



## Getting Started with Primo

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## Primo Documentation

This guide describes the documentation that is available with the latest version of Primo and explains the main purpose of each documentation component.

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## Primo Guides

The following Primo guides are available:

- [Primo Version Highlights](#) – Describes the changes and enhancements made to Primo for the current release. This guide should be read prior to upgrading to this version of Primo. For information regarding defect fixes, see [Release Notes and Videos](#).
- Customer Guide to Primo Documentation (this guide) – Describes the documentation that is available for Primo, how it can be accessed, and how it should be used.
- [Primo Service Pack Installation Guide](#) – Describes the SP Utility and the process used to include defect fixes and enhancements for Primo during the current release.
- [Primo Online End User Help](#) – Describes how to use the main functions in the Front End user interface.
- [Primo Analytics Guide](#) – Describes how to use the Primo Analytics user interface and create reports.
- [Primo Back Office Guide](#) – Contains instructions on how to use the Back Office for configuring Primo's Front End, monitoring Primo's status, and configuring the Publishing Platform pipe flow. This guide is used during the initial and ongoing configuration of the system. It is also used for implementing advanced configuration elements.
- [Primo Technical Guide](#) – Provides more advanced information about the Primo system, including the PNX record, the duplication detection process, FRBRization, customizing Primo's user interface, linguistic features, and mapping to the normalization record.
- [Primo Interoperability Guide](#) – Provides the customer with specific configuration information for the Primo system when using Primo in conjunction with other Ex Libris products. The guide contains configuration information such as user authentication, harvesting data, harvesting availability for ILS systems, linking to delivery systems, and remote search for MetaLib.
- [Primo System Administration Guide](#) – Provides a detailed technical overview of the Primo system and its components. In addition, the guide contains instructions on how to perform system administrative tasks, including: starting and stopping the system, performing system cleanup, accessing reports and log files, and managing the Primo database.

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## API Documents

The Primo open interface pages in the Ex Libris Developer Network describe the applications and commands that you can use to enhance or modify Primo's functionality in the Back Office and the Front End.

### To access this documentation in the Ex Libris Developer Network:

1. Enter the following URL in a browser:

<https://developers.exlibrisgroup.com/primo/apis>

2. Log on with the user name and password that have been provided to you by Ex Libris.

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## Documentation Feedback

Ex Libris is interested in improving its documentation and welcomes your comments and suggestions. To submit comments by e-mail, please send your message to:

[Documentation.Team@exlibrisgroup.com](mailto:Documentation.Team@exlibrisgroup.com)

## Primo Glossary

This section contains a glossary of terms used in the Ex Libris Primo system.

### Glossary

Term	Definition
Alerts	You can save a search query, and have the search set to be performed automatically. An alert notifies you if there are any new search results.
Availability pipe	The availability pipe checks for available updates several times throughout the day.
Availability text	This text is determined by Primo. It appears next to the item name and indicates to the user the availability of the resource.
Back Office	The user interface and programs that manage the Publishing Platform.
Basic Search	A configurable tile in the Views wizard. The user uses this tile to search for a specific item.
Blended search	A search in which several search engines are used to create a single results list. The most common blended search is between Primo and Primo Central.
Boost	A positive value applied to groups of records to allow them to appear earlier in the search results list when sorted by relevance. See Deboost.
Brief Display	The information (such as the title and availability status) that displays for each record in the brief results and allows users to determine whether a record is available and contains the information for which they are looking.
Brief Results	A configurable tile in the Views wizard. After the user searches for a specific item, the results appear in this tile.
Bulks	The publishing pipe process records in groups of records that are called bulks. By default, the bulk size is 1000 records.
Data source	The data source from which the Publishing Platform harvests records. A single source system may contain several data sources. For example, in terms of SFX, Primo harvests a single SFX instance. A single SFX installation may include several instances (that is, data sources). In Aleph and Voyager, every bibliographic database is a separate data source. A single installation of Aleph or Voyager may include several bibliographic databases that are harvested by Primo.

Term	Definition
Deboost	A negative value applied to groups of records to prevent them from appearing earlier in the search results list when sorted by relevance. See Boost.
Delivery restricted scopes	Restricted delivery scopes indicate access restrictions for online resources.
Double metaphone	The double metaphone search algorithm is a phonetic algorithm and is the second generation of the metaphone algorithm. It is called "double" because it can return both a primary and a secondary code for a string. For example, encoding the name "Smith" yields a primary code of SM0 and a secondary code of XMT, while the name "Schmidt" yields a primary code of XMT and a secondary code of SMT. Both have XMT in common.
E-shelf	E-shelf lets you save search results in your Basket.
Facets	A configurable tile in the Views wizard. The tile opens relevant links that might interest the user, determined from the search that was made.
Front End	The user interface that is responsible for all interactions (such as discovery and delivery) with the end user.
Full Display	The details of an individual record that displays on its own page. This page typically displays after clicking a record's title in the brief results.
FRBR	The Primo Publishing Platform process in which records are grouped using the principles in the Functional Requirements for Bibliographic Records published by the IFLA Study Group on the Functional Requirements for Bibliographic Records.
Harvesting	The Primo Publishing Platform process in which new, modified, and deleted records are gathered from a data source (such as an ILS). This information can be obtained with one of the following harvesting methods: FTP, copy, or OAI-PMH.
Institution	The institution is a central administrative concept in Primo. Users and resources belong to institutions.
Main pipe	The main ILS pipe is generally run during the night and includes all updates to bibliographic records and related holdings and authorities.
Metaphone	Metaphone is a phonetic algorithm for indexing words by their sound, when pronounced in English. The algorithm produces keys as its output. Similar sounding words share the same keys and are of variable length in the metadata form.
n-gram	An n-gram is a sub-sequence of n items from a given sequence. n-grams are used in various areas of statistical natural language processing and genetic sequence analysis. The items in question can be letters, words, or base pairs, according to the application.

Term	Definition
Normalization mapping set	The set of normalization rules that convert source records to the PNX.
Normalization rule sets	Normalization rules are applied to the source data. These rules are used to translate the data source into a PNX format.
OPAC via Link (OvL)	The delivery method in which Primo links out to the ILS's user interface and displays it within a Primo i-Frame or new browser tab. From this interface, users can interactively perform requests and check their library cards.
OPAC via Primo (OvP)	The delivery method in which Primo uses APIs to support the following OPAC functions within its native interface: My Account, inventory display (holdings and items), and material requests.
Out of the Box (OOTB)	This term indicates that a specific configuration or setting (which can be configured by staff users) does not require any configuration to enable.
Patron Directory Services (PDS)	A "back-end" Web component that facilitates user authentication and login to an Ex Libris application. See Primo Authentication Manager.
Persistence layer	An Oracle database that is part of the publishing platform in which PNX records are stored before they are retrieved by the search engine.
Pipe run	Every execution of a publishing pipe is called a pipe run
Pipes	The pipe is the set of steps that the source information goes through before being turned into the PNX record.
PNX	The Primo normalized XML format. This is the common format to which all source records are converted.
PNX record	Primo normalized XML record. The source record is translated to this format and loaded into the Primo database.
Primo Authentication Manager	An alternative authentication method that supports the authentication of users using SAML, CAS, LDAP, Alma, Aleph, and social logins. In addition, this method supports the ability to use separate authentication systems for bor_auth and bor_info requests.
Primo Central Index (PCI)	A mega-aggregation of hundreds of millions of scholarly e-resources of global and regional importance. These include journal articles, e-books, reviews, legal documents and more that are harvested from primary and secondary publishers and aggregators, and from open-access repositories.

Term	Definition
Publishing pipe	Within the Publishing Platform, PNX records are created by publishing pipes. In principle, every data source has its own pipe with its own normalization mapping set.
Restricted search scopes	By defining restricted search scopes, you can restrict discovery of groups of records to specific users.
Scopes (Views)	<p>Scope is a general concept that is used to create groups of resources. Primo has three types of scopes:</p> <ul style="list-style-type: none"> <li>• Search scopes</li> <li>• Restricted search scopes</li> <li>• Restricted delivery scopes</li> <li>• Blended search scopes</li> </ul> <p>The term "scope" is also often used to refer to search scopes, which are defined per view.</p>
Search scopes	<p>Search scopes are defined per view and define a group of record that can be searched together. There are two types of search scopes:</p> <ul style="list-style-type: none"> <li>• A local scope is a subset within the Primo repository. The default is the entire local repository.</li> <li>• A remote scope is a list of records in a remote location outside the Primo repository.</li> </ul>
Search Engine (SE)	A system that retrieves library metadata from the local PNX database table and transforms it into useful information to provide relevant search results. In regards to Primo Central, the SE provides relevant search results based on metadata as well as full text.
Similar items	You can create a search for similar items. Similar items creates a search based on the author of the item from the previous search.
Slice	The Primo Search Engine supports multiple slices to reduce retrieval time for very large data sets.
Source record	The individual record from the data source that is converted to the Primo normalized record (the PNX).
Source system	The system from which the Publishing Platform harvests records—for example, Aleph, Voyager, and SFX.
Tagging	Users can add reviews and keywords to any item.
TotalCare	A fully hosted solution that provides initial configuration, ongoing application configurations (such as end user interface customizations), version upgrades, monitoring of data sources, and standard Support services.

Term	Definition
View	The View is the Primo user interface. You can define one or more view. Every view can have a different “look and feel” and list of search scopes.

## Primo Sandbox

The Primo sandbox environment is designed to provide a means for you to develop, test, and train without making your changes seen by patrons and without compromising the data in your production environment.

The Primo sandbox environments are completely isolated from your Primo production environment so that any actions performed in the sandboxes do not affect your production environment and any actions performed in your production environment do not affect the sandboxes.

As part of Primo's standard offering, Ex Libris provides a Standard sandbox. The Standard sandbox contains your configuration, which is copied from your production environment and is limited to a 100,000 record subset of your data. This can be used for staff training and testing of Primo setup scenarios, new enhancements, and the integration with other systems without affecting your production environment.

Sites may choose to upgrade to a Premium sandbox, which contains the library configuration from your Primo production environment and holds the full amount of records as per your production environment license.

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### Note

- You cannot have both a Standard sandbox and a Premium sandbox simultaneously.
  - The cloud sandbox environments are updated with the new Primo release two weeks before the general release to the production environments (refer to the exact release schedule published by Ex Libris).
  - The configuration can be copied from your Primo production environment or copied to your Primo production environment using the export/import tools (see [Primo Tools](#)).
  - For more details on working with your sandbox and Alma, see [Alma Sandbox Environments](#).
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