
Advanced search : updating material types

In Primo Back Office

Ongoing Configuration Wizards

(Note: The following screenshots are of the Sandbox back office but you should make your changes in the Production back office.)

CalState Sandbox Primo Back Office

Welcome to Primo Back Office - monitor and configure your settings

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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

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> 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.)

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> **Views List**

Search View By:

Owner :

Owner	View Name	Code	Description	Copied From	
California State University, Northridge	default scope	01CAL5_UNO_SP		Services Page	Edit Delete
California State University, Northridge	01CAL5_UNO Main View	01CAL5_UNO	01CAL5_UNO Main View	default	Edit Delete
California State University, Northridge	01CAL5_UNO Test View	01CAL5_UNO_Testview	01CAL5_UNO Test View	01CAL5_UNO Main View	Edit Delete

Save & Continue to Scopes List

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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

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

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To Views List

[Save & Continue](#)
To Scopes List

Continue to View Tabs

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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	Edit	Delete
EBSCO	EBSCO	Remote	Edit	Delete
default_scope	Entire Local Repository	Local	Edit	Delete
EVERYTHING	Everything	Both	Edit	Delete
01CAL5_UNO_CR	California State University, Northridge Course Reserves	Local	Edit	Delete
01CAL5_UNO	California State University, Northridge Collection	Local	Edit	Delete
01CAL5	California State University Collections	Local	Edit	Delete
go back To Edit View	Primo Central	Remote	Edit	Delete

[Continue](#)
To View Tabs

Continue to Tile List

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Hello mjun

> Tabs Configuration

View : 01CAL_S_UNO

Tabs List for View 01CAL_S_UNO

No.	Tab Code	Description			
1	everything	CSUN Collections	Edit	Delete	▲▼
2	course_reserves	Course Reserves	Edit	Delete	▲▼
3	all_libraries	All CSU Libraries	Edit	Delete	▲▼

Create a New Tab

Tab Code: Description: [Create](#)

[go back](#)

To Scopes List

[Continue](#)

To Tile List

Advanced Search, Edit Tile

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Hello mjun

> Tiles Configuration

View : 01CAL5_UNO

Page :

All tiles of 01CAL5_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

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To Deploy

Material Type, Edit

> **Edit Advanced Search Attributes**

View :01CAL5_UNO

Title : Advanced Search

Texts of Advanced Search Tile Interface Language:: English

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"/>	Edit	Delete	▲▼
Complex Search Line 1	User Defined	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete	▲▼
Complex Search Line 21	User Defined	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete	▲▼
Publication Date	Default	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete	▲▼
Material Type 5	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete	▲▼
Languages 1	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete	▲▼
Date Range	Default	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Delete	▲▼
Complex Search Line 22	User Defined	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit	Delete	▲▼
Complex Search Line 23	User Defined	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit	Delete	▲▼
Complex Search Line 24	User Defined	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit	Delete	▲▼

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

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 types you wish to display in Primo's advanced search.

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 :01CALS_UST

Tile : 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"/>	
Scores	<input type="checkbox"/>	<input type="radio"/>	
Maps	<input type="checkbox"/>	<input type="radio"/>	
All items	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	
Databases	<input type="checkbox"/>	<input type="radio"/>	
Web Sites	<input 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"/>	

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

All items

Archival Materials

Articles

Atlases

Audios

Audio CDs

Blu-rays

Books

CD-ROM/DVD-ROMs

Databases

DVDs

Images

Journals

Kits

LPs

Maps

Medias

Scores

Three Dimensional Objects

Videos

Videocassettes

Web Sites

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Hello
mjun

Search Engine

> **Edit Advanced Search Attributes**

View :01CAL5_UNO

Title : Advanced Search

Interface Language:

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"/>	▲▼
Audios	<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"/>	▲▼

Save & Continue to Advanced Tile Configuration.

Save & Continue to Tiles List

> **Edit Advanced Search Attributes**

View :01CAL5_UNO

Title : 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			
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Material Type 5	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete	▲▼
Languages 1	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete	▲▼
Date Range	Default	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Delete	▲▼
Complex Search Line 22	User Defined	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit	Delete	▲▼
Complex Search Line 23	User Defined	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit	Delete	▲▼
Complex Search Line 24	User Defined	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit	Delete	▲▼

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

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

[Save & Continue](#)
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Continue to Deploy

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Hello mjun

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Deploy Now.

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> 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 displays 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 border, and a dropdown menu is open, listing several options: 'Deploy All', 'Deploy Monitoring', 'File Uploader', 'Customization Manager', 'Cleanup Procedures', 'System Tests', and 'Manage Staff'. A mouse cursor is positioned over the 'Deploy Monitoring' option. Below the navigation bar, there is a 'Filter' section and a table with columns for 'Deploy Name' and 'Deploy Date'. The table contains two rows of data: one with 'ALL' and 'Jun 08, 2018', and another with 'Califo' and 'Jun 08, 2018 19:37'.

Deploy Name	Deploy Date
ALL	Jun 08, 2018
Califo	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	bd58ee7f-e2e5-4af4-a62b-daa3fe8160bf	Running

Result



Search for: CSUN Collections Course Reserves All CSU Libraries

Any field ▼ contains ▼ the

AND ▼ Any field ▼ contains ▼

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

Material Type
All items ▼

Language
Any language ▼

Publication Date
Any year ▼

→ Any field contains the

[SEARCH](#)



Search for: CSUN Collections Course Reserves All CSU Libraries

Any field ▼ contains ▼ **the**

AND ▼ Any field ▼ contains ▼

+ ADD A NEW LINE

CLEAR

→ Any field *contains* **the**

- All items
- Archival Materials
- Articles
- Atlases
- Audio CDs