



## Primo Administration Normalization Rules Configuration Hands-on Exercise

### Learning Objectives

To access, view and test the normalization rule set that has been created for your library catalog data.

By the end of this exercise, you will be able to:

- Access and view normalization rule sets
- Test a normalization rule and rule set

### Requirements

To complete this exercise, you will need to have a Super Admin or Admin level password to your configured Primo Sandbox Environment.

Your Primo Sandbox will need to have the following configurations for this exercise:

- Your Institution created
- Data source for your ILS created
- Normalization rule configured for your catalog data
- Pipe created and run at least once for your library catalog data
- View created for your institution
- Access to the Front End of your view and data visible

### General Instructions

This exercise accompanies the **Primo Administration: Normalization Rules Configuration** training session. For help with the exercise, go to the training's launch page where you can review the presentation, download the presentation **Handout**, and find links to **Recommended Articles** in the Knowledge Center.

Please use your library's **Primo Sandbox Environment** to complete this exercise. Note that you will not be making changes to your Sandbox Environment, only viewing default settings and configurations that have already been made.

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### The Activity

#### View a normalization rule set

1. **Log into Primo Back Office**

2. Go to *Ongoing Configurations > Pipe Configuration Wizard > Normalization Rules Configuration*

OR

*Local Data > Normalization Sets* in the top navigation

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➤ Pipe Configuration Wizard

- Data Sources Configuration  
Manage and configure Data Sources
- Scope Values Configuration  
Manage and configure Scopes
- Normalization Mapping Tables  
Manage the Normalization mapping table values
- **Normalization Rules configuration**  
Manage and configure Normalization Rules
- Enrichment Sets Configuration  
Manage and configure Enrichment Sets
- Pipes Configuration  
Manage and configure Pipes

3. There will be at least one normalization rule set that has already been created for your library catalog data.

4. Check the *Display Template NR* box to see a list of the templates.

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➤ Normalization Rules Sets

Normalization Rules Sets

Owner: Alma Training  Display Template NR

Owner	Normalization Rules Set Name	Version	Description	Normalization Rules Format				
Alma Training	ALMA_NR	22		marc	Edit	Deploy	Test	Delete

Create a New Normalization Rules Set

Owner: Installation Duplicate from existing Normalization Rules Set ALMA\_NR Name  Create

5. Note that you will only be able to Edit, Deploy and Test the normalization rule that belongs to your institution, and not the OTB (out of the box) rules.

6. Click *Edit* to view the normalization rule that has been configured for your library catalog data.

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➤ Normalization Rules Sets

Normalization Rules Sets

Owner: Alma Training  Display Template NR

Owner	Normalization Rules Set Name	Version	Description	Normalization Rules Format				
Alma Training	ALMA_NR	22		marc	Edit	Deploy	Test	Delete
OTB	Generic danMARC2 - Template	9		marc	View			
OTB	Generic UNIMARC - Template	7		marc	View			
OTB	Rosetta - Template	11		dublin_core	View			
OTB	SFX - Template	20		marc	View			
OTB	DigiTool MARC - Template	18		digitool_entity	View			
OTB	ALEPH UNIMARC - Template	7		marc	View			
OTB	ALEPH KORMARC - Template	8		marc	View			
OTB	Alma Dublin Core - Template	2		complex_xml	View			
OTB	ALEPH MARC - Template	19		marc	View			
OTB	Alma MARC - Template	25		marc	View			

7. Select *Display* in the PNX section dropdown

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➤ Manage Normalization Rules

Normalization Rules Set: 01SYCAMORE\_ALMA\_NR PNX Section: Display  Display Empty PNX fields

Normalization Rules Set Attributes

Set Name: 01SYCAMORE\_ALMA\_NR Set Description: Enable:

Version: 22

Normalization Rules for PNX Section *display* in Normalization Rules set 01SYCAMORE\_ALMA\_NR

PNX Field	Version	Source Field	Action	Updated By	Updated Date
display:type	22	Type Field Ind1 Ind2 Subfield	OR- Add single PNX field		
		MARC ECT a	OR- Add single PNX field		
		Type Field Ind1 Ind2 Subfield	OR- Add single PNX field		
		MARC 008	OR- Add single PNX field		
		Type Value	OR- Add single PNX field		
		Constant score	OR- Add single PNX field		
		Type Value	OR- Add single PNX field		
		Constant other	OR- Add single PNX field		
		Type Value			

Go back Save

8. Find the *display:title* section

displaytitle	2	Type	Field	Ind1	Ind2	Subfield	
MARC	130					a,d,f,k,l,m,n,o,p,r,s	OR- Add single PNX field
MARC	245					a,b,f,g,k,n,p	OR- Add single PNX field
Comments							

9. If the page is set to *Basic* view, you will see and *Advanced* button near the top of the screen. Note that the rules below do not have conditions associated with them.

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Normalization Set Editor

Normalization Rules Set: ALMA\_NR Section: Display Field: Title

Normalization Rules for field title in PNX Section display in Normalization rules set ALMA\_NR

Description:  **Advanced**

Action: OR [Enable all rules](#) [Disable all rules](#)

Last Updated By: ExlibrisSupport At: 2016-09-28 15:44:49.0

Comments:

Version: 2

10. If the button reads *Advanced*, click it.

Go to bottom of page

Type	Field	Ind1	Ind2	Subfield	Parameter	Enabled
MARC	130			Include	a,d,f,k,l,m,n	Enabled
Transformation: Copy As Is						
MARC	245			Include	a,b,f,g,k,n,p	Enabled
Transformation: Remove characters from the end /,=						

Go to top of page

Create a New Rule

Create

Go back Save

11. Now the button should read *Basic*, and the rules below will contain all of the information in the rule, including the Conditions. Each time you revisit the normalization rules, you will want to ensure that you are looking at the *Advanced* version of the screen.

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Advanced Normalization Set Editor

Normalization Rules Set: ALMA\_NR Section: Display Field: Title

Normalization Rules for field title in PNX Section display in Normalization rules set ALMA\_NR

Description:  **Basic**

Action: OR [Enable all rules](#) [Disable all rules](#)

Last Updated By: ExlibrisSupport At: 2016-09-28 15:44:49.0

Comments:

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Rule group	display_title	Type	Field	Ind1	Ind2	Subfield	Parameter	Enabled
Source	MARC		130			Include	a,d,f,k,l,m,n	Enabled
Conditions logic: True Conditions relation: And								
Condition 1 - Logic	False							
Condition 1 - Source	MARC		130			Include	9	Match Current
Condition1 - Routines	General Parameter							
Routine: Check that string exists Parameter: N								
Condition 2 - Logic	True							
Condition 2 - Source	MARC		idr			Include		Match Last
Condition2 - Routines	General Parameter							

Go Back Save

**12.** Take a few minutes to examine the rule set. Feel free to click on the dropdowns available within the rules to see the options. As long as you *do not click Save*, you will not be inadvertently editing the rule.

**13.** Feel free to visit other areas of the normalization rule set by selecting the appropriate Section and Fields at the top of the screen. For example, if you wanted to see the normalization rules for Search/Title, you could change the section dropdown to search.

**14.** Return to the Display/Title normalization rule.

**15.** Scroll down to the bottom of the screen

**16.** Ensure the *book1.html* is selected

**17.** Then click *Test*

**18.** A new tab or window will open. Note that the left pane shows the PNX normalized title, while the right side shows the original record.



25. Next to the deploy button, there is a **Test** button. Click **Test** to test the entire rule.

26. Click the **Test** button at the bottom of the screen.

**Note that when you are in a specific normalization rule, the test gives results for the section and field you are currently in. The test rule function here tests the entire rule. This is useful if you are testing a rule that is dependent on data that has been normalization in a separate rule.**

**Configure Test**

TestRecordId default defaultTestRecordId default 0 default	00000nkm a22 a 4500 VM 00000nkm a22 a 4500 20041209091501.0 kh
TestRecordId image Suffragists Mrs. Stanley McCormick and Mrs. Charles Parker, April 22, 1913. Washington : 1913 April 22. Library of Congress Prints and Photographs Division Washington, D.C. 20540 USA 1 photographic print. National Woman Suffrage Association (U.S.)--People--1910-1920; Suffragists--United States--1910-1920; Women's suffrage--United States--1910-1920; Group portraits--1910-1920; Portrait photographs--1910-1920; Photographic prints--1910-1920 Two women holding a banner between them reading "National Woman Suffrage Association." eng default Suffragists Mrs. Stanley McCormick and Mrs. Charles Parker, April 22, 1913. Two women holding a banner between them reading "National Woman Suffrage Association." National Woman Suffrage Association (U.S.)--People--1910-1920. Suffragists--United States--1910-1920. Women's suffrage--United States--1910-1920. Group portraits--1910-1920. Portrait photographs--1910-1920. Photographic prints--1910-1920. 1913 April 22., default defaultTestRecordId image 1871 1873 2054 18710101 18731231 default default Suffragists Mrs. Stanley McCormick and Mrs. Charles Parker, April 22, 1913. 2054 eng 2054 1871 National Woman Suffrage Association (U.S.)--People--1910-1920 Suffragists--United States--1910-1920 Women's suffrage--United States--1910-1920 Group portraits--1910-1920 Portrait photographs--1910-1920 Photographic prints--1910-1920 images images S 1 suffragistsmrsstanlepril221913 1871 suffragistsmrsstanlepril221913 1871 suffragists mrs stanley mccormick and mrs charles parker april 22	bc 041209m18711873ctunnn f000 kneng d Item in LOT 11052-3 Suffragists Mrs. Stanley McCormick and Mrs. Charles Parker, April 22, 1913. Washington : 1913 April 22., Library of Congress Prints and Photographs Division Washington, D.C. 20540 USA. 1 photographic print. George Grantham Bain Collection (Library of Congress). Two women holding a banner between them reading "National Woman Suffrage Association." National Woman Suffrage Association (U.S.)--People--1910-1920. Suffragists--United States--1910-1920. Women's suffrage--United States--1910-1920. Group portraits--1910-1920. Portrait photographs--1910-1920. Photographic prints--1910-1920. PUBLIC