Configuring Primo Record Display and Search

Adding local fields to your Primo interface

Introductions

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Paul joined the North American Primo Support Team in 2010. Prior to joining Ex Libris, he spent ten years doing distributed application development and support. Paul is an SME on Primo’s APIs.
Objectives and Target Audience

- **Brief Session Description**: This session will cover frequently asked questions about configuring Primo PNX records. We will take a goal-oriented approach to discuss the modification of Primo’s normalization rules. Objectives include creating facets, making fields searchable, and making fields visible to your users. Make the most of your data by leveraging the power of the PNX!

- **Session Objective(s)**
  - By the end of this session you will know, understand and/or be able to:
    - Understand the structure of a Primo PNX record
    - Understand the basics of normalization rules
    - Configure normalization rules to create facets, searchable fields, and more.

- **Session Target Audience**:
  - New and Experienced Customers

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**Agenda**

1. Introduction
2. Adding a local Facet
3. Adding a local display field
4. Adding a local Search field
Introduction: Local Fields in the PNX

In addition to Primo’s out-of-the-box fields, you can define a maximum of 50 local fields in the following PNX sections:

- Display (Ids)
- Facets (lfc)
- Search (lsr)
- Links (lIn)
- Additional Data (lad)
- Enrichment (lrn)
- Sort (lso)

Advantages of Local Fields

- Accommodate the specific research needs of users at your institution
- Offers granularity not provided by out-of-the-box fields
- Tailor your Primo to your local collection

Can an existing field do the job? Why not?
Adding A Local Facet

Types of Facets

Dynamic Facets
- Values for each facet category are derived from values in the facets section of the PNX.
- Generally, facets are dynamic by default.

Static Facets
- Values for each facet category based on a pre-defined list, stored in a mapping table.
- Require additional configuration in code and mapping tables

Top-Level Facets
- Display the in the Show Only section of the brief results page
- Top-level facets appear even if results are found in only one category (such as Available in the library)
General Steps for Facet Creation

1. Configure the facet in the facets section of the normalization rules
2. Configure the facet labels that display in the front end
3. Add the facet in the Views Wizard to enable display of the facet
4. For Static and Top-Level: configure additional code and mapping tables

Adding a Dynamic Facet

Dynamic Facets can have random values, but should be repeatable within a collection

Example: Publisher, Author, Topic
Walkthrough: adding a facet for Publisher

- Publisher should be a dynamic facet because it contains repeating information, but not a “known” list

- First Step: identify a PNX element or field(s) in the source records that contains publisher information

  For instance:
  - display/publisher (an existing PNX field)
  - MARC 260 b

- The specific source field does not matter as long as the data in this field is consistent

Adding a Normalization Rule

This rule uses MARC 260 b as a source and copies the value into the facets/lfc01 field

- Save and Deploy the Rule Set
- Run a No-Harvest (Renorm) pipe to update the records
- Wait for Indexing and Hotswap to complete
Editing the Facet Label

- **Code Table: Facet Labels**
  - Changes the label that displays in the front end

- **Code Table: Facet Code Field**
  - Changes the label that displays in the Back Office Views Wizard

View Configuration

- Adding the new facet in the Tiles Configuration > Brief Display page of the Views Wizard “enables” it and makes it visible in the front end.
- New facet will appear after deploying the view
Facet Appears in Front End

Adding A Static Facet

Static Facets are best when working with a fixed set of possible values

Example: Resource Type, Language, Library
Adding a Static Facet for Video Formats

- Video Formats should be a static facet because the media formats are a known, finite list
- Library has a large collection of audiovisual materials of various mediums: DVD, Blu-ray, VHS, Videodisc, etc.
- Helps users quickly identify materials based on format

Mapping and Code Table Configuration

Add new Static Facet to Static Facets Mapping Table
- Values Table Name and Code Table Name fields are defined automatically by the system
- Save changes

Add facet values to newly created mapping table
- Return to the Static Facets Subsystem page
- Click Sync to propagate the new values to the associated code table

The code table allows for customization and translation of labels that appear in the Front End
- Deploy the code and mapping tables
Mapping and Code Table Configuration

Mapping Table: Static Facets
- Syncing creates code and mapping tables

Mapping Table: local field values table
- Table create by the system, values updated manually

Code Table: local field values table
- Table generated by the system, values copied from mapping table

Normalization Rule Configuration

- For this example, we use MARC field 007 position 4.
- Normalization rule will use the type_007_4 mapping table to map this value to a code
- As with the static facet, save and deploy normalization rule, run the no-harvest pipe, and add the facet in the Views Wizard.
Adding a Top-Level Facet

- Top-level facets are static facets that display in the Show only and Refine My Results sections on the Brief Results page
- Out of the box values: Full Text Online, Available in the library, Peer-reviewed Journals

Walkthrough: Top-Level Facet for Physical Items

- Instead of creating a new local field, add the normalization rule to Facets/Top Level
- Example: top-level facet for physical items
- This rule uses an existing PNX field, delivery/delcategory and checks if the record is a physical item
**Code and Mapping Tables**

**Mapping Table: facet_level_values**
- Contains values for the existing top-level facets
- Edit table and add row for new top-level value
- Sync to update code table

**Code Table: Top Level Facet**
- Configure the display label for the facet value

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**Local Display Fields**
Local Display Fields

- Local display fields are designed to display information that falls outside the scope of the out-of-the-box display fields.
- Example: alternate title, local notes

Walkthrough: adding a display field for General Notes

- A simple normalization rule copies the 500 a field and removes punctuation from the end.
- Save and deploy the rule set, run a no-harvest pipe to update the records
Local Display Fields

Code Table: Front End Display Fields
- Configure a label for the local field

Views Wizard Configuration
- To add the field to the details tab, add it to the Full Display
- To add the field to the brief display (below the record title) add it to the Brief Results

Local Search fields
Local Search Fields

- Local search fields provide the capability to search for information that falls outside the scope of the out-of-the-box search fields.
- Example: publisher, call number, OCLC number

Adding a Search Field for Call Number

- Normalization rule copies 949 d from the source record
- As always, save and deploy the rule set, run a no-harvest pipe to update the records
- Since this is a search field only, no label configuration needed (unless adding the search field to the Basic or Advanced Search Tile dropdowns)
- After indexing completes, records are searchable by call number
Adding a Search Field for Publisher

Publisher is already a display field, so the rule copies the value from the display/publisher PNX section.

Save, deploy, and run the no-harvest pipe.

After indexing completes, records are searchable by publisher.

Adding a Search Field to the Advanced Search

**Code table: Advanced Index Fields**
- Add label for local search field
- Deploy code table

**View Configuration**
- Views Wizard > Tiles Configuration > Home Page > Advanced Search
- Edit complex search lines to include new search field value
- Deploy the view
Front End Functionality

Publisher appears in Advanced Search Dropdown and searches the newly-defined local field exclusively.

Next Steps and Support Resources

• Customer Knowledge Center guides and articles
  • Adding a Facet for Video Formats
  • Adding a Searchable Field
  • How To add a searchable resource type to Primo
  • New Top level facet is not created

• 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)
Q & A

Any Questions?

Session Survey Evaluation

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