How to add Open Access and Peer Reviewed icons and facets to your local records in Primo

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Use case

As a user, I should be able to easily discover all the library’s peer-reviewed and open access content

Goal

Leverage existing source data and Primo functionality for a better user experience in a blended search environment, regardless of data source

Summary

• Configuration time: 15-30 minutes
• Configuration difficulty: Low - Medium
• Consistency of outcome: Dependent on good data
• Changes live in Primo UI: Dependent on number of records to index and hotswap, and hotswap timing

System specs (not all mandatory)

• Primo New UI, with a single local and remote blended search scope
  ◦ Open Access icon and facet – added in the Primo May 2018 Release
  ◦ Peer Reviewed icons – improved display in the Primo February 2018 Release
  ◦ Peer Reviewed facet – long-term feature of Primo
• Alma using MARC21, with a focus on utilising Community Zone (CZ) records wherever possible
  ◦ Open access (MARC 506) and Peer reviewed (500) icons and data addition and reindexing for Community Zone (CZ) records in the Alma February 2018 Release
• Institutional repository using Dublin Core, for example UQ eSpace
  ◦ Local data use of dc:identifier linktype fulltext to identify Open Access content
• Primo Multi-tenant Back Office, with pipes for Alma and Institutional Repository (UQ eSpace)

Workflow
• Gather one or two good example records from each data source: Alma MARC and UQ eSpace Dublin Core
  ◦ Tip! Copy the record numbers and take screenshots of the live Primo display for comparison

• Adjust the Display normalization rules for each data source
  ◦ Tip! Check the box to Display Empty PNX fields for the out-of-the-box OA field for Alma
  ◦ Tip! Add the xml of your example records and test that your rules are working
  ◦ Tip! Use the Comments fields in the BO normalization rules to add brief details of your work. Your future self will thank you

• Adjust the Facets Top Level normalization rules for Facets for each data source

• Deploy Normalization Rules

• Adjust the Mapping table: SubSystem Static Facets, Table Name facet_tlevel_values
  ◦ Tip! Don’t forget to Sync after you Save

• Check the Code table: SubSystem Front End, Table Name Top Level Facet
  ◦ Tip! This is just a check, as it should have synced. If not try syncing again and, if all else fails, add rows manually

• Deploy Code and Mapping Tables

• Run your No Harvest Update pipes for each data source
  ◦ Tip! Check your scheduling to make sure you don’t have New pipes running and check Indexing to make sure hotswap is not running

• Wait until the hotswap is done
  ◦ Tip! Check the History of the pipes and make sure all records are showing as Indexed and Hotswapped

• Test your example records from each data source in live Primo
  ◦ Tip! Use your institutional prepends, for example 61UQ_ALMA and 61UQ_ESPACE and then check facets for a comprehensive list

Troubleshooting

• 1st: No data in the PNX?
  ◦ Check the History in your No Harvest Update pipe and see if all the records have Indexed and Hotswapped
  ◦ If not, wait until they’ve all hotswapped, then check Production again
  ◦ Check one of your test records in the PNX Viewer
  ◦ Test your normalization rules on an example record in the Back Office

• 2nd: No icons in Brief Results or Full Record Display records?
  ◦ Check the Display section in the PNX for an example record and make sure the expected fields are there
  ◦ Check the Code and Mapping table entries
  ◦ Save, Resync the Mapping Table and Deploy Code and Mapping Tables again
  ◦ No need to wait for the hotswap if the data is already in your record PNX
  ◦ Close down all Primo sessions, reopen a fresh session and try again
- Clear your cache. Best way on Chrome is via the developer console by F12, click and hold the browser refresh icon, choose the last entry for ‘Empty Cache and Hard Reload’

- 3rd: No records in the Top Level Facets?
  - Check the Facet section in the PNX for an example record and make sure the expected fields are there
  - Check the Code and Mapping table entries
  - Save, Resync the Mapping Table and Deploy Code and Mapping Tables again
  - No need to wait for the hotswap if the data is already in your record PNX
  - Close down all Primo sessions, reopen a fresh session and try again
  - Clear your cache. Best way on Chrome is via the developer console by F12, click and hold the browser refresh icon, choose the last entry for ‘Empty Cache and Hard Reload’

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Alma Display Normalization Rule for Open Access icon

![Alma Display Normalization Rule for Open Access icon](image1)

Alma Display Normalization Rule for Peer Review icon

![Alma Display Normalization Rule for Peer Review icon](image2)
Alma Facets Normalization Rules for Open Access and Peer Review for Top Level Facet

Dublin Core (UQ eSpace) Display Normalization Rule for Open Access icon
Dublin Core (UQ eSpace) Top Level Normalization Rule for Open Access for Top Level facet

Sync the facet_tlevel_values Mapping Table for the Top Level Facet Code Table row creation

Code Table – Front End – Top Level Facet
Primo UI examples

Primo Central Index (PCI)

[Image]

Alma – MARC

[Image]

UQ eSpace – Dublin Core

[Image]

Ex Libris Relevant Guides and Release Notes

- Configuring Facets: [https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/060Back_Office_Guide/100Facets/020Configuring_Facets](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/060Back_Office_Guide/100Facets/020Configuring_Facets)
- Primo May 2018 Release: [https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/030Highlights/020Primo_May_2018_Highlights#Open_Access_Indication_and_Facet](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/030Highlights/020Primo_May_2018_Highlights#Open_Access_Indication_and_Facet)
- Primo February 2018 Release: [https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/030Highlights/025Primo_February_2018_Highlights#Peer_Review_Icons](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/030Highlights/025Primo_February_2018_Highlights#Peer_Review_Icons)