Introductions

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Objectives and Target Audience

• Brief Session Description:

This session will cover strategies and methods to assist with customizing the New Primo UI. Included in this session will be best practices, code examples and hands on exercises that focus on customizing the new Primo UI interface. It is recommended that participants come to the session with a laptop in order to follow along with the hands on exercises.

• Session Objective(s)
  • By the end of this sessions you will know, understand and/or be able to:
    • Upload and Apply a Customization Package Using the Primo Back Office
    • Learn about new changes in the Primo Back Office Relevant to the New UI
    • Learn how to use the Gulp Environment to test changes locally

• Session Target Audience:
  • All customers, both new and experienced
  • Systems and Web Librarians
  • Administrators
  • Developers

Agenda

1. Back Office Overview
2. The Customization Package
3. Using the Gulp Environment
4. Helpful Tips
5. Next Steps, Support Resources and Survey
Back Office Overview

Changes to the Back Office related to the new UI

Back Office activation for the New Primo UI

- To direct users to the New UI, it has to be activated in the BO
- New UI can be activated per view by going to: Primo Home > Ongoing Configuration Wizards > Institution Wizard > Edit
BO features not in use by the New UI

Views Wizard

Ongoing Configuration Wizard > Views Wizard > Edit View Attributes

- Session timeout URL
  Home page will be always displayed after the session timeout

- Layout Set – included with the Customization Package

- CSS and Mobile CSS - controlled via the CSS in customization package
Basic Search Tile
Views Wizard > Tiles Configuration > Edit Basic Search Attributes

• Media Type pre-filter drop-down

• Search operators

Basic Search Tile
Views Wizard > Tiles Configuration > Edit Basic Search Attributes

• Search Target Fields

For the New UI, Resource type pre-filter drop-down, Search Operators and Search Target Fields of Basic Search tile, only available in the Advanced search
• E-Shelf – will always appear in the New UI, unless removed with the CSS.

• Define link from title – it is hardcoded for the NUI and will always open the Full Display of the record

• Order of tabs - GetIt1 and locations are combined under the Get It section in the new UI.

• Facebook – not planned to be included in the New UI, yet.

• Number of records – in the New UI records are loaded in the bulk of 10.
Refine My Results (facets) Tile

- Display "Show only" facets on the top of the brief results list – unavailable in the New UI

Additional functionalities

- Display "Show only" facets on the top of the brief results list
- Display "Show only" facets on top of "Refine By Results"
- Display "RSS", "Save Search" and "Add page to e-Shelf" on top of the facets options

Added for the New UI in the BO
• Define Sign-in message (in new UI)

Front End

• Sign in message disabled
Mapping Tables - Availability/Service Link column

- GetIT! link 1 Configuration

Availability/Service Link field

- Indicates how the system should handle the availability links on the Brief Results page, and the display of the services, which may display on the Full Display page or a new page.

- The structure of the field:

  <availability>@@<service_link>

  <availability> - open a new page or display the Full Display page. The valid values are:

  **Out** – The availability link directs to an external link on a new page.

  **Full** – Used for Alma only to open the full display page with focus on the Alma’s Get It 1 service.
Availability/Service Link field

**OvL/OvP** – This option allows the system to determine automatically whether your environment is using OvP or OvL.

- **OvL** - an external link to the OPAC opens on a new page.
- **OvP** - the record's full display opens with focus on the Get It 1 service. The <service_link> parameter is not in use for this option.

**SP** – This option is used internally for use with the Alma Services page.

**bX** – This option is used internally for use with bx recommendations.

<service_link> – indicates whether to display Alma's mashups, force Alma to display full text, or display links to the external sites.
The valid values are:

- **activate** – Required by Alma to display the mashup or force display of full text.
  Use Full@@activate to open the Alma's mashup in the record's full display, or use Out@@activate to force Alma to display full text on a new page.

- **display** – For all other online categories, specify this value to display the links to the external sites. For example: Out@@display
Availability/Service Link field

• Full Activate

After clicking on “Online Access”

Availability/Service Link field

• Out Activate

Click on “Online Access”
Customization Package

• The Customization Package Manager allows you to upload and manage customization packages, which allow you to brand and further customize the Primo UI. For more information on the tool, see [UI Customization Package Manager](#).

• To ensure that a customization package integrates properly with Primo, the package must contain the following folders:
  • CSS
  • HTML
  • JS
  • Image
Customization Package Content

- **css** – This folder contains the `custom1.css` file, which is where you can include your CSS rules. These rules will override corresponding rules in the default CSS.

- **img** – This folder contains all customized images for the new Primo UI. To ensure that the correct image appears in the Primo UI, make sure that you use the same file name as the original.

- **html** – This folder contains all customized HTML files for the new Primo UI. The `home_en_US.html` file allows you to customize the area of the page below the search box on the Primo Home page.

UI Customization Package Manager

Primo Home -> Primo Utilities -> UI Customization Package Manager
Downloading a Package

- You can download a blank template, or the current customized template

![Download a Package](image)

Basic Steps

- Unzip the ZIP file.
- If using the template file, change the name of the root folder to your view’s code.
- Add your customized images and CSS. You must retain the file structure and names of files that you are overriding.
- Once customizations are complete, Zip the Configuration package folder (recommended to use 7Zip)
- Open the UI Customization Package Manager (Primo Home > Primo Utilities > UI Customization Package Manager).
- Select the View Code that you want to customize.
- In the Upload package section, click Choose File to select the zipped package that you just created or modified for that view and institution.
Customization Package – Images

- Any of the out-of-the-box images can be customized by creating or modifying a view’s package, placing the customized image under the img folder, uploading the updated package to the server, and then deploying the package.

Here are some of the commonly customized images for the purpose of branding:
- library-logo.png – Contains the library logo.
- favicon.ico – Contains the favicon.
- icon_<resource_type>.png – Contains the image for the specified resource type <resource_type>. For example: icon_audio.png

Customization Package – Images

- The logo file must be named library-logo and must be of filetype – PNG

- Resource Type Icons must be named accordingly.
  - icon_<resource_type>.png
Gulp Environment

Using the Gulp Environment and Recipes

• We have sent our instructions ahead of the Session, and will try to go through several tasks together.

• The Gulp Environment is available on GitHub which also contains instructions on how to install the environment

• We have setup instructions on how to install the environment which are available as a separate electronic document
### Gulp – Getting Started

- The Gulp environment is available to all users and can be run from a command line, or terminal if on a Mac.
- The Gulp Environment allows for testing and customizing locally on your own machine, and does not affect the Production environment.
- In order to connect to your Primo Environment, you will need to include a Primo Url in the config.js file, and a corresponding View Code must be present on the server.
- You can use the Gulp Environment to test changes locally and create a zip package. You will still need to connect to the Back Office in order to upload a Customization Package and Deploy the change.

### App-Colors

One available Gulp Command is App-Colors. This allows for identifying 5 primary colors to be used that is then output to a CSS file and is applied to your Primo Environment.

- There is a colors.json file that can be updated to include the 5 color components.

```json
{
    "primary": "#53738C",
    "secondary": "#A9CDD6",
    "backgroundColor": "white",
    "links": "#5C92BD",
    "warning": "tomato",
    "positive": "#0f7d00",
    "negative": "gray",
    "notice": "#e08303"
}
```
Setting up the View Folder

- You will also need to have a template folder present in the primo-explore\custom folder. The template folder will need to be renamed to the name of the View being edited.
- You can include multiple view code names in this folder

Running the Environment

- At this point, you should have the environment installed and the config.js file should be pointing to the environment you will be working on.
- A View folder should exist in the primo-explore\custom folder
- Open a Command Terminal Window and cd to the root directory where Gulp is installed
Gulp Run Command

• Run the following command and watch the magic happen

Gulp run -view NAMEOFYOURVIEW

Upon Success you should see the following:

View in your Browser

• To view the environment in your browser, go to the following url

http://localhost:8003/primo-explore/search?vid=YOURVIEWCODE
App-Colors CSS

- There is a gulp command available that can run a sweeping change across your Primo Environment, applying Base colors and gradients all at once.

- It applies colors based on a json file located at the root of your gulp environment directory to a new file in your CSS folder, app-colors.css
Steps to Run App-CSS

• Open the colors.json file in the root of your view folder and make any changes

• cd to the project base directory (C:**\primo-explore-devenv)

• Run gulp app-cs --view <your-view/folder code> for example: gulp app-cs --view YOURVIEWCODE

• A new file will be created on your package css directory named: app-colors.css

App-CSS – VERY IMPORTANT!!!

• After running app-cs, it places a new file called app-colors.css in the CSS folder of your View
• When you run the gulp run --view ViewCode command, this will replace the contents of custom1.css with any and all css files contained in the css folder

• !!This means if you have custom css in the custom1.css, this file will be overwritten and you will lose any changes
• It is recommended that you create a separate css file for other customizations and place it in this directory – Example: VIEWCODE.css
• By doing this, when you run the gulp command, all files will be concatenated together into custom1.css
Changing Resource Type Icons

- Try replacing resource type icons in the images folder.

- A good resource for icons is https://thenounproject.com/

- Download an icon of your choice for book, rename it to icon_book.png and place it in the images folder

- Run the gulp environment command to see your changes
gulp run --view ViewCode

- Try adding a different image
Creating a Clickable Logo Image – Part 1

In the View’s package, add the following CSS

```css
/* Call the clickable logo */
prm-logo div.product-logo {display:none;}
prm-logo div.product-logo-local {
    display: flex;
}
prm-logo .logo-image, prm-logo img {
    max-height: 35px;
}
```

Creating a Clickable Logo Image – Part 2

In the View’s package, add the following to custom.js

```javascript
// Add Clickable Logo
app.controller('prmLogoAfterController', [function () {
    var vm = this;
    vm.getIconLink = getIconLink;
    function getIconLink() {
        return vm.parentCtrl.iconLink;
    }
}]);
```

```javascript
app.component('prmLogoAfter', {
    bindings: {parentCtrl: '<'},
    controller: 'prmLogoAfterController',
    template: '<div class="product-logo product-logo-local" layout="row" layout-align="start center" layout-fill id="banner" tabindex="0" role="banner">' + '<a href="[target's_URL]"<img class="logo-image" alt="{{nui.header.LogoAlt | translate}}" ng-src="{{$ctrl.getIconLink()}}"/>
</a></div>
');
});
```
# Move Facets to the Left

Add the following lines to the custom1.css file:

```css
prm-search > md-content.padded-container-primoExplore-theme {
  display: -webkit-flex; /* Safari */
  -webkit-flex-flow: row-reverse wrap; /* Safari 6.1+ */
  display: flex;
  flex-flow: row-reverse wrap;
}
.flex-gt-md-25.sidebar{
  webkit-flex: 0 0 15%;
  flex: 0 0 15%;
}
.main{
  webkit-flex: 0 0 65%;
  flex: 0 0 65%;
}
.layout-row>.flex-gt-lg-10{
  webkit-flex: 0 0 16%;
  flex: 0 0 16%;
  max-width: none;
}
```

# Move Paginator to the Right

- Add the following to custom1.css:

  ```css
  /**---Move Pagination to the Right----*/
  
  .__gt-xs prm-page-nav-menu {right: .5em;}
  .__gt-md prm-page-nav-menu {
    bottom: 1.5em;
    right: 1em;
  }
  
  prm-page-nav-menu {
    position: fixed;
    z-index: 11;
    bottom: 4.75em;
    right: 0;
    left:auto !important;
  }
  ```
**Hide Virtual Browse**

Add the following to custom1.css

```css
/*CSS to Hide Virtual Browse and Virtual Browse Button/link on Full Display */
#virtualBrowse {display:none;}
button[aria-label="Virtual Browse"]{display:none;}
```

**Re-Order Library Card | Sign Out Navigation**

Add the following to custom1.css

```css
/*re-order My Library Card and Sign in/out links */
.md-toolbar-tools .md-fab-action-item:nth-child(1) {position:absolute;right:300px;top:0;}
.md-toolbar-tools .md-fab-action-item:nth-child(2) {position:absolute;right:150px;top:0;}
.md-toolbar-tools .md-fab-action-item:nth-child(3) {position:absolute;right:0px;top:0;}
```
Replace Magnifying Glass Icon

Add the following to custom1.css

```css
#magnifying-glass {display:none}
.search-actions button[aria-label="Search"]
{
    background-size: 70px
}
```
Some Tips

• When creating the ZIP file of the customization package, we recommend using 7Zip
  • http://www.7-zip.org/download.html

Next Steps and Support Resources
Support Resources and Further Reading

• **New UI Best Practices**

• **Packages Created by Customers:**
  • [https://www.npmjs.com/search?q=primo-explore&page=2&ranking=optimal](https://www.npmjs.com/search?q=primo-explore&page=2&ranking=optimal)

• **GitHub Repositories**
  • [https://github.com/search?utf8=%E2%9C%93&q=primo-explore](https://github.com/search?utf8=%E2%9C%93&q=primo-explore)

Q & A

Any Questions?
Session Survey Evaluation

Please use the following link <insert here> to provide feedback on your sessions.

THANK YOU