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 $\ensuremath{\mathsf{Main}}$ View

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

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#### Search Scope List

View : 01CALS\_UNO Main View \$

#### Search Scope List

Name	Description	Search Typ	be	
CSU_PLUS_NO_FULLTEXT	1CALS_UNO and 1CALS	Both	Edit	Delete
EBSCO	EBSCO	Remote	Edit	Delete
default_scope	Entire Local Repository	Local	Edit	Delete
EVERYTHING	Everything	Both	Edit	Delete
01CALS_UNO_CR	California State University, Northridge Course Reserves	Local	Edit	Delete
01CALS_UNO	California State University, Northridge Collection	Local	Edit	Delete
01CALS	California State University Collections	Local	Edit	Delete
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#### Advanced Search, Edit Tile

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Home	Deploy & Utilities	General	Local Data	Publishing	FE & Delivery	Search Engine	Hello mjun

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#### Tiles Configuration

View : 01CALS_UNO	Page :	Home Page

All tiles of 01CALS\_UNO

			More
Home Page	Basic Search	Configured By Client	Edit Tile
Home Page	Advanced Search	Configured By Client	Edit Tile
Home Page	Main Menu	Configured By Client	Edit Tile
Home Page	Static HTML	Configured By Client	Edit Tile

Go back To Views List Continue To Deploy Material Type, Edit

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Define	search	pre-filters
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Search Type	Search Status	everything	course_reserves	all_libraries			
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Complex Search Line 21	User Defined				Edit	Delete	
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Languages 1	User Defined				Edit	Delete	
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Complex Search Line 23	User Defined				Edit	Delete	
Complex Search Line 24	User Defined		•		Edit	Delete	-
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ancel & Go back						Save & Co	ontinue

Cancel & Go back

# 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



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.)

CalState Sandbox Primo Back Office	Aboutl Logoutl Help
Primo Home > Ongoing Configuration Wizards > Views Wizard	ExLibris Primo
Home         Deploy & Utilities         General         Local Data         Publishing         FE & Delivery         Search Engine	Hello mjun

#### Edit Advanced Search Attributes

View :01CALS\_UNO Tile : Advanced Search

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Interface Language: English

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

Media Type	Display	Default	
Books		•	
Articles		0	
Journals	<ul> <li>Image: A set of the set of the</li></ul>	0	
Images	×	0	
Audio Visual		0	
Scores		0	
Maps		0	
All items		۲	
Databases		0	
Web Sites	<ul> <li>Image: A set of the set of the</li></ul>	0	
Research Datasets		0	
Technical Reports		0	
Rare Books		0	
Legal Documents		0	
Reference Entries		0	
Statistical Data Sets		0	
Newspaper Articles		0	
Conference Proceedings		0	
Theses and Dissertations		0	
Government Documents	×.	0	
Technical Report		0	
Reviews		$\odot$	

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

Media Type	Display	Default	
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Archival Materials	V	0	
Articles		•	
Atlases	<b>e</b>	•	
Audio CDs		0	
Blu-rays	×.	0	
Books		•	
CD-ROM/DVD-ROMs		•	-
Databases		0	
OVDs		0	
mages		•	
lournals		0	
Kits		0	
Ps		0	
/laps		•	
Scores		•	
Streaming Audios		0	
Streaming Videos		0	
Three Dimensional Objects		•	
/ideocassettes		•	
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Audio Visual		0	AV

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Save & Continue to Advanced Tile Configuration.

Save & Continue to Tiles List

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Save & Continue To Tiles List

Cancel & Go back

#### Continue to Deploy

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Home         Deploy & Utilities         General         Local Data         Publishing         FE & Delivery         Search Engine	Hello mjun

# Tiles Configuration

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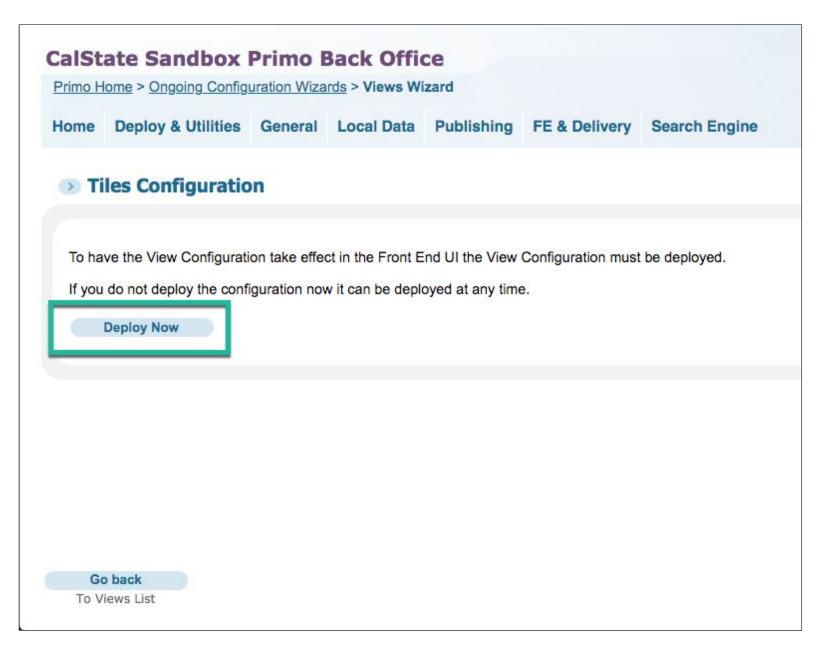
#### All tiles of 01CALS\_UNO

Page	Tile	Status	More
Home Page	Basic Search	Configured By Client	Edit Tile
Home Page	Advanced Search	Configured By Client	Edit Tile
Home Page	Main Menu	Configured By Client	Edit Tile
Home Page	Static HTML	Configured By Client	Edit Tile

Continue

To Deploy

Go back To Views List Deploy Now.



To check the status of the deployment,

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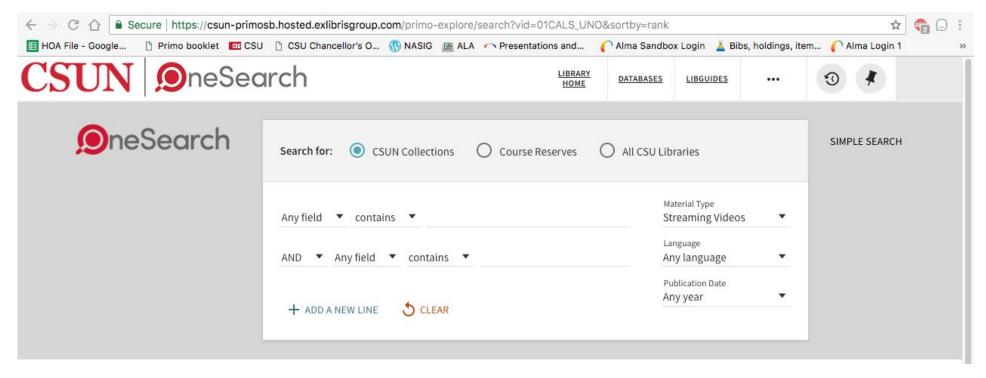
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