

In Primo Back Office

Ongoing Configuration Wizards

# CalState Sandbox Primo Back Office

Welcome to Primo Back Office - monitor and configure your settings

[Home](#) | [Deploy & Utilities](#) | [General](#) | [Local Data](#) | [Publishing](#) | [FE & Delivery](#) | [Search Engine](#)

## Monitoring & Maintenance

- > **Monitor Primo Status**  
Stay in control with one glance of all aspects of Primo performance
- > **Primo Utilities**  
Cleanup procedures and More
- > **Primo Reports**  
View available reports or catalog a new report
- > **Schedule Tasks**  
Schedule Primo tasks such as harvesting, reloading indexes and more
- > **PNX Viewer**  
Browse PNX files

## Configuration & Management wizards

- > **Ongoing Configuration Wizards**  
Configure and manage the Staff, Institutions, Views, Data sources and Pipes settings to maintain the proper function of Primo
- > **Advanced Configuration**  
Manage the advanced features of Primo, like Search Engine, Installation, UI and PNX

Views Wizard

# CalState Sandbox Primo Back Office

[Primo Home](#) > [Ongoing Configuration Wizards](#)

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#)

## > **Ongoing Configuration Wizards**

### » **Institution Wizard**

Manage and configure Institution setting

### » **Pipe Configuration Wizard**

Manage and configure Data Sources and Pipes settings

### » **Restrictions and Delivery Configuration Wizard**

Configure Search Restrictions and Delivery Functionality

### » **Views Wizard**

Manage and configure View settings

### » **Staff Configuration Wizard**

Manage and configure staff settings

### » **Configure User Groups**

Configure user groups for end user restrictions

### » **User Authentication Wizard**

Manage and configure authentication settings

### » **PDS Configuration Wizard**

Manage and configure PDS settings

Select a campus and edit its Main View

(In the screenshot below, I chose Cal State Northridge and edited its Main View.)

**CalState Sandbox Primo Back Office** [About!](#) [Logout!](#)

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Views Wizard](#) ExLibris Primo

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#) Hello mji

> **Views List**

**Search View By:**

Owner :

Owner	View Name	Code	Description	Copied From	
California State University, Northridge	default scope	01CAL\$ _UNO_ SP		Services Page	<a href="#">Edit</a> <a href="#">Delete</a>
California State University, Northridge	01CAL\$ _UNO Main View	01CAL\$ _UNO	01CAL\$ _UNO Main View	default	<a href="#">Edit</a> <a href="#">Delete</a>
California State University, Northridge	01CAL\$ _UNO Test View	01CAL\$ _UNO_ Testview	01CAL\$ _UNO Test View	01CAL\$ _UNO Main View	<a href="#">Edit</a> <a href="#">Delete</a>

Save & Continue to Scopes List

## CalState Sandbox Primo Back Office

[About](#) [Logout](#) [Help](#)

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Views Wizard](#)

ExLibris Primo

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#)

Hello mjun

### > Edit View Attributes

View : 01CALIS\_UNO Main View

### General View Attributes of 01CALIS\_UNO Main View View (California State University, Northridge):

#### General section

<b>View Name:*</b>	01CALIS_UNO Main View	(Give the view a meaningful identification, for example the library name)
<b>Code :*</b>	01CALIS_UNO	<b>Default user institution :*</b> California State University, Northridge
<b>Is Template</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Copied From:</b> default <b>Inherits:</b> <input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Description:</b>	01CALIS_UNO Main View	
<b>Enable My Library Card</b>	<input checked="" type="checkbox"/>	
<b>Invoke automatic search when tabs are switched</b>	<input checked="" type="checkbox"/>	
<b>Enable the "Personalize Your Results" service</b>	<input checked="" type="checkbox"/>	
<b>Enable Citation Trail</b>	<input checked="" type="checkbox"/>	

[Cancel & Go back](#)  
To Views List

[Save & Continue](#)  
To Scopes List

Continue to View Tabs

## CalState Sandbox Primo Back Office

[About](#) [Logout](#) [Help](#)

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Views Wizard](#)

ExLibris Primo

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#)

Hello mjun

### > Search Scope List

View : 01CAL5\_UNO Main View ▾

#### Search Scope List

Name	Description	Search Type		
CSU_PLUS_NO_FULLTEXT	1CAL5_UNO and 1CAL5	Both	<a href="#">Edit</a>	<a href="#">Delete</a>
EBSCO	EBSCO	Remote	<a href="#">Edit</a>	<a href="#">Delete</a>
default_scope	Entire Local Repository	Local	<a href="#">Edit</a>	<a href="#">Delete</a>
EVERYTHING	Everything	Both	<a href="#">Edit</a>	<a href="#">Delete</a>
01CAL5_UNO_CR	California State University, Northridge Course Reserves	Local	<a href="#">Edit</a>	<a href="#">Delete</a>
01CAL5_UNO	California State University, Northridge Collection	Local	<a href="#">Edit</a>	<a href="#">Delete</a>
01CAL5	California State University Collections	Local	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">go back</a> To Edit View	Primo Central	Remote	<a href="#">Edit</a>	<a href="#">Delete</a>

[Continue](#)  
To View Tabs

Continue to Tile List

## CalState Sandbox Primo Back Office

[About](#) [Logout](#) [Help](#)

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Views Wizard](#)

ExLibris Primo

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#)

Hello mjun

### > Tabs Configuration

View : 01CAL5\_UNO

#### Tabs List for View 01CAL5\_UNO

No.	Tab Code	Description			
1	everything	CSUN Collections	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
2	course_reserves	Course Reserves	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
3	all_libraries	All CSU Libraries	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼

#### Create a New Tab

Tab Code:  Description:  [Create](#)

[go back](#)

To Scopes List

[Continue](#)

To Tile List



## Advanced Search, Edit Tile

### CalState Sandbox Primo Back Office

[About](#) | [Logout](#) | [Help](#)

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Views Wizard](#)

ExLibris Primo

[Home](#) | [Deploy & Utilities](#) | [General](#) | [Local Data](#) | [Publishing](#) | [FE & Delivery](#) | [Search Engine](#)

Hello mjun

#### > Tiles Configuration

View : 01CAL5\_UNO

Page :

#### All tiles of 01CAL5\_UNO

Page	Tile	Status	More
Home Page	Basic Search	Configured By Client	<a href="#">Edit Tile</a>
Home Page	Advanced Search	Configured By Client	<a href="#">Edit Tile</a>
Home Page	Main Menu	Configured By Client	<a href="#">Edit Tile</a>
Home Page	Static HTML	Configured By Client	<a href="#">Edit Tile</a>

[Go back](#)

To Views List

[Continue](#)

To Deploy

Material Type, Edit

> [Edit Advanced Search Attributes](#)

View :01CAL5\_UNO

Tile : Advanced Search

**Texts of Advanced Search Tile**    Interface Language::

Code	English Label
Opening Text	<input type="text"/>
Ending Text	<input type="text"/>

**Define search pre-filters**

Search Type	Search Status	everything	course_reserves	all_libraries			
Complex Search Line 25	User Defined	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Complex Search Line 1	User Defined	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Complex Search Line 21	User Defined	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Publication Date	Default	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
<b>Material Type 5</b>	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Languages 1	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Date Range	Default	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Delete</a>	▲▼
Complex Search Line 22	User Defined	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Complex Search Line 23	User Defined	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Complex Search Line 24	User Defined	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼

Create a new search option    Search Type:     [Create](#)

[Cancel & Go back](#)  
To Tiles List [Add search options](#)

[Save & Continue](#)  
To Tiles List

OK

calstate-primosb.hosted.exlibrisgroup.com:1443 says

You may have updated some details regarding the search type on this page. Save these changes before continuing?

Cancel

OK

Select the media type/material type you wish to display in Primo's advanced search.

De-select Audio Visual (because it no longer exists as a format or a facet. There are more specific facets/formats in place of audio visual.)

Select: ~~Archival Materials, Audio CDs, Videocassettes, Streaming Audios, Kits, CD-ROM/DVD-ROMs, Streaming Videos,~~

~~LPs, Blu-rays, Atlases, Three Dimensional Objects, DVDs~~

The order of the media/material types in the Back Office is the same as they will appear in Primo's advanced search material type drop-down.

To change the order of the media/material types, use the up and down arrows.

(It's very tedious so save your work periodically by clicking on Save & Continue.)

> **Edit Advanced Search Attributes**

View :01CAL5\_UNO

Title : Advanced Search

Interface Language:

**Search Target Media Types of Advanced Search tile:**

Media Type	Display	Default	
Books	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Articles	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Journals	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Images	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Audio Visual	<input type="checkbox"/>	<input type="radio"/>	▲▼
Scores	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Maps	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
All items	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	▲▼
Databases	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Web Sites	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Research Datasets	<input type="checkbox"/>	<input type="radio"/>	▲▼
Technical Reports	<input type="checkbox"/>	<input type="radio"/>	▲▼
Rare Books	<input type="checkbox"/>	<input type="radio"/>	▲▼
Legal Documents	<input type="checkbox"/>	<input type="radio"/>	▲▼
Reference Entries	<input type="checkbox"/>	<input type="radio"/>	▲▼
Statistical Data Sets	<input type="checkbox"/>	<input type="radio"/>	▲▼
Newspaper Articles	<input type="checkbox"/>	<input type="radio"/>	▲▼
Conference Proceedings	<input type="checkbox"/>	<input type="radio"/>	▲▼
Theses and Dissertations	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Government Documents	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Technical Report	<input type="checkbox"/>	<input type="radio"/>	▲▼
Reviews	<input type="checkbox"/>	<input type="radio"/>	▲▼

(After re-ordering, your list may look like the following:)

**Search Target Media Types of Advanced Search tile:**

Media Type	Display	Default	
All items	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	▲▼
Archival Materials	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Articles	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Atlases	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Audio CDs	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Blu-rays	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Books	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
CD-ROM/DVD-ROMs	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Databases	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
DVDs	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Images	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Journals	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Kits	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
LPs	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Maps	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Scores	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Streaming Audios	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Streaming Videos	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Three Dimensional Objects	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Videocassettes	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Web Sites	<input checked="" type="checkbox"/>	<input type="radio"/>	▲▼
Audio Visual	<input type="checkbox"/>	<input type="radio"/>	▲▼

**Cancel & Go back**  
To Advanced Tile Configuration  
Technical Reports



**Save & Continue**  
To Advanced Tile Configuration



Save & Continue to Advanced Tile Configuration.

Save & Continue to Tiles List

> **Edit Advanced Search Attributes**

View :01CAL5\_UNO

Tile : Advanced Search

**Texts of Advanced Search Tile**    Interface Language::

Code	English Label
Opening Text	<input type="text"/>
Ending Text	<input type="text"/>

**Define search pre-filters**

Search Type	Search Status	everything	course_reserves	all_libraries			
Complex Search Line 25	User Defined	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Complex Search Line 1	User Defined	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Complex Search Line 21	User Defined	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Publication Date	Default	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Material Type 5	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Languages 1	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Date Range	Default	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<a href="#">Delete</a>	▲▼
Complex Search Line 22	User Defined	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Complex Search Line 23	User Defined	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼
Complex Search Line 24	User Defined	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>	▲▼

Create a new search option    Search Type:     [Create](#)

[Cancel & Go back](#)  
To Tiles List [Add search options](#)

[Save & Continue](#)  
To Tiles List

Continue to Deploy

## CalState Sandbox Primo Back Office

[About!](#) [Logout!](#) [Help](#)

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Views Wizard](#)

ExLibris Primo

[Home](#) | [Deploy & Utilities](#) | [General](#) | [Local Data](#) | [Publishing](#) | [FE & Delivery](#) | [Search Engine](#)

Hello mjun

### > Tiles Configuration

View : 01CAL5\_UNO

Page :

#### All tiles of 01CAL5\_UNO

Page	Tile	Status	More
Home Page	Basic Search	Configured By Client	<a href="#">Edit Tile</a>
Home Page	Advanced Search	Configured By Client	<a href="#">Edit Tile</a>
Home Page	Main Menu	Configured By Client	<a href="#">Edit Tile</a>
Home Page	Static HTML	Configured By Client	<a href="#">Edit Tile</a>

[Go back](#)

To Views List

[Continue](#)

To Deploy

Deploy Now.

## CalState Sandbox Primo Back Office

[Primo Home](#) > [Ongoing Configuration Wizards](#) > **Views Wizard**

[Home](#) | [Deploy & Utilities](#) | [General](#) | [Local Data](#) | [Publishing](#) | [FE & Delivery](#) | [Search Engine](#)

### > Tiles Configuration

To have the View Configuration take effect in the Front End UI the View Configuration must be deployed.

If you do not deploy the configuration now it can be deployed at any time.

[Deploy Now](#)

[Go back](#)

To Views List

To check the status of the deployment,

Deploy & Utilities, Deploy Monitoring

The screenshot shows the 'CalState Sandbox Primo Back Office' interface. At the top, there is a breadcrumb trail: 'Primo Home > Monitor Primo Status > Deploy Monitoring'. Below this is a navigation bar with tabs: 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. The 'Deploy & Utilities' tab is highlighted with a green box, and its dropdown menu is open, showing options: 'Deploy All', 'Deploy Monitoring', 'File Uploader', 'Customization Manager', 'Cleanup Procedures', 'System Tests', and 'Manage Staff'. A mouse cursor is pointing at the 'Deploy Monitoring' option. Below the navigation bar, there is a 'Filter' section and a table with columns 'Deploy Name' and 'Deploy Date'. The table contains two rows of data: one with 'Jun 08, 2018' and another with 'Jun 08, 2018 19:37'.

Deploy Name	Deploy Date
LL	Jun 08, 2018
ews	Jun 08, 2018 19:37

> **Deploy Job Summary**

**Filter Deploy List By:**

Owner	Deploy Name	Deploy Date	User Name	Deploy Id	Status
<input type="text" value="ALL"/>	<input type="text" value="ALL"/>	<input type="text" value="Jun 08, 2018"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="ALL"/>
California State University, Northridge	Views	Jun 08, 2018 19:37	mjun	<a href="#">bd58ee7f-e2e5-4af4-a62b-daa3fe8160bf</a>	Running

# Before

The screenshot shows the CSUN OneSearch library website. The browser's address bar displays the URL: [https://csun-primosb.hosted.exlibrisgroup.com/primo-explore/search?vid=01CAL5\\_UNO&sortby=rank](https://csun-primosb.hosted.exlibrisgroup.com/primo-explore/search?vid=01CAL5_UNO&sortby=rank). The page header includes the CSUN logo and the OneSearch logo. Navigation links for LIBRARY HOME, DATABASES, and LIBGUIDES are visible. The main search area features a search bar with the following options: **Search for:**  CSUN Collections,  Course Reserves, and  All CSU Libraries. Below the search bar, there are two search criteria lines. The first line shows "Any field" and "contains" with dropdown arrows. The second line shows "AND" and "Any field" and "contains" with dropdown arrows. To the right of these lines are three filter dropdowns: "Material Type" set to "Audio Visual", "Language" set to "Any language", and "Publication Date" set to "Any year". At the bottom of the search area, there are buttons for "+ ADD A NEW LINE" and "CLEAR". The text "SIMPLE SEARCH" is located on the right side of the search area.





Search for:  CSUN Collections  Course Reserves

Any field  contains

AND  Any field  contains

+ ADD A NEW LINE CLEAR

- Journals
- Images
- Audio Visual
- Scores
- All items

SIMPLE SEARCH

# After

The screenshot shows the CSUN OneSearch library website. The browser's address bar displays the URL: [https://csun-primosb.hosted.exlibrisgroup.com/primo-explore/search?vid=01CAL5\\_UNO&sortby=rank](https://csun-primosb.hosted.exlibrisgroup.com/primo-explore/search?vid=01CAL5_UNO&sortby=rank). The page header includes the CSUN logo and the OneSearch logo. Navigation links for LIBRARY HOME, DATABASES, and LIBGUIDES are visible. The search interface features a search bar with the following options:  CSUN Collections,  Course Reserves, and  All CSU Libraries. The search criteria are set to "Any field" contains "Any field". The search results are filtered by "Material Type" (Streaming Videos), "Language" (Any language), and "Publication Date" (Any year). The interface also includes a "SIMPLE SEARCH" button, an "ADD A NEW LINE" button, and a "CLEAR" button.



Search for:  CSUN Collections  Course Reserves  All CSUN

Any field  contains

AND  Any field  contains

[+ ADD A NEW LINE](#) [CLEAR](#)

- Kits
- CD-ROM/DVD-ROMs
- Streaming Videos
- LPs
- Blu-rays

SIMPLE SEARCH



