

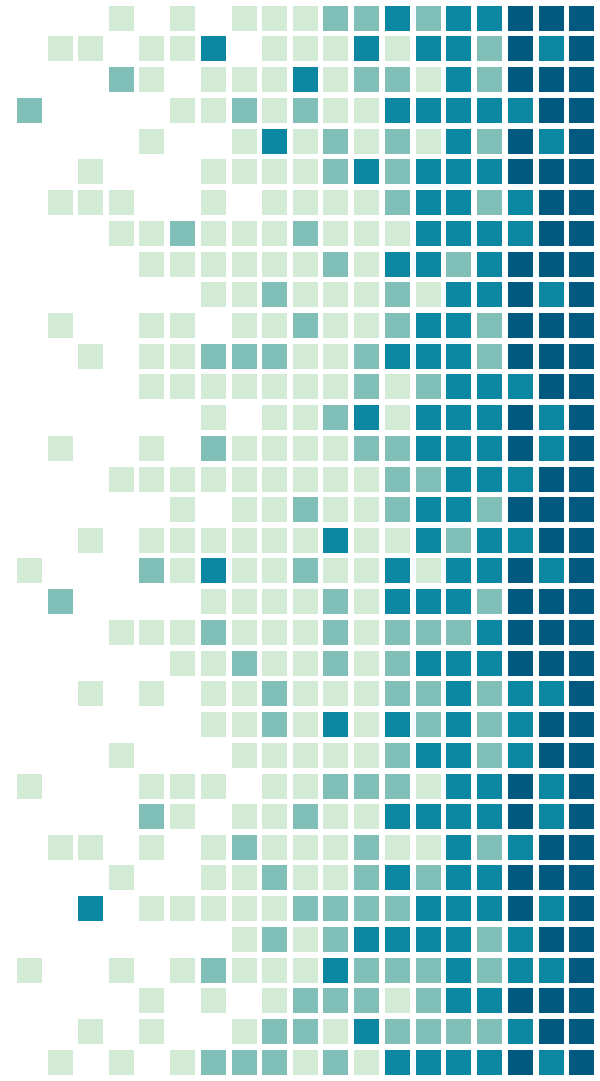
ANZREG Best Practice Day

Primo VE & Primo BO Panel

Overview

- About us
- About BO and VE
- Advantages & challenges
- Development updates
- Some example config

Please ask questions throughout



UQ



- Campuses: St Lucia (main), Gatton, Herston
- Libraries: St Lucia (7), Hospitals / Health (3), Rural & Research (8), Gatton + Warehouse
- Community: Students: 52,331, Staff 6,607 FTE, Extramurals 5,300
- Library staff: 218 FTE
- Collections: 2.4 million monos & 148,000 serials
- Alma AP01 and Primo MT APAC01
 - Classic UI June 2016 > New UI June 2017

RMIT



- 5 sites in and around Melbourne; 2 sites in Vietnam
- 190+ FTE Library staff
- RMIT Student figures 2017 80,000+
- Collection figures 108,424 serial titles ;
949,760 non-serial titles
- System details:
 - Alma 2013
 - Primo TC 2012; Primo MT 2013
 - Primo New UI implemented 30 Jan 2017

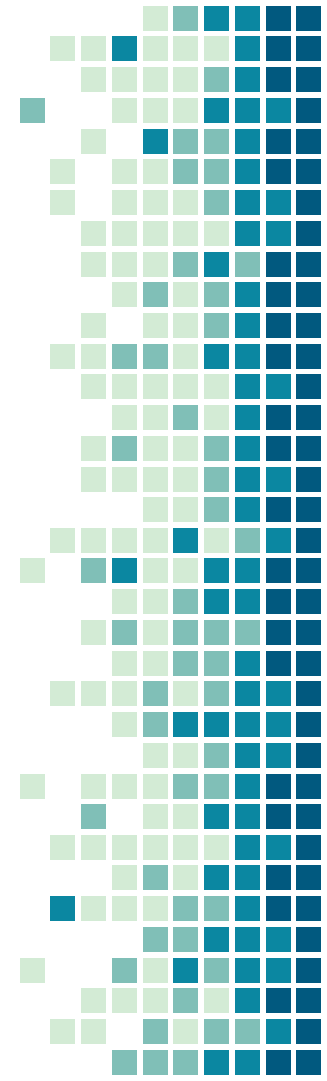
UWA



THE UNIVERSITY OF
**WESTERN
AUSTRALIA**

- Six subject libraries
- 1, 854, 000 Monos 230, 000 Serials
- 24, 161 Students; 3, 558 FTE Staff
- 50 FTE Professional Library staff

- Primo BO MT/Classic UI 2010-2017
- Alma 2014
- Primo VE/New UI (live 15th February 2017)
- Leganto 2018



SCU

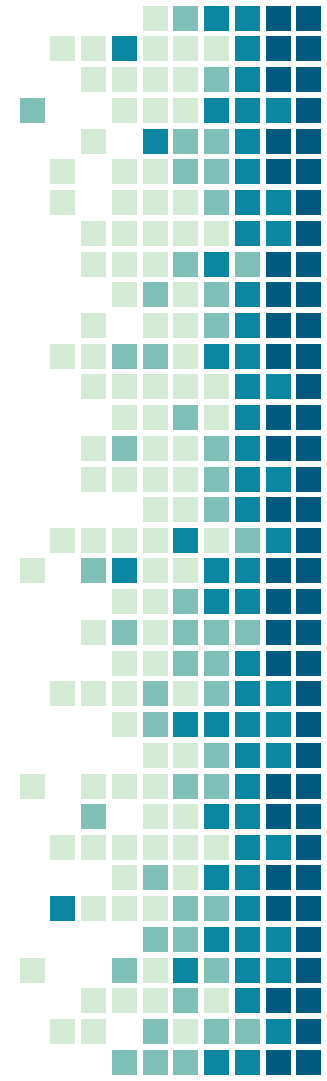


- 3 Libraries spanning from Coffs Harbour to the Gold Coast. Main campus Library at the Lismore Campus.
- 208,415 non serial titles held 90,024 serial titles
- 36 FTE staff across the 3 campus libraries
- Student figures as at 2017: 10,231 EFTSL 4,122 external students
- Went live with our own Alma and Primo VE (AP01) instances in late November 2017
- Previously part of UNILINC consortia so with Exlibris since 2002
- Very much out of the box implementation

Flinders



- 4 Libraries.
- 67 FTE library staff (see below).
- Flinders Student figures 2017 25,560+ Staff: 2,480+
- Collection figures 2017: Serial titles: 53,000+ Non serial titles: 732,000+
- Major Uni restructure Q3 2017 Q1 2018.
- System details:
 - Primo MT- Voyager initially
 - Alma Dec. 2013 (11/12/13)
 - Primo New UI 'Go Live' Dec. 2017
 - Leganto- Gradual Rollout From Dec. 2017 still in 'pilot' mode. Moodle is our LOMS (learning objects).



Terminology

The running joke: What does “VE” mean?

BO / VE--- aka configuration

Classic / New-- aka Front End

MT / TC / Local-- aka instances or environments



Similarities and Differences?

- Both:
 - UI: New UI frontend and customization package
 - PCI Activations interface
 - RTA and Link Resolver
- Primo BackOffice
 - Configuration via both Alma (or other inventory system) and Primo
 - Separate Alma and Primo environments
- Primo VE
 - Configuration via Alma
 - Single VE environment



Primo BO Advantages & Challenges



Advantages

- 3 month release schedule allows for settling in, comms, confident staff
- Many config elements are just 'tick a box'
- Critical mass of community experience and knowledge sharing / developer community
- Salesforce support is familiar
- Pretty well established and comprehensive documentation
- 'Complete' product
- Troubleshooting tools such as debug and PNX on the FE and Systems Tests in the BO
- Extensive customization options

Challenges

- 3 month release schedule means you might have to wait longer for fixes
- Complicated and confusing BO, especially for MT ie some config elements are a mix of code tables, mapping tables, norm rules, and views
- Error prone BO eg MT drift
- Configuration split between Alma and Primo. Sometimes one, sometimes the other, and something both
- Batch processing and hotswap ie no real time display changes
- No PCI / Alma integration for local physical resources to remote citations

Primo VE Advantages & Challenges

Advantages

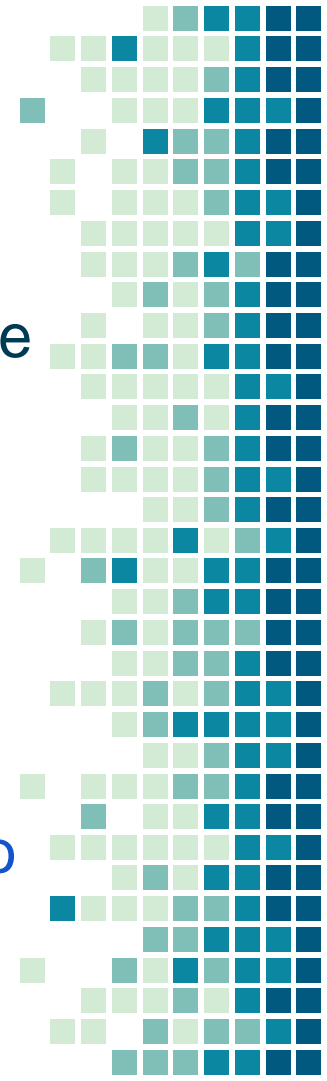
- Streamlined, real time publishing
- Linked Alma and Primo Sandbox
- Consolidation of systems
- Easy, task oriented workflows
- Continuous improvement
- Instant UI configuration and customization
- Common customizations are now built in or easy to do
- Same Customization package as Primo BO

Challenges

- Small user group
- Salesforce experiences
- Monthly releases
- Primo Roadmap/Development Cycle
- Relative lack of documentation (improving)
- Limited customization complexity (improving)
- Troubleshooting tools (improving)
- Alma outages = Primo outages

Rollout of Primo VE

- ANZREG 2017: 1 live customer, 4 about to go live
- ANZREG 2018: 36 live institutions, 100+ in implementation (including a few consortia)
- New Alma Primo customers are implementing Primo VE
- Existing Primo customers can express interest to move, 11 early adopters are implementing soon.
- [“Frequently Asked Questions from Existing Primo Customers”](#) - Primo VE Documentation



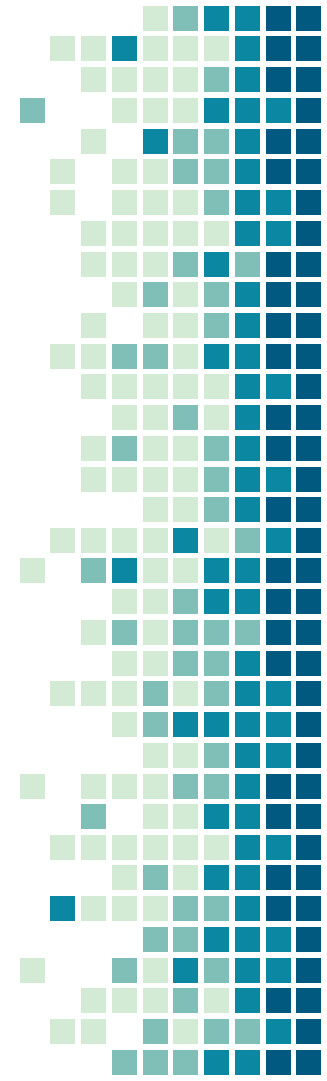
Primo configuration tasks

Let's take a look at how we do things in Primo BO and how we do things in Primo ME



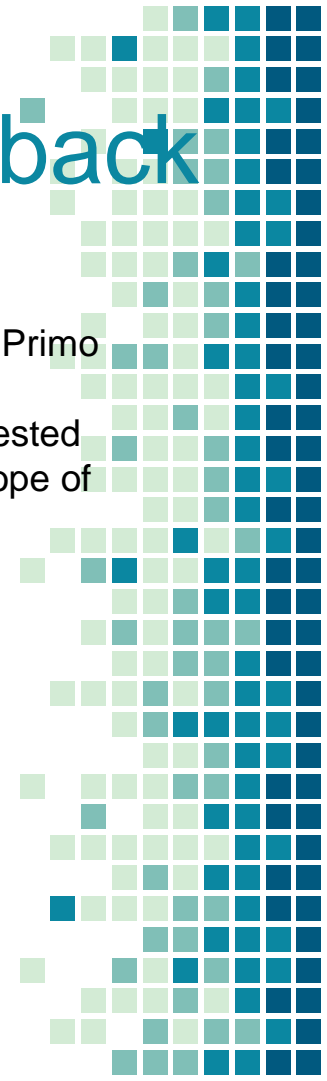
Listserv querywhat you asked

- Bond:
 - I'd like to see how having Primo analytics in Alma can be better leveraged – are there new ways this can be used compared to accessing them from the Primo back office, and is there any reduction in what can be done with them by having it integrated
- UNSW:
 - Personally, I'm not very familiar with Primo VE or BO, apart from a very quick read through of Exlibris documentation. The [FAQ section on Primo VE](#) notes that when Primo VE is coupled with the new Primo UI, libraries will benefit from an “Enhanced user experience” . Our Library will soon be moving to Primo new UI, so I would be interested to know what enhanced user experience means in reality here (if that fits in the scope of your discussion).
- RMIT:
 - 1) How much do you test your Primo instance with each release? For example: Do you test everything or just new features? Do you test on different devices and browsers? What is your reasoning for how much or how little testing you do?
 - 2) (this is more directed towards Primo VE) how do you customise the metadata and fields (such as including or excluding fields from display) in the details section of the Primo full record view.



Configuration based on user feedback

- Question from UNSW:
 - Personally, I'm not very familiar with Primo VE or BO, apart from a very quick read through of Exlibris documentation. The [FAQ section on Primo VE](#) notes that when Primo VE is coupled with the new Primo UI, libraries will benefit from an “Enhanced user experience” . Our Library will soon be moving to Primo new UI, so I would be interested to know what enhanced user experience means in reality here (if that fits in the scope of your discussion).
- Usability testing
 - Making changes based on this
- Simple: Labels
- Medium: Facets
- Complex: customization package eg CSS, live chat, stackmap, widgets



UX- UWA

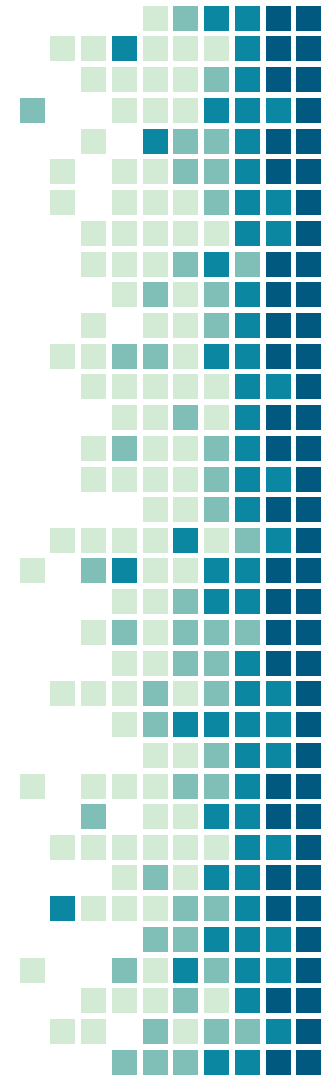
Primo VE

- Real Time Publishing
- Instant Configuration Changes
- Improved Record/Availability display

New UI

- Device friendly
- Streamlined/less cluttered interface
- Easy customization (for the most part)

- Accessibility concerns
- 10 results
- Perceived slowness



Listserv topic: Maintenance / Testing



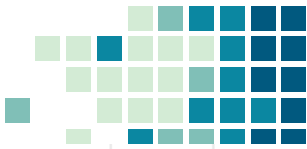
Question from RMIT

1) How much do you test your Primo instance with each release? For example: Do you test everything or just new features? Do you test on different devices and browsers? What is your reasoning for how much or how little testing you do?

Maintenance / Testing @ MITs notes

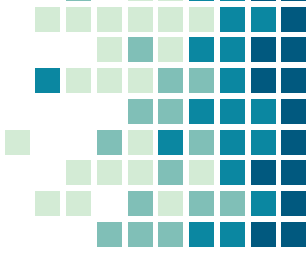
- Thorough testing with each Primo release (quarterly)
- Manual testing because I want to get the user experience of doing each action. There are some things I notice (such as a CSS change or tweak) that an automated test wouldn't notice.
- Test suite of currently 180 items to test. This grows with features from new releases added. The overall test suite is reviewed each year.
- Desktop is tested every time. Favour testing on Chrome latest version, Chrome is RMIT preferred browser and the most used (based on device usage stats)
- Stats: 93% of 2018 usage (thus far) on laptop/PC; 72% of browser usage is Chrome
- Device testing (phone android, and ipad) done only when time allows





7												
8		Testing values/examples	SB Feb 2018 outcome	Passed SB Feb testing? Y/N, date	Feb notes	Prod Feb 2018 outcome	Passed Prod Feb testing? Y/N, date	SB May 2018 outcome	Passed BS May testing?	Prod May 2018	Passed Prod May testing?	SB Aug 2018
9	System details		Windows Desktop Chrome Version 63.0.3239.132 (Official Build) (64-bit)			Windows Desktop Chrome Version 63.0.3239.132 (Official Build) (64-bit)	Y, 06022018	Windows desktop Chrome Version 66.0.3359.139 (Official Build) (64-bit)		Windows desktop Chrome Version 66.0.3359.170 (Official Build) (64-bit)		
10	Searches											
11	Simple	search for cats	Returns 656,130 Results	Y, 24012018		Returns 660,736 Results	Y, 06022018	708,704 Results returned	Y,01052018	710,399 Results returned	Y, 14052018	
12	Advanced	search for cats AND title contains twelve	Returns 2,031 Results	Y, 24012018		Returns 2,045 Results	Y, 06022018	2,122 Results returned	Y,01052018	2,149 Results returned	Y, 14052018	
13	Post search											
14	Limit with single facet	Limit by article	Spot checked results are articles	Y, 24012018		Spot checked results are articles	Y, 06022018	Spot checked results are articles	Y,01052018	Spot checked results are articles	Y, 14052018	
15	Limit with multiple facets	Limit with tick box and select apply filters	Spot checked results match filters selected	Y, 24012018		Spot checked results match filters selected	Y, 06022018	Spot checked results match filters selected	Y,01052018	Spot checked results match filters selected	Y, 14052018	
16	Limit with persistent facet	Persistent facets are selectable and remain when running a new search	Spot checked results match filters selected	Y, 24012018		Spot checked results match filters selected	Y, 06022018	Spot checked results match filters selected	Y,01052018	Spot checked results match filters selected	Y, 14052018	
17	Get It	Check RTA for print resource	RTA displays	Y, 24012018		RTA displays	Y, 06022018	RTA displays. Note: View Map CSS is white instead of Blue	Y,01052018	RTA displays. Note: View Map CSS displays correctly.	Y, 14052018	
18	View It	Check for Electronic resource	eRes availability displays	Y, 24012018		eRes availability displays	Y, 06022018	eRes availability displays	Y,01052018	eRes availability displays	Y, 14052018	
19	View It (digital)	Check for Digital resource	Digi res display correctly	Y, 24012018		Digi res display correctly	Y, 06022018	Digi res display. Note changes to link display for restricted access material with Alma May release case #00547588	Y,01052018	Digi res display. Note changes to link display for restricted access material with Alma May release case #00547588	Y, 14052018	
20	View It (external)	Check for external resource (subject guides)	Link to RMIT Library Subject Guide	Y, 24012018	Note on live links displays as Link to Online Resource instead of Link to RMIT Subject Guide. Updated norm rules on prod.	Link to RMIT Library Subject Guide	Y, 06022018 (with follow up see notes)	Link to RMIT Library Subject Guide displays	Y,01052018	Link to Online Resource displays	Y, 14052018	

Screenshot of RMIT testing suite



Monthly Release Test Plan

Alma Release:	Test Designed by: Lorraine	
	Last Revision date: 14.05.2018	
Test Conditions:	Chrome Test	Firefox Test
Sandbox Test Executed by:		
Sandbox Test Execution date:		
Production Test Executed by:		
Production Test Execution date:		
Device:	PC	PC
Browser:	Chrome	Firefox
On Campus/ Remote:	On Campus	On Campus

Test Title	Test Summary	Test Steps	Expected Result	Sandbox		Production	
				Actual Result (if different from Expected)	Status	Actual Result (if different from Expected)	Status
Authentication	Tests that authentication is working correctly	<ol style="list-style-type: none"> 1. Click Sign In 2. click Sign in to OneSearch. Confirm two sign in options display 3. Select UWA Campus Card users and sign in with your Pheme 4. Confirm OneSearch home Page displays and your name appears in top right corner 5. Click your name, My Library Account and Sign Out display 6. Click Sign Out 7. Confirm OneSearch home Page displays and "Sign In" 	<ol style="list-style-type: none"> 1. Clicking "Sign In" produces two options - My Library Account and Sign Into OneSearch 2. Clicking Sign into OneSearch produces two sign in options that are clearly labeled as UWA Campus Card users and non-UWA Campus Card users 3. Able to correctly authenticate using Pheme and log in 4. Confirm OneSearch home Page displays and name appears in top right corner when signed in. 5. Clicking your name produces the two options of My Library Account and Sign Out 6 and 7. Able to successfully sign out using the Sign Out option 				
home Page display and links	Tests that all aspects of the home page (excluding the search box) are displaying and working correctly	<ol style="list-style-type: none"> 1. On OneSearch homepage view page below the search window. 2. Test all links on left of page by clicking each one. 3. Click video, pause once confirmed video plays 4. Click "More Videos" link 5. Hover over social media icons, click each icon 6. Review home page in general: check for glaring format issues, missing text, unexpected colours etc. If required compare home page to either Sandbox/Production versions 	<ol style="list-style-type: none"> 1. Content is in two columns: List of links is on left of page, video and Social media links are on the right. 2. All links work: new windows open and user is taken to appropriate page/content for the link (eg "OneSearch FAQs" opens the OneSearch FAQs in the OneSearch LibGuide) 3. Video plays, video is embedded into page (ie you aren't taken to YouTube). Pause function works. 4. New tab opens, user is taken to the UWA Library YouTube account. 5. Each social media icon changes colour when mouse hovers over them (note Facebook changes to a slightly darker blue). When each icon is clicked a new tab opens and the user is taken to the relevant social media account for UWA Library. 6. Content is not missing, format is as expected and colours match 				
Banner display and links	Tests that all links in the banner are displaying and working correctly	<ol style="list-style-type: none"> 1. Click UWA logo, click back button to return to OneSearch home page 2. Click each link in the top banner and confirm expected behaviour, when required click the ellipsis (3 dots) to display all links. For: <ol style="list-style-type: none"> a. <i>Get It Request</i>: Sign in when prompted b. <i>Find Items</i>: select Book and perform a Title search for <i>Discovered Reservations</i> 	<ol style="list-style-type: none"> 1. User is taken to the UWA page then back to OneSearch homepage 2. Expected behaviour for all links (Not in order): <ul style="list-style-type: none"> <i>Library Home</i>: Library Home page opens in new tab <i>New Search</i>: Page refreshes and OneSearch homepage displays <i>Databases</i>: Find Databases page displays in new tab <i>Help</i>: User is taken to the OneSearch guide in new tab <i>Research Repository</i>: User is taken to the Research Repository homepage 				

UWA's Test Plan

2018 August - Primo Release Checklist

Created by Stacey van Groll, last modified just a moment ago

- Be aware that these Checklists are a moment in time in the two week period between Sandbox release and Production - check Alma & Primo - Known Issues for ongoing updates

New features, changes, and fixes

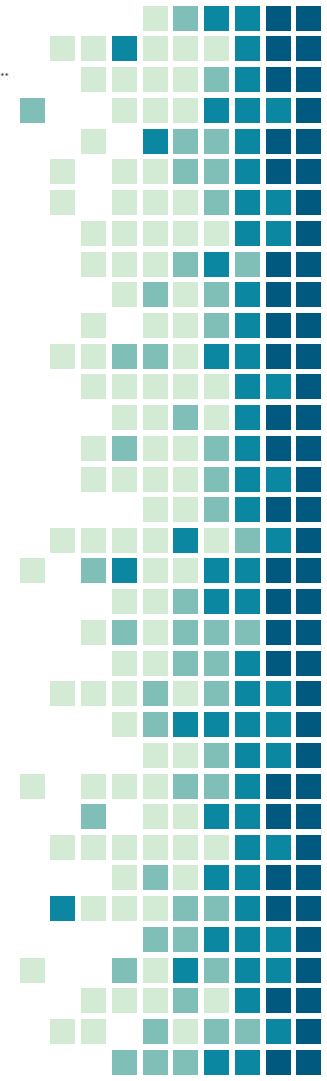
New feature	Status	Details	Decision notes
Template	Opt in / Opt out / Mandatory enhancement		<ul style="list-style-type: none"> 🔗 Decisions to be made: 👍 Recommendation: ★ AGDA decision: ★ Work to be done:

- Performance improvements
- Features earlier advised as being in the release, but not mentioned in the Highlights
- Anticipated local resolved issues from the Defect Fix list
- Some more potential local resolved issues
- Features likely in next release

Testing of existing features

Feature	AGDA Members	Testing Environment	Status, Notes and Initials
<ul style="list-style-type: none"> • Basic Search advanced search techniques <ul style="list-style-type: none"> • Test quotation marks, wildcards, boolean etc • Test modifying keywords of an existing search 	Faculty Librarians	Sandbox and Production	
<ul style="list-style-type: none"> • Advanced Search <ul style="list-style-type: none"> • Adding lines • Construct a complex search • Test use each of the fields 	Faculty Librarians Nick	Sandbox and Production	
<ul style="list-style-type: none"> • Browse Search <ul style="list-style-type: none"> • Test each of the types • Try going forward and back from results to items • Try modifying the search 	Faculty Librarians	Sandbox and Production Sandbox Browse Search URL - as no link from Primo, only Library homepage	
<ul style="list-style-type: none"> • Login / logout behaviour <ul style="list-style-type: none"> • User Area • Full Record • Brief Results 	SvG	Sandbox - account needed: Sandboxes - Access & Info Production	

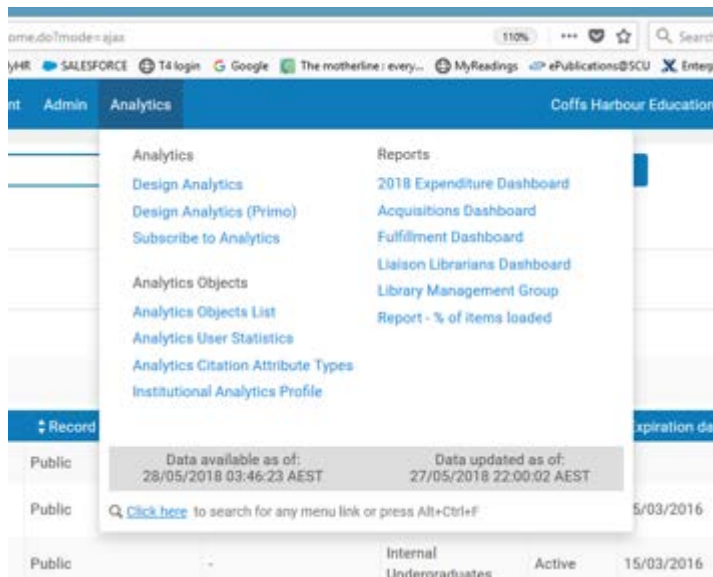
UQRelease Checklist



Listserv topic: Primo Analytics

Question from Bond

- I'd like to see how having Primo analytics in Alma can be better leveraged – are there new ways this can be used compared to accessing them from the Primo back office, and is there any reduction in what can be done with them by having it integrated

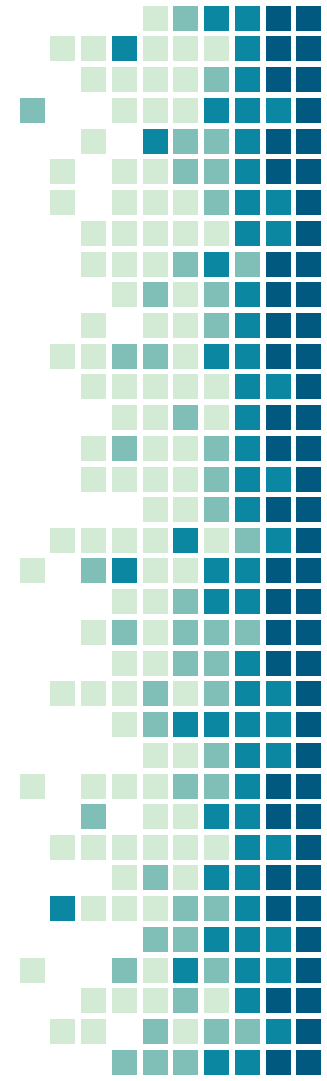


The screenshot shows a web browser window displaying the ALMA Analytics menu. The browser address bar shows 'ome.do?mode=ajas'. The page title is 'Coffs Harbour Education'. The menu is open, showing two columns of options:

- Analytics**
 - Design Analytics
 - Design Analytics (Primo)
 - Subscribe to Analytics
 - Analytics Objects
 - Analytics Objects List
 - Analytics User Statistics
 - Analytics Citation Attribute Types
 - Institutional Analytics Profile
- Reports**
 - 2018 Expenditure Dashboard
 - Acquisitions Dashboard
 - Fulfillment Dashboard
 - Liaison Librarians Dashboard
 - Library Management Group
 - Report - % of items loaded

Below the menu, there is a table with columns for 'Record', 'Public', 'Internal Undergraduates', and 'Active'. The first row shows 'Public' and 'Active' with a date of '5/03/2016'. The second row shows 'Public' and 'Active' with a date of '15/03/2016'. A search bar is visible at the bottom of the menu with the text 'Click here to search for any menu link or press Alt+Ctrl+F'.

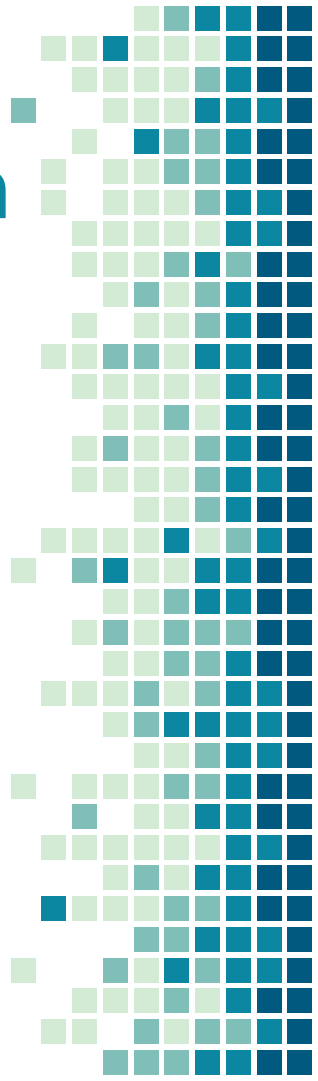
Analytics menu in
ALMA

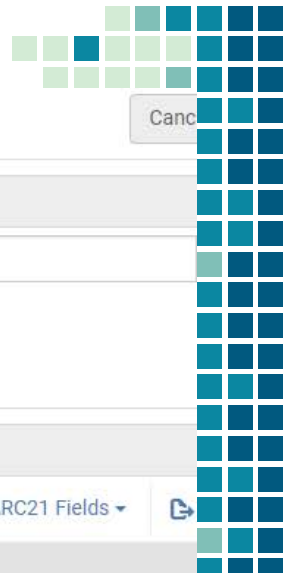


Listserv topicVE Metadata customization

Question from RMIT

- 2) (this is more directed towards Primo VE) how do you customise the metadata and fields (such as including or excluding fields from display) in the details section of the Primo full record view.





< Define a Local Field

Cancel

Local field details

Field to edit * **local_field_04**

Display label * **Database Subject Headings**

Enable field for search

Use the parallel Local Field 01/50 from the Dublin Core record

Enable field for facet

MARC21 Fields

1 - 1 of 1

+ Add MARC21 Fields

MARC21 Field	
1	691

< View Configuration

61UWA_INST:UWA

View Name UWA

General

Links Menu

Search Profile Slots

Advanced Search Configuration

Brief Results

Brief Record Display

Full Record S

Define View

Code * **61UWA_INST:UWA**

Name * **UWA**

Description **IIWA View**

Primo VE: Local Fields



61UWA_INST:UWA

View Name UWA

- General
- Links Menu
- Search Profile Slots
- Advanced Search Configuration
- Brief Results
- Brief Record Display
- Full Record Services
- Manage Customization Package

Restore  




Code	Description			
1 searchWithinJour...	Search for articles within a journal			
2 getit_link1	View It/Get It		▲	
3 details	Record details		▲	...
4 recommendations	Recommendations		▲	
5 browseshelf	Browse Shelf		▲	

Primo VE:
Change
display fields

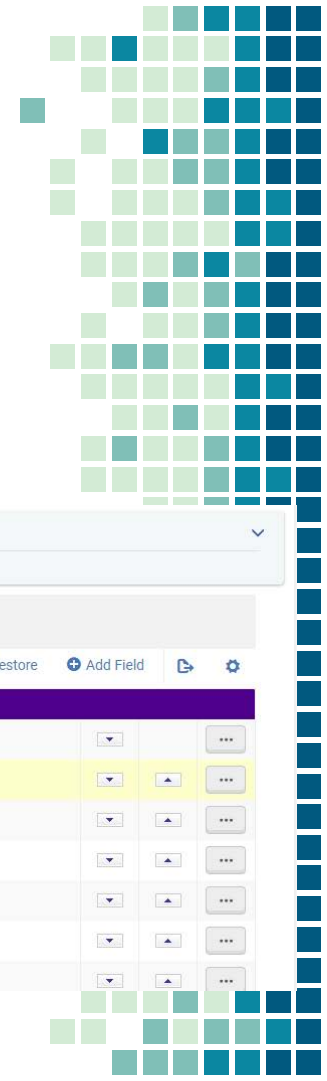
61UWA_INST:UWA

View Name UWA Full Display Services Detail Section

Delimiter * ;

Restore  Add Field  

Fields			
1 Title ; Vernacular Title			...
2 Uniform title		▲	...
3 Creator ; Contributor		▲	...
4 Is Part Of		▲	...
5 Dissertation		▲	...
6 Subject		▲	...
7 Genre		▲	...



Listserv topicBO Metadata customization

Portion of mapping doc for UQ's OTB and local fields - for tracking and staff information

MARC21	Meaning	Implementation Display	Post Implementation			Nov 2017 Display	Nov 2017 Search	Nov 2017 Links
			Display in Details Tab	Indexed for Search	Lateral Link			
020	ISBN: standard number	OTB	Identifier	ISBN		Identifier	ISBN	
022	ISSN: standard number	OTB	Identifier	ISSN		Identifier	ISSN	
050	LC Call Number	Ids01	Ids01	Isr01		Ids01	Isr01	
090	Local Call Number	Ids02	Ids02	Isr02		Ids02	Isr02	
100	Personal name	OTB	Creator	creatorcontrib,addtitle	Yes OTB	Creator	creatorcontrib,addtitle	Author/creator
110	Corporate name	OTB	Creator	creatorcontrib,addtitle	Yes OTB	Creator	creatorcontrib,addtitle	Author/creator
111	Meeting name	OTB	Creator	creatorcontrib,addtitle	Yes OTB	Creator	creatorcontrib,addtitle	Author/creator
130	Main Entry Uniform title	Ids43	Ids30	Isr30, alttitle, title	Yes Local	Uniform Title	title, alttitle	Uniform title
210	Abbreviated title	Ids03	Ids03	Isr03, alttitle		Ids03	Isr03, alttitle	
222	Key title	Ids04	Ids04	Isr04		Ids04	Isr04	
240	Uniform title	Ids44	Ids31	Isr31, alttitle	Yes Local	Uniform Title	alttitle	Uniform title
245	Title	OTB	Title	title, general, creatorcontrib		Title	title, general, creatorcontrib	
246	Varying title	Ids05	Ids05	Isr05, alttitle		Ids05	Isr05, alttitle	
250	Edition	OTB	Edition	n/a		Edition	n/a	
260	Imprint	OTB	Publisher	general, creation, start, enddate		Publisher	general, creation, start, enddate	
264	Production, Publication, Distrib	OTB	Publisher	general, creation, start, enddate		Publisher	general, creation, start, enddate	
260/264	Publisher		Advanced Search	Isr26 Advanced Search Index		Advanced Search	Isr26 Advanced Search Index	
300	Physical description	OTB	Format	n/a		Format	n/a	
310	Current frequency	Ids06	Ids06	Isr06		Ids06	Isr06	
321	Former frequency	Ids07	Ids07	Isr07		Ids07	Isr07	
500	General note	Ids08	Ids08	Isr08		Ids08	Isr08	
501	With	Ids09	Ids09	Isr09		Ids09	Isr09	
502	Dissertation note	OTB	Publisher	general		Publisher	general	
504	Bibliography, etc	Ids10	Ids10	Isr10		Ids10	Isr10	
505	Formatted contents	OTB	Description	description, toc		Description	description, toc	
506	Restrictions on access	Ids11	Ids11	Isr11		Ids11	Isr11	
508	Creation, production, credits	Ids12	Ids12	general		Ids12	general	
511	Participant / performer	Ids13	Ids13	creatorcontrib		Ids13	creatorcontrib	
515	Numbering peculiarities	Ids14	Ids14	Isr14		Ids14	Isr14	
520	Summary	OTB	Description	description		Description	description	
525	Supplement note	Ids15	Ids15	Isr15		Ids15	Isr15	
530	Additional format available	Ids16	Ids16	Isr16		Ids16	Isr16	
533	Reproduction	Ids17	Ids17	Isr17		Ids17	Isr17	
534	Original version note	Ids18	Ids18	Isr18, general		Ids18	Isr18, general	
538	System details	Ids19	Ids19	Isr19		Ids19	Isr19	
545	Biographical note	Ids20	Ids20	Isr20		Ids20	Isr20	
546	Language	Ids21	Ids21	Isr21		Ids21	Isr21	
550	Issuing body note	Ids22	Ids22	Isr22		Ids22	Isr22	

Listserv topicBO Metadata customization

BO Resource type creation and blending > UQ mapping process doc

Step	Target	Content	Mapping	Source	Action	Result	
Create Norm Rules and Norm Mapping	Alma - display:type Norm rule	Singular Source	mapped from the	text entered as constant in the rule or Mapping Tables as indicated eg Validate FMT	to create the	<type>journal</type>	
	Alma - format_mean Normalization Mapping Table	Singular Source to Plural Target	maps to the	facets:rsrctype Norm rule	to create the	<rsrctype>journals</rsrctype>	
	Alma - facets:prefilter Normalization Mapping Table	Singular Source to Plural Target	maps to the	facets:prefilter Norm rule	to create the	<prefilter>journals</prefilter>	
	Alma - facets:prefilter Norm rule	Plural Target	mapped from the	pre-filter Normalization Mapping Table	to create the	<prefilter>journals</prefilter>	
	Alma - facets:rsrctype Norm rule	Plural Target	mapped from the	format_mean Normalization Mapping Table	to create the	<rsrctype>journals</rsrctype>	
	eSpace - DC_Type Normalization Mapping Table	DC Source Type to Singular Target	maps to the	display:type Norm rule	to create the	<type>journal</type>	
	eSpace - display:type Norm rule	Singular Source	mapped from the	DC_Type Normalization Mapping Table	to create the	<type>journal</type>	
	eSpace - DC_Type Normalization Mapping Table	DC Source Type to Singular Target	maps to the	format_mean Normalization Mapping Table	to create the	<rsrctype>journals</rsrctype>	
	eSpace - format_mean Normalization Mapping Table	Singular Source to Plural Target	maps to the	facets:rsrctype Norm rule	to create the	<rsrctype>journals</rsrctype>	
	eSpace - facets:prefilter Normalization Mapping Table	Singular Source to Plural Target	maps to the	facets:prefilter Norm rule	to create the	<prefilter>journals</prefilter>	
	eSpace - facets:prefilter Norm rule	Plural Target	mapped from the	pre-filter Normalization Mapping Table	to create the	<prefilter>journals</prefilter>	
	eSpace - facets:rsrctype Norm rule	Plural Target	mapped from the	format_mean Normalization Mapping Table	to create the	<rsrctype>journals</rsrctype>	
	Deploy the Norm Rules						
	Deploy the Code and Mapping Tables						
Run the Update Pipe							
Create the Static Mapping	facet_pfilter_values Static Facets Mapping Table	Plural Value	maps to the	Basic Media Type Code table	to create the	Basic Search Tile	
	facet_rtype_values Static Facets Mapping Table	Plural Value	maps to the	Facet Resource Type Code Table	to create the	Facets	
Sync the Static Mapping							
Update the Code Tables	facet_pfilter_values_codes Code Table	Defaults - no values					
	Facet Resource Type Code Table	Plural Value	mapped from the	facet_rtype_values Static Facets Mapping Table	creates the	Facets	
	Basic Media Type Code Table	Plural Value	mapped from the	facet_pfilter_values Static Facets Mapping Table	creates the	Basis Search Tile	
	Advanced Media Type Code Table	Plural Value			creates the	Advanced Search Tile	
	Icon Codes Code Table	Singular Value			creates the	Thumbnail	
Deploy the Code and Mapping Tables							
Update the Views	Basic Search Tile	Plural Value	mapped from the	Basis Search Tile	creates the	Basic Search Content Type drop down menu	
	Advanced Search Tile	Plural Value	mapped from the	Advanced Search Tile	creates the	Advanced Search Content Type drop down menu	
Deploy the Views							

Listserv topic BO Metadata customization

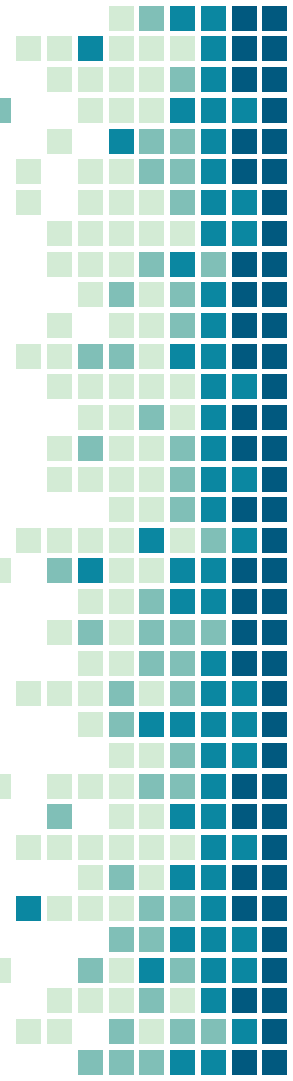
UQ's blending resource types for local (Alma and eSpace) and PCI, for consistent user experience

They don't care that different data comes from different sources, and shouldn't have to

Nb Consistency column is related to PCI testing ie if you search for rsrctype, then all others should disappear, but can be PCI FRBR grouping issues

Nb split imminent for Books and Book Chapters for eSpace and PCI

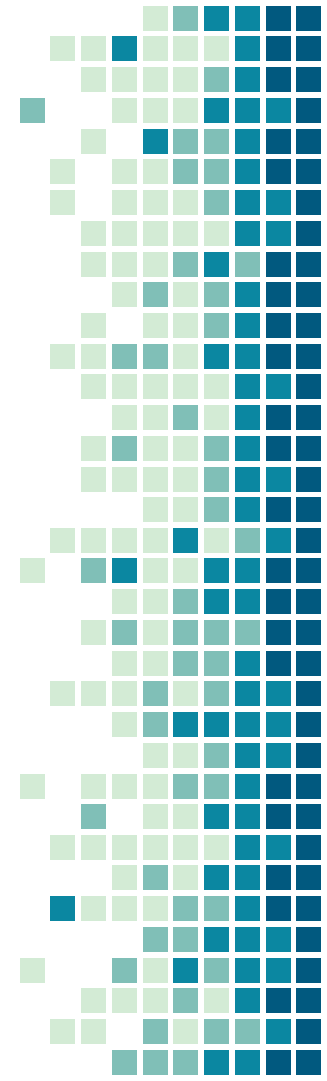
Type	Alma	eSpace	PCI	RSRCTYPE	Consistent
Book	Yes	Yes	Yes	book	No
Exam Paper	Yes			exam paper	Yes
Score	Yes		Yes	score	Mostly
Database	Yes		Yes	database	Mostly
Manuscript	Yes	Yes		manuscript	Mostly
Thesis	Yes	Yes	Yes	dissertation	Yes
Map	Yes		Yes	map	Yes
Video & Audio	Yes	Yes	Yes	video OR audio	Mostly
Journal	Yes	Yes	Yes	journal	Mostly
Image	Yes	Yes	Yes	image	Yes
Text Resource	Yes		Yes	text resource	No
Other	Yes		Yes	other	Mostly
Article		Yes	Yes	article	No
Design		Yes		design	Yes
Working Paper		Yes		working paper	Yes
Conference Paper		Yes		conference paper	Yes
Conference Proceeding		Yes	Yes	conference proceeding	No
Government Document			Yes	government document	Yes
Legal Document			Yes	legal document	Yes
Newspaper Article			Yes	newspaper article	No
Patent			Yes	patent	Yes
Reference Entry			Yes	reference entry	Yes
Research Dataset			Yes	research dataset	Yes
Review			Yes	review	No
Research Report		Yes		research report	Yes
Statistical Data Set			Yes	statistical data set	Yes
Technical Report		Yes	Yes	technical report	Yes
Website	Yes		Yes	website	Yes



Topic ideas Views & Scopes & Tabs

- Views

What might be simple in one version ie VE, may be complex in another ie BO



Primo BO Views & Scopes & Tabs

```
<search>
<title>English composition and critical analysis SemA 2007</title>
<description>Past in-class synthesis test</description>
<subject>LANG1001</subject>
<subject>Education</subject>
<sourceid>RMIT_ALMA_DC</sourceid>
<recordid>RMIT_ALMA_DC11105807380001341</recordid>
<rsrctype>other</rsrctype>
<creationdate>2007</creationdate>
<startdate>20070101</startdate>
<enddate>20071231</enddate>
<addtitle>81105280880001341</addtitle>
<addsrcrecordid>9921556794401341</addsrcrecordid>
<searchscope>RMIT_ALMA_DC</searchscope>
<searchscope>RMITPE</searchscope>
<searchscope>RMITU</searchscope>
<scope>RMIT_ALMA_DC</scope>
<scope>RMITPE</scope>
<scope>RMITU</scope>
<cdparentID>81105280880001341</cdparentID>
</search>
```

Screenshot of PNX record with 3 search scope values

Update Views / Scopes in Primo BO requires quite a few steps for set up.

Creating a Scope for example requires creating the Scope then working with the Normalization rules in the BO to add the new Search Scope to the PNX.



Primo BΘ Views & Scopes & Tabs

Search Scope List

Name	Description	Search Type
Remote	PCI	Remote
Local	Alma	Local
default_scope	Alma and PCI	Both
Readings	Text Book collections	Local

Code ▾	Description ▾	Language ▾
MEETING		en_US ▾
MEETING_040817.mainmenu.label.library_search	FindIt @Flinders	en_US
MEETING_050517.mainmenu.label.library_search	Library Search	en_US
MEETING_230217.mainmenu.label.library_search	Library Search	en_US
MEETING_030717.mainmenu.label.library_search	FindIt @Flinders	en_US

When setting up new UI, needed to be able to assess different configuration options and 'milestone' work to date.

New UI can use existing view for openURL display instead of old separate service page.

Needed to keep familiar view in place until ready to switch over.

- Created multiple views.
- Some had different labels and configurations to allow for trying out new features, and revisiting some old ones. I.e course reserve and dissertations vs these resource types.
- Testing various search scope options, tabs and search fields.
- Adding codes to change labels per view, and main menus.
- Adding new UI specific labels as they became available.
- OpenURL reasoning



Primo VE: Configuring Search Profiles

< Search Profiles

Back

Search Profiles

Custom Local Data Scopes

Other Indexes

+ Add a Search Profile



▲ Code	↕ Display Name	Search type	↕ Description	
CentralIndex	Articles and more	Central Index	All records within your Central Index profile	...
CourseReserves	Course Reserves	Local Data	All records linked to an active course	...
ExamPapers	Examination Papers	Local Data	Examination Papers Search Profile	...
MyInst_and_CI	OneSearch	Blended	Blended - All records belonging to your institution and your Central Index profile	...
MyInstitution	Library Catalog	Local Data	All records belonging to your institution	...
WorldCat	WorldCat	Other Index	WorldCat is a union catalog that itemizes the collections of 72,000 libraries in 170 countries and territories that participate in the Online Computer Library Center global cooperative.	...

Primo VE: Configuring Search Profiles

< Define a Custom Search Profile

Cancel

Save

Search Profile Details

Code *

Display Name *

Description

List of Scopes included in the Search Profile

+ Add Scope



	Code	Name	Description		
1	CentralIndex	Central Index	All records within your Central Index profile	<input checked="" type="checkbox"/> Filter by Availability	...
2	MyInstitution	My Institution	All records belonging to your institution		...

Primo VE: Configuring Search Profiles

Clear Conditions [+ Add a Condition](#) ▾

i Up to three conditions can be defined ×

Search Index

Metadata: Additional title ▾

Operator

Contains Keywords ▾

Value

Logic

And ▾

Add Condition

Primo VE: Configuring Search Profiles

< Search Profiles

Back

Search Profiles

Custom Local Data Scopes

Other Indexes

+ Add Other Index ▾



Other Index code	Other index name	Other index type	
1 WorldCat	WorldCat	WorldCat	WorldCat

Ebsco

WorldCat



< Define WorldCat Scope

Cancel

Scope Details

Code *

Name *

Description

WorldCat Details

WorldCat API Key *

Primo VE: Configuring Views

< View Configuration

Back

Save

view Name UWA

General Links Menu Search Profile Slots Advanced Search Configuration Brief Results Brief Record Display Full Record Services

Manage Customization Package

Define View

Code * 61UWA_INST:UWA

Name * UWA

Description UWA View

General Attributes

Time-out URL

Timeout (in minutes) for guest users *

0

Timeout (in minutes) for signed in users *

60

Default Language *

English

Side bar (Tweak my results) position

On the left

Auto Complete Enabled



Select as Default View



Enable the 'Personalize Your Results' service



Enable Collection Discovery Features



Primo VE: Configuring Views

View Configuration

General Links Menu Search Profile Slots Advanced Se

Manage Customization Package

1 - 12 of 12

Active	Code	Label	URL			
<input checked="" type="checkbox"/>	LibrarySearch	New Search	/disc			
<input checked="" type="checkbox"/>	Databases	Databases	http://			
<input checked="" type="checkbox"/>	Blanklll	Get It Request	Blanklll	Request material not available via OneSearch	▼	▲
<input checked="" type="checkbox"/>	OneSearch_...	Help	http://guides.library.uwa.edu....	Provides help, tips and guidance for using OneSearch	▼	▲
<input checked="" type="checkbox"/>	LibraryHome	Library Home	http://www.library.uwa.edu.au/	Go to Library homepage (opens in new window)	▼	▲
<input checked="" type="checkbox"/>	citationlinker	Find Item	citationlinker	Find a specific article, journal or book using known citation information	▼	▲
<input checked="" type="checkbox"/>	JournalSearch	Journal Search	jsearch	Search for a specific journal title	▼	▲
				Contains research publications and		

Define Menu Link

Code * **JournalSearch**

URL * **jsearch**

Label * **Journal Search**

Description **Search for a specific journal title**

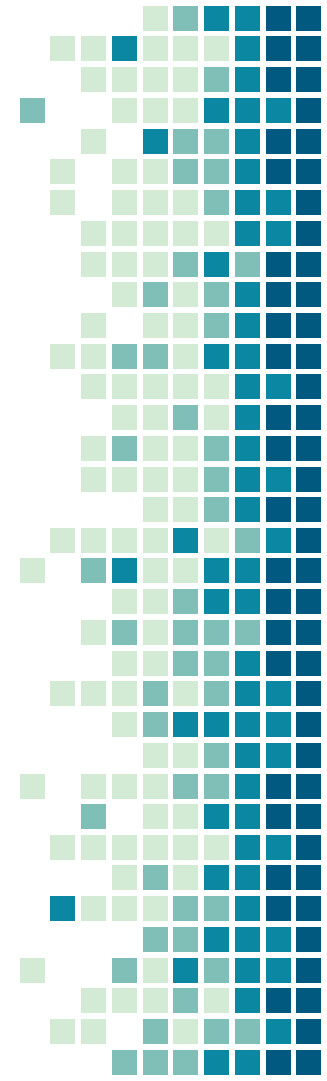
Primo VE: Configuring Views

General | Links Menu | Search Profile Slots | **Advanced Search Configuration** | Brief Results | Brief Record Disp

Manage Customization Package

1 - 4 of 4

	Active	Code	Name	Description	Search Profiles
1	<input checked="" type="checkbox"/>	Everything	OneSearch	Local data and Central Index	MyInst_and_CI
2	<input checked="" type="checkbox"/>	LibraryCatalog	Library Catalog	Local data only	MyInstitution
3	<input checked="" type="checkbox"/>	CentralIndex	Articles	Central Index only	CentralIndex
4	<input type="checkbox"/>	CourseReserves	Course Materials Online	Resources related to courses	CourseReserves



Primo VE: Configuring Views

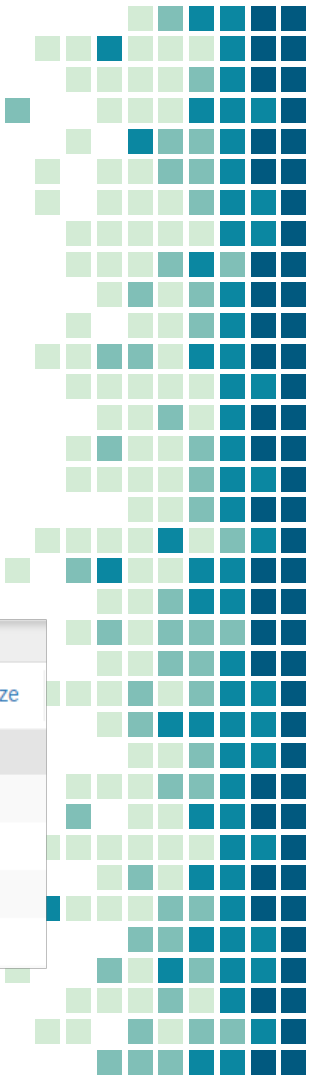
General Links Menu Search Profile Slots Advanced Search Configuration Brief Results Brief Record Display Full Rec

Manage Customization Package

List of Indexes

1 - 10 of 10 [Customize](#)

Active	Code	Name	Search Profile Slots	
List of Resource Types				
1 - 8 of 8 Customize				
List of Languages				
1 - 20 of 21 Customize				
Active	Code	Name	Search Profile Slots	
1	<input checked="" type="checkbox"/>	any	any	ALL
2	<input checked="" type="checkbox"/>	ara	Arabic	ALL
3	<input checked="" type="checkbox"/>	cze	Czech	ALL
4	<input checked="" type="checkbox"/>	chi	Chinese	ALL



Primo VE: Configuring Views

General | Links Menu | Search Profile Slots | Advanced Search Configuration | Brief Results | Brief Record Display | Full Record Display | Manage Customization Package

Display Fields

Customize

Fields

- 1 Vernac
- 2 Creato
- 3 Creati
- 4 Is Part

Record Actions

Customize



	Active	Code	Description	Up-Front Ac (Up to 3)
1	<input type="checkbox"/>	e-shelf	Add/Remove record to Favorites	<input checked="" type="checkbox"/>
2	<input type="checkbox"/>	E-mail	Send record via Email	<input checked="" type="checkbox"/>
3	<input type="checkbox"/>	Permalink	Create a Permalink for the record	<input checked="" type="checkbox"/>
4	<input type="checkbox"/>	Citation	Create a citation for the record	<input type="checkbox"/>

Primo VE: Configuring Views

ef Record Display

Full Record Services

Manage Customization Package

Customize



Code	Description
searchWith...	Search for articles within a journal
getit_link1	View It/Get It
details	Record details
recommen...	Recommendations
tags	Tags
browseshelf	Browse Shelf
links	Links
citationTrai...	Citation Trail and Times Cited

Customize

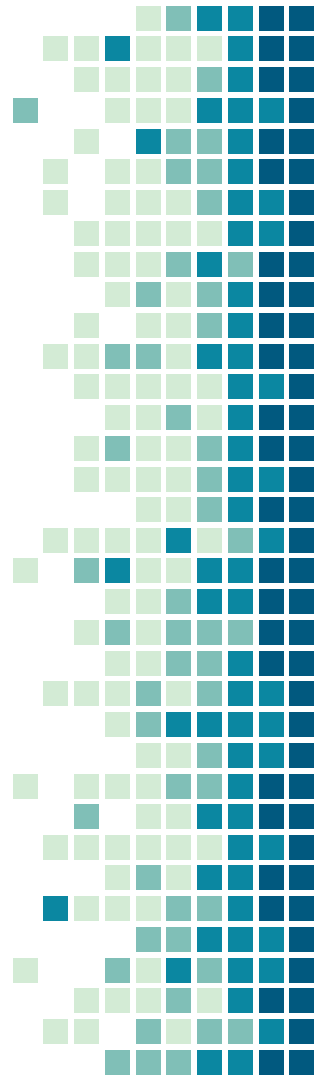


Fields

- 1 Title ; Vernacular Title
- 2 Creator ; Contributor
- 3 Is Part Of
- 4 Dissertation
- 5 Subject
- 6 MESH subjects
- 7 Genre
- 8 Description
- 9 Contents
- 10 Other title
- 11 Related titles
- 12 Series

VE Import external sources

- Import repository records from bepress(Digital Commons)
 - Use OAI dc oai_dc
 - Documentation available at [Primo VE knowledge centre](#)
 - Create Normalization rule and attach to a Normalization process
 - Create a Discovery import profile
 - Configure Local resource types where needed
 - Run the harvest!
- [Primo VE ANZREG View](#)



Primo VE External resources

Browser address bar: <https://sandbox01-ap.alma.exlibris> 90%

Navigation: Back to Alma, Alma Configuration Sandbox

Configuring: Southern Cross Uni

Filter List:

Category	Item	
Search Configuration	Search Profiles	
	Restricted Search Groups	
	Display Configuration	
Request Configuration	Digitization Request	
	Hold and Booking Request	
	Purchase Request	
	Resource Sharing Request	
Loading External Data Sources	Normalization rules for External Data sources	
	Test Normalization Rules	
	Normalization Process Task	
Authentication	User Authentication	
	Restricted User Groups (Central Index / Ebsco)	
Other	Resource Recommender Configuration	
	Central Index and proxy set-up	
	Primo Deep-Link Re-Direct Configuration	

Discovery

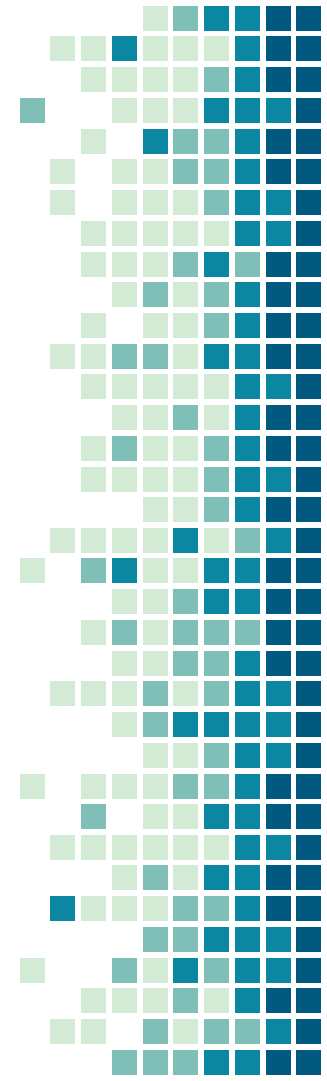
Acquisitions

Resources

Fulfillment

User Management

General



Normalization

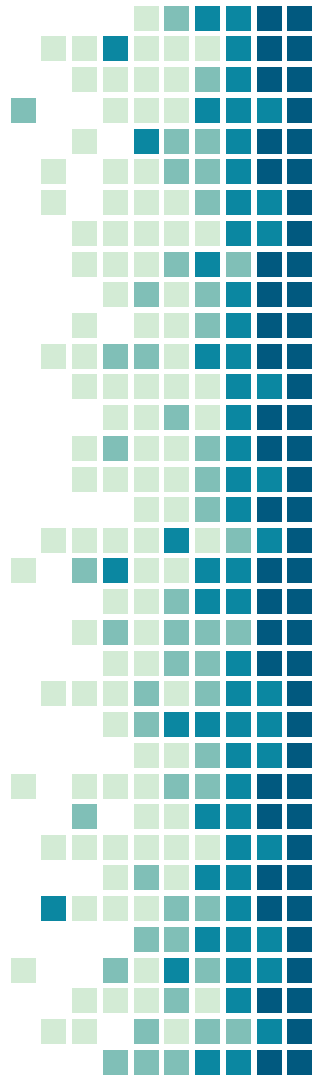
SCU - map dc:type from bepress to PrimoVE

```
rule "from dc:type text to discovery:type article and data collections dc:type to local type 05 data"  
when  
  "dc"."source" equals "All data sets"  
then  
  set "Data collection" in "discovery"."resourceType"  
end  
  
rule "from dc:type article to discovery:type article"  
when  
  "dc"."type" equals "article"  
then  
  set "Article" in "discovery"."resourceType"  
end  
  
rule "from dc:type presentation to discovery:type conference_proceedings"  
when  
  "dc"."type" equals "presentation"  
then
```

[Info](#)

[Alerts](#)

[Linked Data](#)



Profile Details

Normalization

Delivery

Profile Details

Profile name * **SCU ePublications - bepress**

Profile description **Import profile for ingesting records from the repository into Primo VE**

Data Source Code * **bepress**

Data Source Label * **ePublications@SCU**

Originating system * **Other**

File name patterns

Import Protocol **OAI**

Physical source format **XML**

Source format **Dublin Core**

Target format **Dublin Core**

Status **Active**

Scheduling

Scheduler status Active Inactive

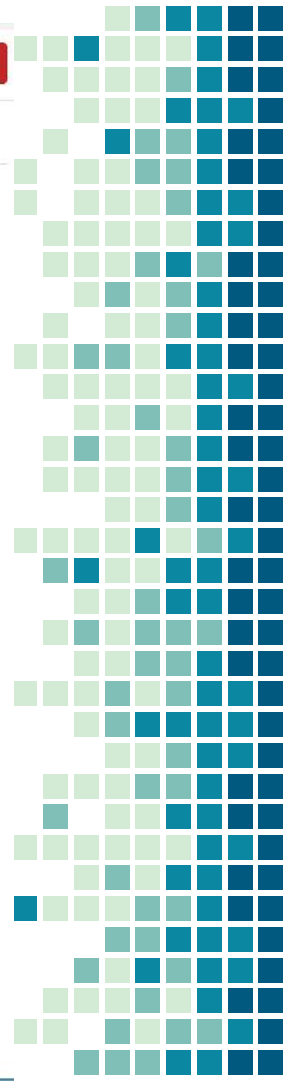
Scheduler * **Not scheduled**

Email Notifications

OAI Details

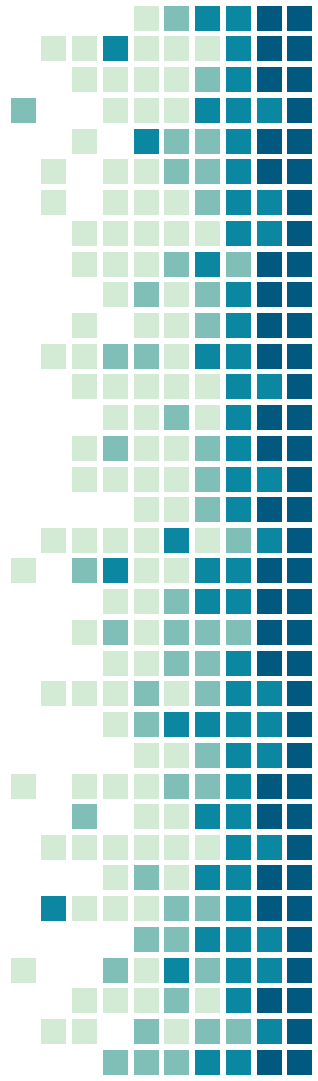
OAI Base URL * **https://epubs.scu.edu.au/do/oai/**

Authentication



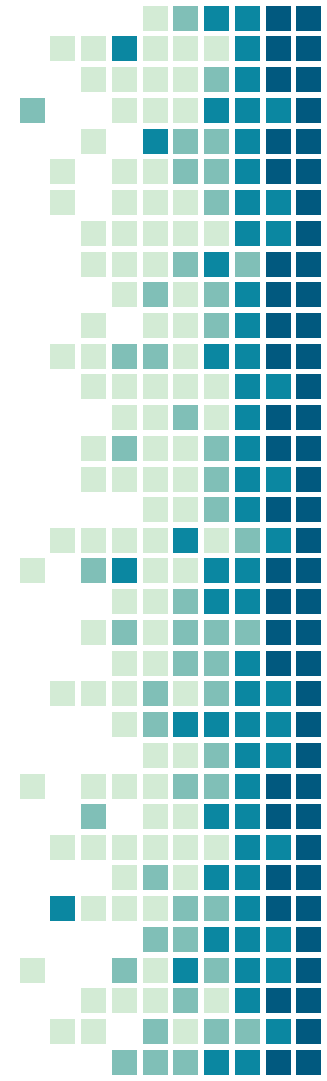
BO import external sources

- Does your external resource support some sort of file/XML publishing? ie DC, OAI-PMH, MarcXML etc.
- What about digital sources ie WARC etc?
- Can you do some sort of transformation to get it into supported format?
- What sort of operation do you want to do ie full refresh, incremental update, delete?



BO import external sources steps

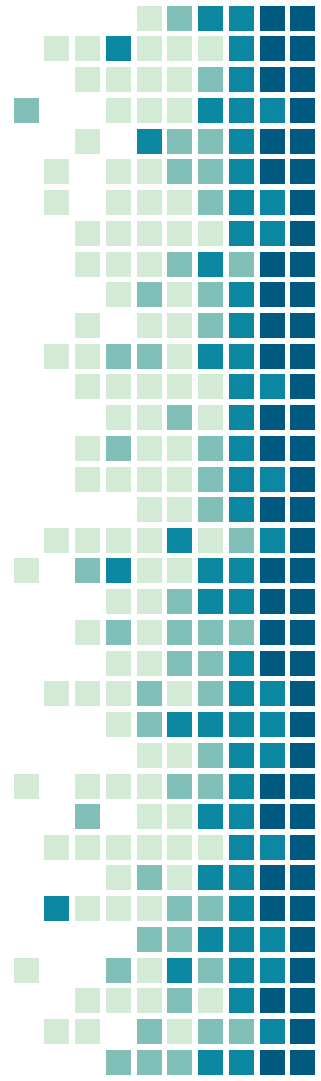
- Configure in the ongoing configuration wizard.
 - Define the data source what characteristics does the data have?
 - Define the normalization rules to apply to the data source. Use of mapping tables. Ie resource types etc.
 - Define any enrichment to add to the PN~~X~~ie TOC.
 - Then configure a pipe to pull this together into a harvest.
 - Do you want to FRBR/dedupe the results?
 - Schedule the pipe be aware of ongoing primo jobs.
 - Don't forget scopes! Don't forget to add to views!



BO import external source pipe

- Exlibris knowledge base covers the basics. (except bugs)

Source	Normalization and Enrichment	Errors
Data Source: * FUL_DSPACE	Normalization Mapping Set: * Generic Dublin Core - Template	Maximum error threshold: 5 % (1-100)
Harvesting method: * OAI	Enrichment Set: * No Enrichments - Template	<input type="checkbox"/> Force DEDUP ⓘ
Server: * https://dspace.flinder.	Harvested File Format: * *.tar.gz	<input checked="" type="checkbox"/> Force FRBR ⓘ
Metadata format: * oai_dc	System Last Stage: * FRBR	
Set col_2328_35727		
Encode Resumption Token: false		
Start harvesting files/records from: * Mar 24, 2018		
Start time: 02 : 35 : 34		



BO import external source data source

Data Source Attributes for FUL_DSPACE

Source Description

Owner:
Flinders University

Source name:
FUL_DSPACE

Source code:
FUL_DSPACE

Source format:
DC

Description:
Flinders Academic Commons

Original Source Code

Source Definition

Source system:
Other

Version

File Splitter:
OAI splitter

Character Set:
UTF-8

Input Record Path
oai_dc:dc

File needs transformation

Transformation file name

XREF keys

LCCN ▲
OCLC
ISSN
ISBN ▼

BO import external sources normalization rules

OTB	Generic Dublin Core - Template	9	dublin_core	View
OTB	Alma UNIMARC - Template	9	marc	View
OTB	ALEPH danMARC2 - Template	10	marc	View
Flinders University	FUL_DSPACE	8	dublin_core	Edit
OTB	Complex Xml - Template	2	complex_xml	View

[Deploy](#)

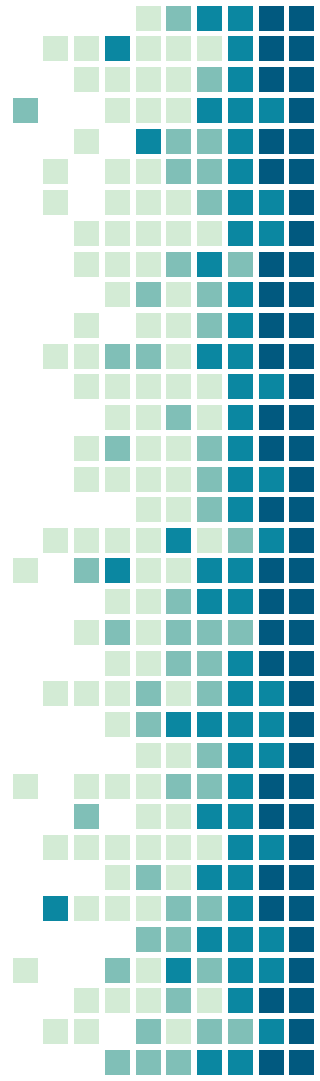


Do you want to know more?

Slides will be made available

Post queries to the listserv

OLH



THANKS!

Contact us at....

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lorraine.ackroyd@uwa.edu.au

amelia.rowe2@rmit.edu.au

margaret.pembroke@scu.edu.au

matthew.hooper@flinders.edu.au

