Resource Types

Configuring Resource Types in Primo

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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.

• Matt Warnock

Matt joined the Primo Support Team at the end of 2014 and has recently transitioned to the Customer Success Team. He has worked in both public and academic library settings. He has a MLIS from the University of Illinois at Champaign-Urbana.

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Objectives and Target Audience

- Brief Session Description:

  This session explores configuration of resource types in Primo and provides a framework for customizing Primo's defaults to the needs of your library. We will discuss PNX elements related to resource type and demonstrate how to align your e-books with Primo Central books. You will also get a tool to help manage your resource type mappings.

- Session Objective(s)
  - By the end of this sessions you will know, understand and/or be able to:
    - Understand how resource types work in Primo
    - Understand the difference between resource types for Primo Central and local Primo records
    - Configure custom resource types for your institution.

- Session Target Audience:
  - New and Experienced Customers

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Agenda

1 **What are resource types in Primo?**

2 **Resource types in the PNX**

3 **Why add a new resource type?**

4 **Configuration Steps**

5 **Example: Aligning Primo Central and Local ebooks**

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What is a Primo Resource Type?

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Which Resource Type?

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Concepts

The "resource type" in Primo is a set of separately configurable PNX elements
- These elements may or may not align; they have no inherent relationship

Set of over 20 out-of-the-box resource types covers most common formats
- These pre-defined types are also used by Primo Central

New types can be added based on the needs of your library, but for local resources only
- Primo Central records have assigned PNX elements for resource type that cannot be changed

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Resource Types in the PNX

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Key PNX elements for Resource Type

Display/type	**Facets/rsrctype**	**Facets/prefilter**
corresponds to the icon next to record	corresponds to the material type in facets area	corresponds to the advanced search dropdown

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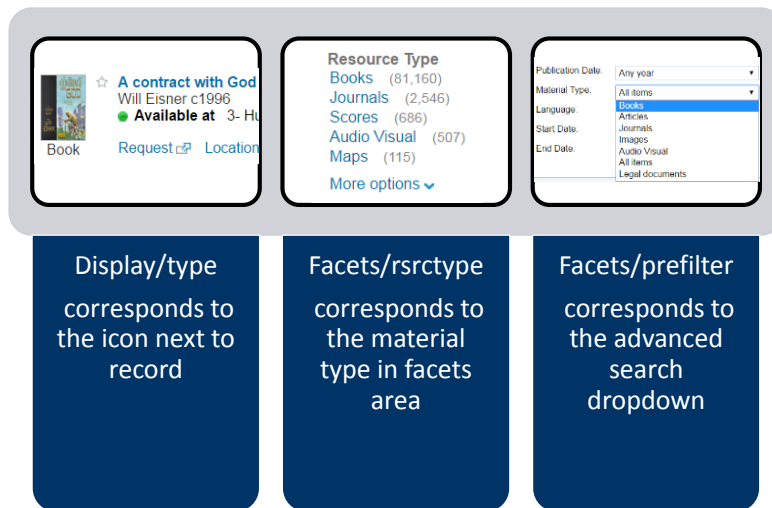
Honorable Mentions

search/rsrctype

- a search for the resource type will yield search results based on this section
- Example: search for "Libguides" and see libguides in the result set

addata/ristype   addata/format   addata/genre

- Used to populate the openURL used for delivery of electronic resources
- Used in the Actions menu for Export RIS, RefWorks, etc

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A Look at the PNX

- Since the PNX elements are separately configurable, resource type values may vary between PNX sections

Display

```
▼<display>
  <type>dvdvideo</type>
  <title>A scanner darkly</title>
  ▼<contributor>
    Richard Linklater, 1960-; Palmer West; Keanu
    Kelly; Graham Reynolds, 1971-; Thousand Word
    Independent Pictures.; Warner Home Video (Fi
  </contributor>
  <publisher>Burbank, CA : Warner Home Video</pu
  <creationdate>c2006</creationdate>
  <format>1 videodisc (100 min.) : sd., col. ; 4
```

Facets

```
<prefilter>dvd_videos</prefilter>
<prefilter>audio_video</prefilter>
<rsrctype>dvd_videos</rsrctype>
<creatorcontrib>Linklater, R</creatorcon
<creatorcontrib>West, P</creatorcontrib>
<creatorcontrib>Reeves, K</creatorcontri
<creatorcontrib>Downey, R</creatorcontri
<creatorcontrib>Harrelson, W</creatorcon
<creatorcontrib>Cochrane, R</creatorcont
```

Search

```
<isbn>9781419802430</isbn>
<isbn>1419802437</isbn>
▼<toc>
  Special features: commentary by Keanu
  Dick's daughter, Isa Dick Hackett --
  -- theatrical trailer.
</toc>
<rsrctype>dvdvideo</rsrctype>
<creationdate>2006</creationdate>
<startdate>20060101</startdate>
<enddate>20061231</enddate>
<addtitle>Scanner darkly.</addtitle>
```

Additional Data

```
<addau>Warner Home Video (Firm)</
<btitle>A scanner darkly</btitle>
<date>2006</date>
<risdate>2006</risdate>
<isbn>9781419802430</isbn>
<isbn>1419802437</isbn>
<format>video</format>
<genre>video</genre>
<ristype>VIDEO</ristype>
```

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Why add a new resource type?

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Why add a new resource type?

- Represent local collections that don't fit the pre-defined types
- Add granularity

- Examples:
  - Distinct resource types for audio and video formats
  - Distinct resource type for libguides/research guides
  - Unusual collections like action figures or miniature books

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Problem: Video formats are not specific

- Searching for a video title doesn't provide immediate information on format
- Users want to know immediately whether the video can by played on their device
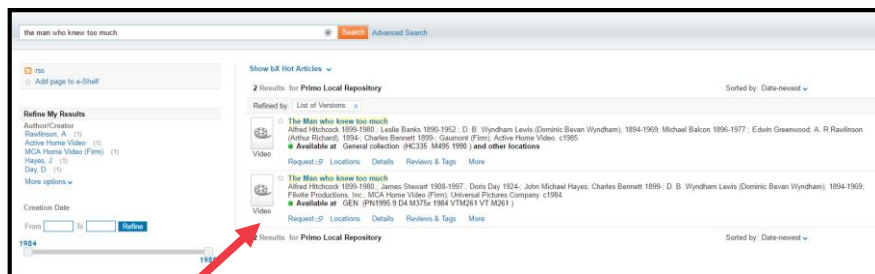
No indication if the video is DVD, VHS, or something else

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Problem: No resource type facet after pre-filtering

- Since all audio visual materials have the facets/rsrctype "media" the resource type facet doesn't display after applying audio visual pre-filter
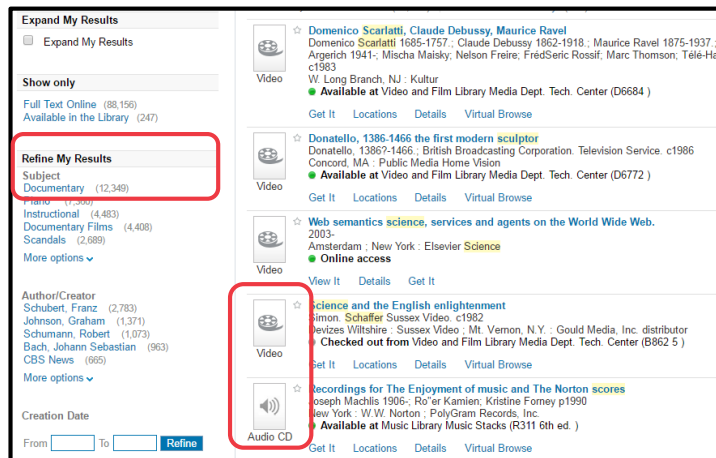
Objectives

Goals for new Video Format resource types

Individual records display specific format (DVD, Blu-ray, etc)

Facet values also display specific format

Pre-filter dropdowns show the more general type "Audio Visual" that contains all relevant formats

Configuration Steps

Walkthrough: adding a new resource type

- First Step: identify field(s) in the source records that can be used to identify the resource type
- For my data source, I used MARC 007 position 4 for videorecording format
- The specific data source doesn't matter, as long as it can be used to consistently identify the resource type
- Normalization rule:

Example: Resource Types for Video Formats

- My rule uses a mapping table I created for video formats.
- Normalization rule will check character at 007 position 4 and copy the targetCode to display/type

Mapping Tables

Update for Owner:	Installation	Sub System :	Normalization	Table Name :	type_007_4

Mapping Table Rows

Enabled	sourceCode1*	targetCode
☑	z	other
☑	b	vhs
☑	g	lazerdisc
☑	s	blu-ray
☑	v	dvd

All Mapping Tables > Normalization Sub System > Create a new Table

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Other Normalization Mapping Tables

Mapping Table: format_mean

- Used to define the resource type filter in the Facets section.
- Add a row for the new resource type

Type	XPath
PNX	display/type

Transformation

Use mapping

Update for Owner:	Installation	Sub System :	Normalization	Table Name :	format_mean

Mapping Table Rows

Enabled	Source Code*	Target Code
☑	vhs	vhs
☑	lazerdisc	lazerdiscs
☑	blu-ray	blu-rays
☑	dvd	dvds
☑	patent	patents
☑	technical_report	technical_reports

Mapping Table: pre_filter

- Used to define the prefilter facet in the Facets section.
- Add a row for the new resource type

Type	XPath
PNX	display/type

Transformation

Use mapping ta

Split Field

Update for Owner:	Installation	Sub System :	Normalization	Table Name :	pre_filter

Mapping Table Rows

Enabled	Source Code*	Target Code
		audio_video
☑	vhs	audio_video
☑	lazerdisc	audio_video
☑	blu-ray	audio_video
☑	dvd	audio_video
☑	audio	audio_video
☑	video	audio_video

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Static Facets Mapping Tables

Mapping Table: facet_rtype_values

- Defines the facet value for static facets
- Resource Type is a static facet

DVDs	dvds
VHS	vhs
Lazerdiscs	lazerdiscs
Blu-ray Discs	blu-rays
Patents	patents
Comicss	comics
Rare Book	rare_books

Mapping Table: facet_pfilter_values

- Defines the facet pre-filter values.
- Populates the Basic Media Type code table and the media types on the Basic Search tile in the Views wizard.

Reviews	reviews
Statistical Data_sets	statistical_data_sets
Audio Visual	audio_video
Scores	scores
Technical Report	technical_report

- Since the normalization pre_filter table maps all video formats to audio_video, no changes are needed for this table

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Code Tables

Code table: Facet Resource Type

- Defines the display label for facet values that appear in the refine my results panel
- Can be used to translate the code to other languages

Refine Search

Include	Exclude	Resource Type
☐	☐	Books (56,156)
☐	☐	Journals (2,213)
☐	☐	Scores (654)
☐	☐	VHS (240)
☐	☐	Audio Visual (200)
☐	☐	Other (75)
☐	☐	Maps (73)
☐	☐	Blu-ray Discs (36)
☐	☐	Laserdiscs (25)
☐	☐	DVDs (20)
☐	☐	Web Sites (19)
☐	☐	Images (4)
☐	☐	Text Resources (2)

Code Table: Icon Codes

- Determines the text beneath the item's resource type icon

☆ **Back to the future the complete trilogy**
Neil Canton; Bob Gale; Robert Zemeckis 1952-; N
Steenburgen; Steven Spielberg 1947-; Alan Silve
● **Check holdings at** WhiteShore Main Library
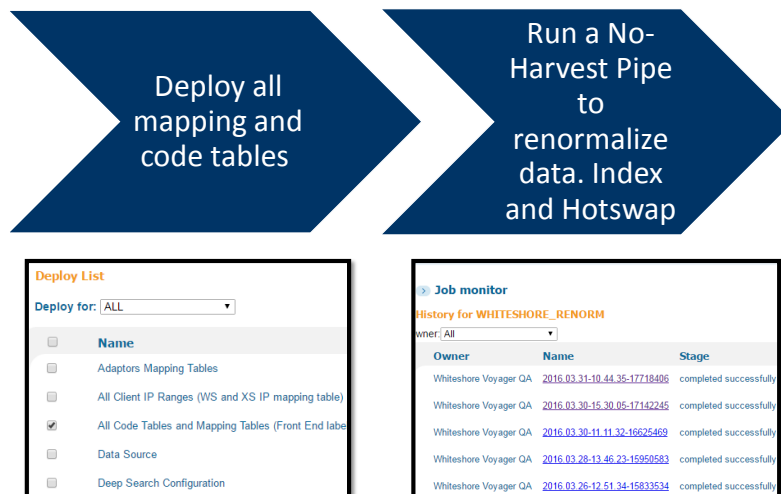DVD
Request   Locations   Details   Reviews & Ta

☆ **Metal casting sand moulds**
Don Scutt; Terry Trewavas; Double D Technical P
Australia. c2004
● **Checked out at** 4O- Audio-Visual Material (D
DVD
Request ⤴ Locations   Details   Reviews & T

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Completing the Process

Deploy all mapping and code tables

Run a No-Harvest Pipe to renormalize data. Index and Hotswap

Deploy List

Deploy for: ALL

	Name
☐	Adaptors Mapping Tables
☐	All Client IP Ranges (WS and XS IP mapping table)
☑	All Code Tables and Mapping Tables (Front End label)
☐	Data Source
☐	Deep Search Configuration

Job monitor

History for WHITESHORE_RENORM

wner: All

Owner	Name	Stage
Whiteshore Voyager QA	2016.03.31-10.44.35-17718406	completed successfully
Whiteshore Voyager QA	2016.03.30-15.30.05-17142245	completed successfully
Whiteshore Voyager QA	2016.03.30-11.11.32-16625469	completed successfully
Whiteshore Voyager QA	2016.03.28-13.46.23-15950583	completed successfully
Whiteshore Voyager QA	2016.03.26-12.51.34-15833534	completed successfully

Configuration Tips

Source code in pre_filter table must equal the value in display/type

Code and mapping tables should maintain consistent capitalization and singular/plural values across resource types
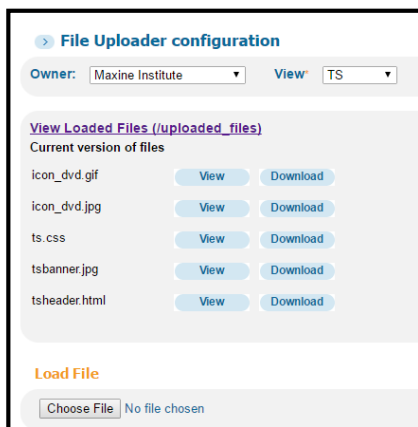
Mapping tables often have corresponding Code table

Example:
facet_rtype_values → Facet Resource Type

Customizing the Resource Type Icon

- Unless otherwise configured, custom resource types will use the book icon
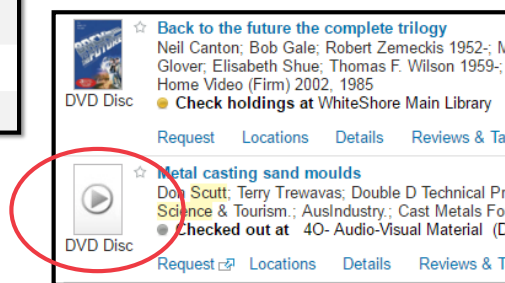- Upload new icons and reference them in your custom CSS file

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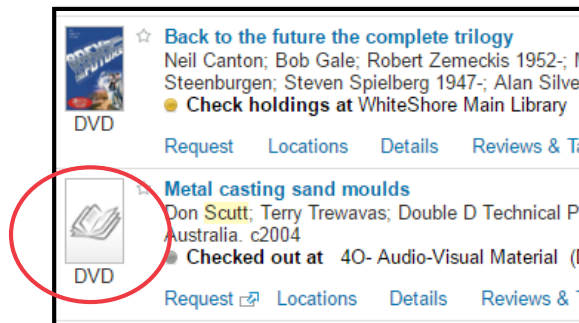
File Uploader + CSS changes

Add the following to your CSS file:

.EXLResultMediaTYPEdvd
.multipleCoverImageContainer
{background-image:
url('./icon_dvd.jpg');}

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Example: Aligning Primo Central and Local ebooks

Primo Central Resource Types

Primo Central has no concept of physical books, so uses resource type "book" for electronic books

Most local collections use resource type "book" for physical books

This can cause confusion and issues with faceting

Solution: customize resource type for physical books

Normalization Rule

- Assigns type "pbook" to all physical resources that would otherwise be "book"
- Electronic books receive resource type "book" to match Primo Central ebooks

A Look at the PNX

Physical Books

Electronic Books: local and Primo Central

Improved Facet Behavior

Faceting by Physical Books no longer returns Primo Central e-books

Refined by: resource type: **Print Books** x

1 Print Book — ☆ **Trepanation : history, discovery, theory**
Robert Arnott; Stanley Finger; C. U. M. (Christopher Upham Murray) Smith; ©2003
● Check holdings
Availability and Request Options   Details

2 Print Book — ☆ **Trepanation : discovery, history, theory**
Robert Arnott, 1951-; Stanley Finger; C. U. M. (Christopher Upham Murray) Smith; ©2002
● Check holdings
Availability and Request Options   Details

Faceting by e-books returns local and Primo Central e-books

Refined by: resource type: **eBooks** x

1 eBook Chapter — ☆ **Trepanation - en uråldrig operationsteknik**
Jennbert, Kristina ; Arcadius, Kerstin ; Bogaeus, Sofie; 2008
Skånska läkekonster. Medicinhistoria och folkmedicin från forntid till nutid, pp.15-21
● Full text available
Access Options   Details   Availability and Request Options

2 eBook — ☆ **Trépanation néolithique, trépanation pré-Colombienne, trépanation des Kabyles, trépantion traditionnelle**
Lucas-Champonnière, Just Marie Marcelin; 1912
● Full text available
Access Options   Details   Availability and Request Options

Next Steps and Support Resources ***to fill in***

- Additional information on setting up Resource Types in Primo:
  - Resource Types - All You Need to Know
  - How to add a searchable resource type to Primo
  - Preventing FRBR Groups Based on a Resource Type

- 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)

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Q & A

Any Questions?

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Session Survey Evaluation

Please use the following link
https://www.surveymonkey.com/r/techsem2017
to provide feedback on your sessions.

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