to the root directory where Gulp is installed

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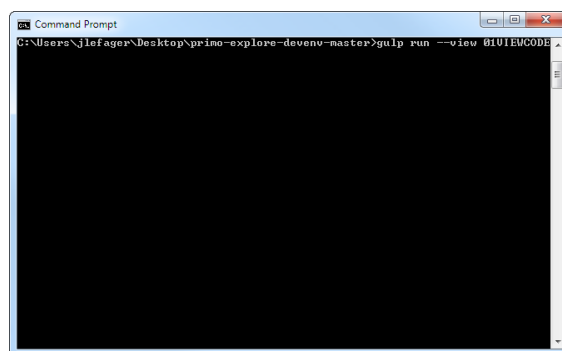
Gulp Run Command
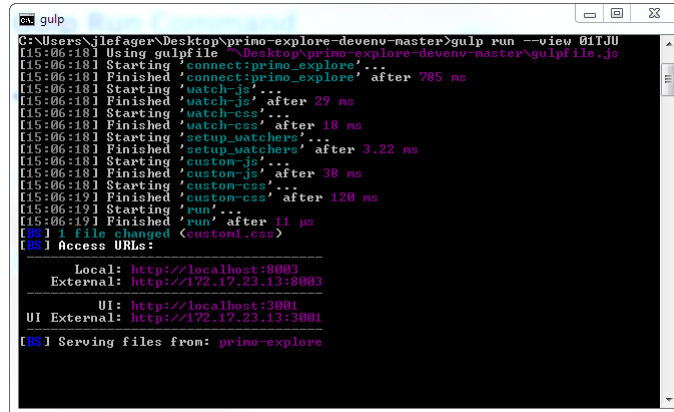
- Run the following command and watch the magic happen

`Gulp run –view NAMEOFYOURVIEW`

Upon Success you should see the following:

View in your Browser

- To view the environment in your browser, go to the following url

http://localhost:8003/primo-explore/search?vid=YOURVIEWCODE

App-Colors CSS

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App-CSS

- There is a gulp command available that can run a sweeping change across your Primo Environment, applying Base colors and gradients all at once.

- It applies colors based on a json file located at the root of your gulp environment directory to a new file in your CSS folder, app-colors.css

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Steps to Run App-CSS

- Open the colors.json file in the root of your view folder and make any changes

- cd to the project base directory (C:**\primo-explore-devenv)

- Run gulp app-css --view <your-view/folder code> for example:
  ```
  gulp app-css --view YOURVIEWCODE
  ```

- A new file will be created on your package css directory named: app-colors.css

App-CSS – VERY IMPORTANT!!!

- After running app-css, it places a new file called app-colors.css in the CSS folder of your View
- When you run the gulp run --view ViewCode command, this will replace the contents of custom1.css with any and all css files contained in the css folder

- !!This means if you have custom css in the custom1.css, this file will be overwritten and you will lose any changes
- It is recommended that you create a separate css file for other customizations and place it in this directory – Example: VIEWCODE.css
- By doing this, when you run the gulp command, all files will be concatenated together into custom1.css

CSS & JS Recipes

Recipes to use in the Gulp Environment

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Changing Resource Type Icons

- Try replacing resource type icons in the images folder.

- A good resource for icons is https://thenounproject.com/

- Download an icon of your choice for book, rename it to icon_book.png and place it in the images folder

- Run the gulp environment command to see your changes
  ```
  gulp run --view ViewCode
  ```

- Try adding a different image

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Creating a Clickable Logo Image – Part 1

In the View's package, add the following CSS

```
/* Call the clickable logo */
prm-logo div.product-logo {display:none;}
prm-logo div.product-logo-local {
display: flex;
}
prm-logo .logo-image, prm-logo img {
    max-height: 35px;
}
```

Creating a Clickable Logo Image – Part 2

In the View's package, add the following to custom.js

```
// Add Clickable Logo
app.controller('prmLogoAfterController', [function () {
var vm = this;
vm.getIconLink = getIconLink;
function getIconLink() {
            return vm.parentCtrl.iconLink;
        }
}]);

app.component('prmLogoAfter',{
bindings: {parentCtrl: '<'},
controller: 'prmLogoAfterController',
template: '<div class="product-logo product-logo-local"
layout="row" layout-align="start center" layout-fill
id="banner" tabindex="0"  role="banner">' +
'<a href="[target's_URL]"><img class="logo-image"
alt="{{::(&apos;nui.header.LogoAlt&apos; | translate)}}"
ng-src="{{$ctrl.getIconLink()}}"/></a></div>'
});
})();
```

Move Facets to the Left

Add the following lines to the custom1.css file

```
prm-search > md-content.padded-container-primoExplore-theme  {
    display: -webkit-flex; !* Safari *!
    -webkit-flex-flow: row-reverse wrap; !* Safari 6.1+ *!
    display: flex;
    flex-flow: row-reverse wrap;
}
.flex-gt-md-25.sidebar{
    webkit-flex: 0 0 15%;
    flex: 0 0 15%;
}
.main{
    webkit-flex: 0 0 65%;
    flex: 0 0 65%;
}
.layout-row>.flex-gt-lg-10{
    webkit-flex: 0 0 16%;
    flex: 0 0 16%;
    max-width: none;
}
```

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Move Paginator to the Right

- Add the following to custom1.css

```
/*---Move Pagination to the Right----*/


.__gt-xs prm-page-nav-menu {right: .5em;}
.__gt-md prm-page-nav-menu {
    bottom: 1.5em;
    right: 1em;
}


prm-page-nav-menu {
    position: fixed;
    z-index: 11 ;
    bottom: 4.75em ;
    right: 0;
    left:auto !important;
}
```

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Hide Virtual Browse

Add the following to custom1.css

```
/*CSS to Hide Virtual Browse and Virtual
Browse Button/link on Full Display */
#virtualBrowse {display:none;}
button[aria-label="Virtual
Browse"]{display:none;}
```

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Re-Order Library Card | Sign Out Navigation

Add the following to custom1.css
```
/*re-order My Library Card and Sign in/out
links */
.md-toolbar-tools .md-fab-action-item:nth-
child(1) {position:absolute;right:300px;
top:0;}
.md-toolbar-tools .md-fab-action-item:nth-
child(2)
{position:absolute;right:150px;top:0;}
.md-toolbar-tools .md-fab-action-item:nth-
child(3)
{position:absolute;right:0px;top:0;}
```

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Replace Magnifying Glass Icon

Add the following to custom1.css

```
#magnifying-glass {display:none}
.search-actions button[aria-label="Search"]
{
  background-
image:url("http://opensourceconnections.com/
images/search-disco-logo-sq-sm-2.png");
  background-size: 70px
}
```

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Additional Resources

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Some Tips

- When creating the ZIP file of the customization package, we recommend using 7Zip
  - http://www.7-zip.org/download.html

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Next Steps and Support Resources

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Support Resources and Further Reading

- **New UI Best Practices**
  - https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/New_Primo_User_Interface/New_UI_Customization_-_Best_Practices
- **Packages Created by Customers:**
  - https://www.npmjs.com/search?q=primo-explore&page=2&ranking=optimal
- **GitHub Repositories**
  - https://github.com/search?utf8=%E2%9C%93&q=primo-explore

Q & A

Any Questions?

Session Survey Evaluation

Please use the following link
<insert here> to provide feedback on
your sessions.

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THANK YOU

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