Introductions

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Maxine joined the North American Support Team in 2013 and specializes in Primo configuration. She received her Masters of Library and Information Science from the University of Illinois Urbana-Champaign.

• Matt Warnock

Matt joined the Primo Support Team at the end of 2014 and has recently transitioned to the Customer Success Team. He has worked in both public and academic library settings. He has a MLIS from the University of Illinois at Champaign-Urbana.
Objectives and Target Audience

• Brief Session Description:

This session explores configuration of resource types in Primo and provides a framework for customizing Primo's defaults to the needs of your library. We will discuss PNX elements related to resource type and demonstrate how to align your e-books with Primo Central books. You will also get a tool to help manage your resource type mappings.

• Session Objective(s)
  • By the end of this sessions you will know, understand and/or be able to:
    • Understand how resource types work in Primo
    • Understand the difference between resource types for Primo Central and local Primo records
    • Configure custom resource types for your institution.

• Session Target Audience:
  • New and Experienced Customers

Agenda

1. What are resource types in Primo?
2. Resource types in the PNX
3. Why add a new resource type?
4. Configuration Steps
5. Example: Aligning Primo Central and Local ebooks
What is a Primo Resource Type?

Which Resource Type?
The “resource type” in Primo is a set of separately configurable PNX elements
- These elements may or may not align; they have no inherent relationship

Set of over 20 out-of-the-box resource types covers most common formats
- These pre-defined types are also used by Primo Central

New types can be added based on the needs of your library, but for local resources only
- Primo Central records have assigned PNX elements for resource type that cannot be changed
Key PNX elements for Resource Type

Display/type corresponds to the icon next to the record
Facets/rsrctype corresponds to the material type in facets area
Facets/prefilter corresponds to the advanced search dropdown

Honorable Mentions

search/rsrctype

- a search for the resource type will yield search results based on this section
- Example: search for “Libguides” and see libguides in the result set

addata/rystore  addata/format  addata/genre

- Used to populate the openURL used for delivery of electronic resources
- Used in the Actions menu for Export RIS, RefWorks, etc
A Look at the PNX

• Since the PNX elements are separately configurable, resource type values may vary between PNX sections.

Why add a new resource type?
Why add a new resource type?

- Represent local collections that don’t fit the pre-defined types
- Add granularity

- Examples:
  - Distinct resource types for audio and video formats
  - Distinct resource type for libguides/research guides
  - Unusual collections like action figures or miniature books

Problem: Video formats are not specific

- Searching for a video title doesn’t provide immediate information on format
- Users want to know immediately whether the video can be played on their device

No indication if the video is DVD, VHS, or something else
Problem: No resource type facet after pre-filtering

- Since all audio visual materials have the facets/rsrctype “media” the resource type facet doesn’t display after applying audio visual pre-filter

Objectives

Goals for new Video Format resource types

- Individual records display specific format (DVD, Blu-ray, etc)
- Facet values also display specific format
- Pre-filter dropdowns show the more general type “Audio Visual” that contains all relevant formats
Configuration Steps

Walkthrough: adding a new resource type

• First Step: identify field(s) in the source records that can be used to identify the resource type
• For my data source, I used MARC 007 position 4 for videorecording format
• The specific data source doesn’t matter, as long as it can be used to consistently identify the resource type
• Normalization rule:

<table>
<thead>
<tr>
<th>Rule group</th>
<th>Source</th>
<th>Field</th>
<th>Ind1</th>
<th>Ind2</th>
<th>Subfield</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>MARC</td>
<td>007</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Conditions: No conditions specified

Transformations

<table>
<thead>
<tr>
<th>Transformation</th>
<th>Parameter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take incoming</td>
<td>40@1</td>
</tr>
<tr>
<td>Use mapping table</td>
<td>type_007_x</td>
</tr>
</tbody>
</table>

Definer

Action: OOR
Example: Resource Types for Video Formats

- My rule uses a mapping table I created for video formats.
- Normalization rule will check character at 007 position 4 and copy the targetCode to display/type

All Mapping Tables > Normalization Sub System > Create a new Table

Other Normalization Mapping Tables

Mapping Table: format_mean
- Used to define the resource type filter in the Facets section.
- Add a row for the new resource type

Mapping Table: pre_filter
- Used to define the prefilter facet in the Facets section.
- Add a row for the new resource type
Static Facets Mapping Tables

Mapping Table: facet_rtype_values

- Defines the facet value for static facets
- Resource Type is a static facet

<table>
<thead>
<tr>
<th>DVDs</th>
<th>dvds</th>
</tr>
</thead>
<tbody>
<tr>
<td>VHS</td>
<td>vhs</td>
</tr>
<tr>
<td>Laserdiscs</td>
<td>laserdiscs</td>
</tr>
<tr>
<td>Blu-ray Discs</td>
<td>blu-rays</td>
</tr>
<tr>
<td>Patents</td>
<td>patents</td>
</tr>
<tr>
<td>Comics</td>
<td>comics</td>
</tr>
<tr>
<td>Rare Book</td>
<td>rare_books</td>
</tr>
</tbody>
</table>

Mapping Table: facet_pfilter_values

- Defines the facet pre-filter values.
- Populates the Basic Media Type code table and the media types on the Basic Search tile in the Views wizard.
- Since the normalization pre_filter table maps all video formats to audio_video, no changes are needed for this table

Code Tables

Code table: Facet Resource Type

- Defines the display label for facet values that appear in the refine my results panel
- Can be used to translate the code to other languages

Code Table: Icon Codes

- Determines the text beneath the item’s resource type icon
Completing the Process

Deploy all mapping and code tables

Run a No-Harvest Pipe to renormalize data. Index and Hotswap

Configuration Tips

Source code in pre_filter table must equal the value in display/type

Code and mapping tables should maintain consistent capitalization and singular/plural values across resource types

Mapping tables often have corresponding Code table

Example: facet_rtype_values → Facet Resource Type
Customizing the Resource Type Icon

- Unless otherwise configured, custom resource types will use the book icon
- Upload new icons and reference them in your custom CSS file

File Uploader + CSS changes

Add the following to your CSS file:

```css
.EXLResultMediaTYPEdvd
 .multipleCoverImageContainer
 {background-image:
 url('./icon_dvd.jpg');}
```
Example: Aligning Primo Central and Local ebooks

Primo Central Resource Types

- Primo Central has no concept of physical books, so uses resource type “book” for electronic books
- Most local collections use resource type “book” for physical books
- This can cause confusion and issues with faceting
- Solution: customize resource type for physical books
Normalization Rule

- Assigns type “pbook” to all physical resources that would otherwise be “book”
- Electronic books receive resource type “book” to match Primo Central ebooks
Improved Facet Behavior

Faceting by Physical Books no longer returns Primo Central e-books

Faceting by e-books returns local and Primo Central e-books

Next Steps and Support Resources ***to fill in***

- Additional information on setting up Resource Types in Primo:
  - Resource Types - All You Need to Know
  - How to add a searchable resource type to Primo
  - Preventing FRBR Groups Based on a Resource Type

- 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)
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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