Primo Record Format (PNX)

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Agenda

- Primo Normalized XML (PNX)
- Exercise
What PNX is
• What it is – Primo Normalized XML
• Where it comes from (source data + normalization rule set)

PNX Viewer in Primo Back Office
• After comparing source record, right click and ‘View Source’/‘View Frame Source’ to see full code

PNX in Front End
• Front End (add &showPnx=true to the end of the URL)
• recommend IE (better contrast than Chrome)
PNX – DEMO

PNX Sections

• Control
• Display
• Links
• Search
• Sort
• Facets
• Dedup
• FRBR
• Delivery
• Enrichment
• Ranking
• Addata
• Browse

Exercise #3a

See the PNX Record in the Back Office (your institution)

• Log into the Primo Back Office
• Go to the PNX Viewer
• Enter in the source ID of the record
• See the PNX record and the original record

See handout for step-by-step instructions
Converting Records into PNX

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Agenda

• Normalization Mapping Tables
• Normalization Rule Sets
• Exercise
Normalization Mapping Tables – DEMO

Normalization Mapping Tables Overview
- Used to translate one set of codes to another
- Some are populated by default (Primo software) (customizable)
- Some are populated with information entered from other areas of the system (ILS institution codes, ILS Library Codes) (not customizable)
- List of all mapping tables potentially used (normalization rules define which mapping tables are used and how)

Primo Back Office > Ongoing Configuration > Pipe Configuration > Normalization Mapping Tables

Agenda
- Normalization Mapping Tables
- Normalization Rule Sets
- Exercise
Normalization Rules Configuration – DEMO

Normalization rule configuration
- Using template normalization rules
- Standard changes to templates
  - May want to create a search/searchscope for data source (will also need to create corresponding scope value)
  - Non-Ex Libris ILS systems will also need Availability Enrichment configured

Managing Normalization Rules Overview
- Display template NR checkbox
- Edit, Deploy, Test options

Create a new normalization rule from template

Primo Back Office > Ongoing Configuration > Pipe Configuration > Normalization Rules Configuration

PNX Section Screen
- Entry screen for normalization rules
- Summary of PNX sections for this normalization rule
- Normalization Rules set dropdown (allows you to go to different rule set)
- PNX section dropdown (different PNX areas)
- Display empty PNX fields
- Normalization Rules Set Attributes
- Normalization Rules for PNX Section

Primo Back Office > Ongoing Configuration > Pipe Configuration > Normalization Rules Configuration
Normalization Rules Configuration – DEMO

PNX Field Screen
• Sections of screen
• General information and settings
• Rule (source mapping)
• Create new rule/source mapping
• Testing
• Copy to another set
• Synchronize with template

Primo Back Office > Ongoing Configuration > Pipe Configuration > Normalization Rules Configuration

Normalization Rules Configuration – DEMO

PNX Field Screen – General Information and Settings
• Description
• Basic/Advanced option
• Action
• Enable all rules/disable all rules
• Last updated, comments and version

Primo Back Office > Ongoing Configuration > Pipe Configuration > Normalization Rules Configuration
Normalization Rules Configuration – DEMO

PNX Field Screen – Rules (Source Mapping)

- Rule group
- Source and Configuration XPath
- Enabled
- Conditions (logic, source, routines)
- Transformations (transformation, parameter)
- Action (add, or, merge)

Primo Back Office > Ongoing Configuration > Pipe Configuration > Normalization Rules Configuration

Normalization Rules Configuration – DEMO

PNX Field Screen – Create new source mapping

- How to create
- How to delete

Primo Back Office > Ongoing Configuration > Pipe Configuration > Normalization Rules Configuration
Normalization Rules Configuration – DEMO

How to edit an existing rule set

• Reasons for editing a rule set
• Walk through editing an existing field and testing it (editing characters in #2 rule group)

How to add a new rule to an existing set

• Reasons for adding a new rule to a rule set
• Walk through adding a rule to an existing set and testing (adding subtitle from 245c)

Normalization Rules Configuration – DEMO

PNX Field Screen – Testing

• Select owner and type of source record to test with
• Select record (can also edit this record if needed)
• Test record
• New window/tab opens with PNX result on left, and the original record on the right
Normalization Rules Configuration – DEMO

Copy to another set
- Only available if you have multiple normalization rules for your institution

Synchronize with template
- Applies only to rules on screen, not the entire normalization rule set

Save and deploy
- After testing, Save, Deploy
- Deploying makes the rule set available to pipes

Primo Back Office > Ongoing Configuration > Pipe Configuration > Normalization Rules Configuration

Normalization Rules Configuration – DEMO

How to add a new rule set
- Reasons for adding a new rule set (local fields)
- Different types of local fields (display, links, search, facets)
- Adding a new rule set (display empty fields, use local field)
Exercise #3b

Create normalization rule set, adjust, and renormalize data

- Create a new normalization rule set from template
- Make changes to a normalization rule
- Create a new renormalization pipe (No Harvest) using new rule set
- Deploy
- Renormalize data

*See handout for step-by-step instructions*

Questions?

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Thank you!

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