Primo norm rules overview

Definitions

Primo Back Office (BO): website where Primo is configured. You need a separate login for the back office. There are two back offices: one for the sandbox and one for production.

> Sandbox BO url: https://calstate-primosb.hosted.exlibrisgroup.com:1443/primo_publishing/admin/acegilogin.jsp
> (Access to the back office is restricted by IP range (I think.) So you can only access the Primo back office from work.
> I haven't set up your user logins yet so you don't have access yet. I'll probably set you up as a NE (norm rules editor) first.
>
> https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/060Back_Office_Guide/030Configuring_Staff_Users_and_User_Groups/Staff_User_Configuration
>
> https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/060Back_Office_Guide/150Staff_User_Role_Privileges#wwconnect_header)

Primo normalization rules: configurations in the back office that take Marc data and transform it into Primo Normalized XML (PNX)

Primo renorm: A renormalization of Alma data. All Alma data is re-indexed and digested into Primo. A renorm implements additions and/or modifications to Primo norm rules.

Primo sandbox: a place to test Primo configurations and normalization rules.

> The Primo sandbox gets its Marc data from generic Exlibris records and some records contributed by CSU libraries during migration.
> Generally, changes to Primo are tested in the sandbox first and then carried over to production.

Primo production: real-live Primo, the Primo that library users see and use

> Links to CSU library production and sandbox instances of Primo
> https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/78291823/CSU+Primo+Instances

Exlibris documentation

Training videos to become familiar with the back office and navigating it

Getting Started
https://knowledge.exlibrisgroup.com/Primo/Training/Primo_Training/Introduction_to_Primo/Getting_Started

Videos:
01 Introduction to Primo,
02 What is Discovery and Delivery and
04 Introduction to Primo PNX and Publishing.

Primo Certification (you don't need to be Primo certified (I'm not), this is just the name of the webpage)
https://knowledge.exlibrisgroup.com/Primo/Training/Primo_Training/Primo_Certification

Videos:
01 Primo Back Office Overview,
05 Primo Normalized XML (PNX),
06 Normalization Rules Overview,
07 Normalization Rules Configuration

Knowledge center articles

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/040Editing_Normalization_Rules_Sets

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/070How_to_Edit_the_Normalization_Rules

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/040Editing_Normalization_Rules_Sets#The_Top_of_the_Normalization_Set_Editor_Page

Systemwide vs local configurations

Some things in Primo can be configured locally by each campus, other configurations are systemwide and require consensus.

> For example, norm rules for Alma Marc data (which is primarily what our task force deals with) are systemwide. The edition statement is taken from marc field 250 subfield a and b. This is systemwide.
>
> Individual campus libraries have some customization options. They can choose to display or not display the edition statement in Primo's full record view. They can also choose to add the edition statement to Primo's brief results.
>
> For details, see https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/586416144/Display+Fields+in+Primo+full+record+view
>
> https://trello.com/c/wgvLhJ5s/121-95-move-the-edition-details-up-near-the-author-and-year-above-the-find-it-and-get-it-tabs-it-is-currently-buried-too-far-down-6

Challenges

balancing the requests from one campus vs the system as a whole

displaying informative Marc fields in Primo vs cluttering up the display

If we index too many Marc fields will this introduce undesired behavior in Primo search results?

Work overview

The Primo norm rules groups mainly deals with the display (which Marc (sub)fields display in Primo and how they display) and indexing (which Marc (sub)fields are indexed for search in Primo), while considering the challenges mentioned above.

> Occasionally, we'll deal with other areas of Primo. For example, recently we re-aligned Primo facets and formats. Formats are the material types (DVDs, Audio CDs, Blu-Rays, Atlases, Web Sites…) described in the bibliographic record. We also re-configured that facets (search limiters that display on the left side in Primo) based on the new and revised formats.

When implementing or testing a norm rule, you'll always start in the Primo sandbox. You find an example record in the Primo sandbox search results. (This will be the record you'll test the effect of your norm rules on.) In the Primo sandbox back office you edit and/or add the norm rules.

For example, I want to display the Marc 310 field, current publication frequency. https://www.oclc.org/bibformats/en/3xx/310.html

First, I need to find a record in the sandbox that has the 310 field.
https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/78291823/CSU+Primo+Instances

I know that serials use the 310 to indicate the journal's publication frequency (annual, quarterly, monthly…)
So basically, I just randomly search Primo for a journal with a 310 in its bib record.

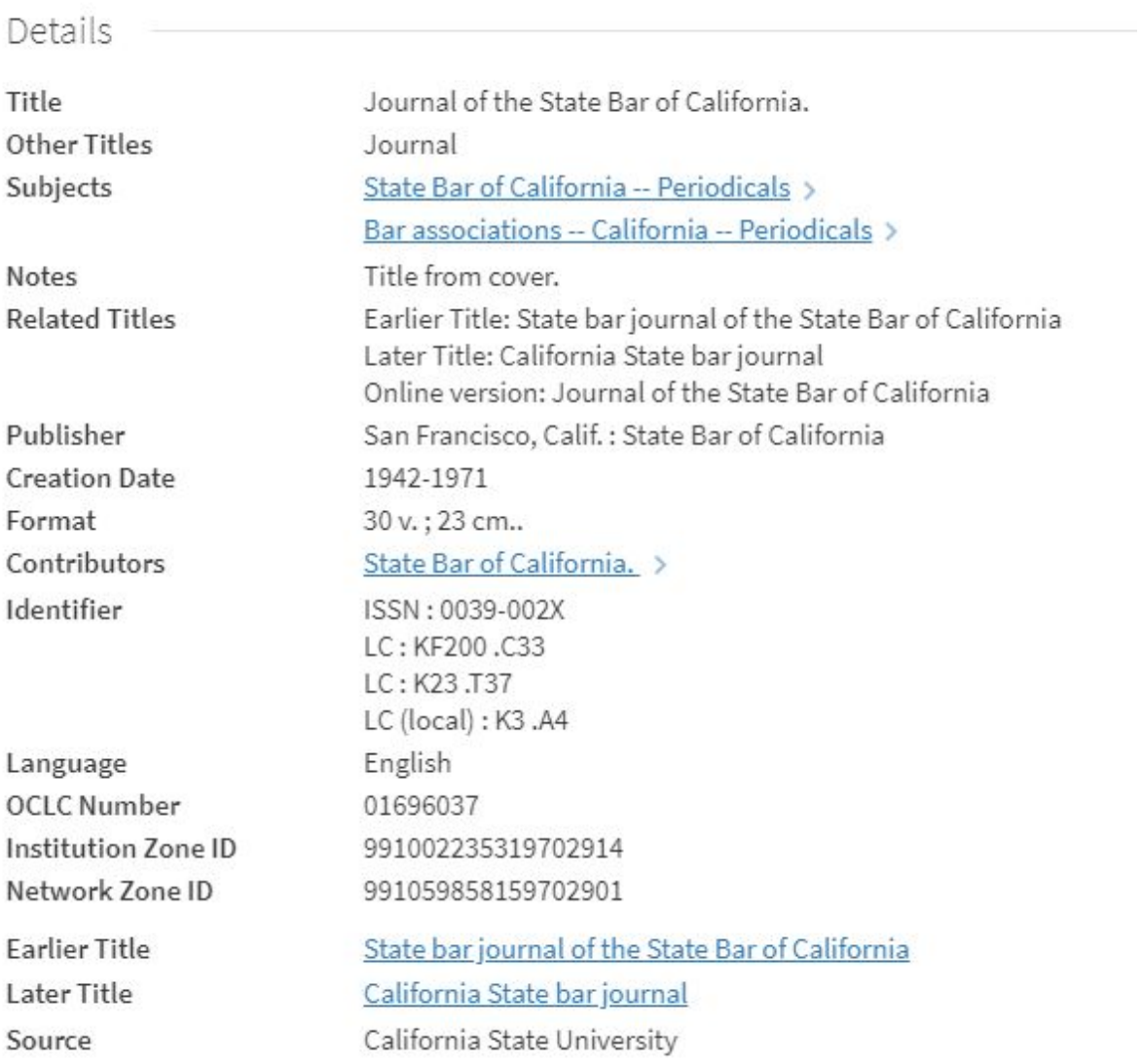
> (This can be a time-consuming task because basically you're searching Primo for bib records that have a specific field but you can't limit your search to that specific field.
>
> This is a scenario where you can use your cataloging skills. For example, I need to find a bib record with a 505 contents note. I know that a monograph of short stories usually would have a 505 note listing the titles of each story so maybe I'll search Primo for "short story.")

I found a title, Journal of the State Bar of California (oclc 01696037, issn 0039-002X).
https://csun-primosb.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CALS_ALMA71385912010002901&context=L&vid=01CALS_UNO&search_scope=EVERYTHING&tab=everything&lang=en_US

Marc record has 310 field

```
245    00$aJournal of the State Bar of California.
246    1#$iTitle varies slightly, May/June 1966-1971:$aJournal
260    ##$aSan Francisco, Calif. :$bState Bar of California,$c1942-1971.
300    ##$a30 v. ;$c23 cm.
310    ##$aBimonthly
362    0#$aVol. 17, no. 3 (Mar./Apr. 1942)-v. 46, no. 6 (Nov./Dec. 1971).
500    ##$aTitle from cover.
```

Primo full record view confirms that the 310 is not currently displayed.



Details

Title	Journal of the State Bar of California.
Other Titles	Journal
Subjects	State Bar of California -- Periodicals > Bar associations -- California -- Periodicals >
Notes	Title from cover.
Related Titles	Earlier Title: State bar journal of the State Bar of California Later Title: California State bar journal Online version: Journal of the State Bar of California
Publisher	San Francisco, Calif. : State Bar of California
Creation Date	1942-1971
Format	30 v. ; 23 cm..
Contributors	State Bar of California. >
Identifier	ISSN : 0039-002X LC : KF200 .C33 LC : K23 .T37 LC (local) : K3 .A4
Language	English
OCLC Number	01696037
Institution Zone ID	991002235319702914
Network Zone ID	991059858159702901
Earlier Title	State bar journal of the State Bar of California
Later Title	California State bar journal
Source	California State University

I've found my test record and took a screenshot of what the Primo record looks like before I made any changes to the norm rules.

(Optional: You may want to find additional records, especially if your norm rule is complex (display multiple subfields, or transform subfields) or if the Marc field itself is complex.)

Back Office walkthrough

sandbox back office: https://calstate-primosb.hosted.exlibrisgroup.com:1443/primo_publishing/admin/acegilogin.jsp

Most of your work will be in Local Data, Normalization Sets.

CalState Sandbox Primo Back Office

09/16/18 10:10:55 (Server Time) About| Logout| Help

Welcome to Primo Back Office - monitor and configure your settings

ExLibris Primo

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

- Data Sources
- Scope Values
- Normalization Sets
- Enrichment Sets
- Publishing Mapping Tables
- Restricted Search Scopes
- Restricted Delivery Scopes

Monitoring & Maintenance

Monitor Primo Status
Stay in control with one glance of all

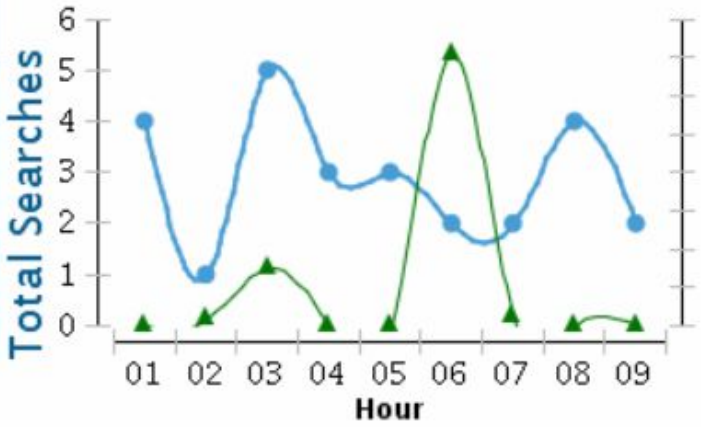
Primo Utilities
Cleanup procedures and More

Primo Reports
View available reports or catalog a n

Schedule Tasks
Schedule Primo tasks such as harvesting, reloading indexes and more

PNX Viewer
Browse PNX files

Pipes: OK Processes: OK Search: OK DB/FS/



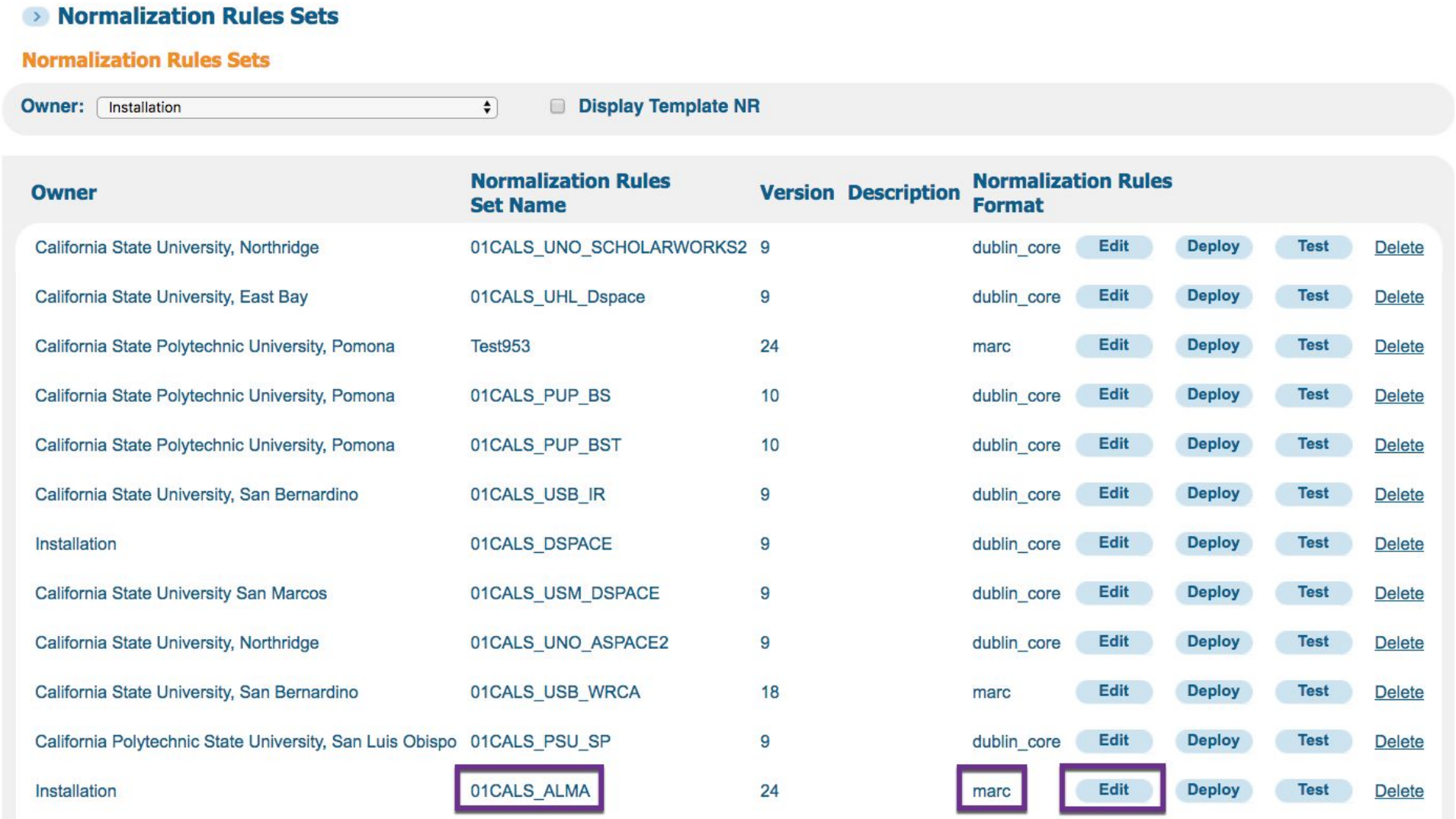
Deploy All
Deploy all

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

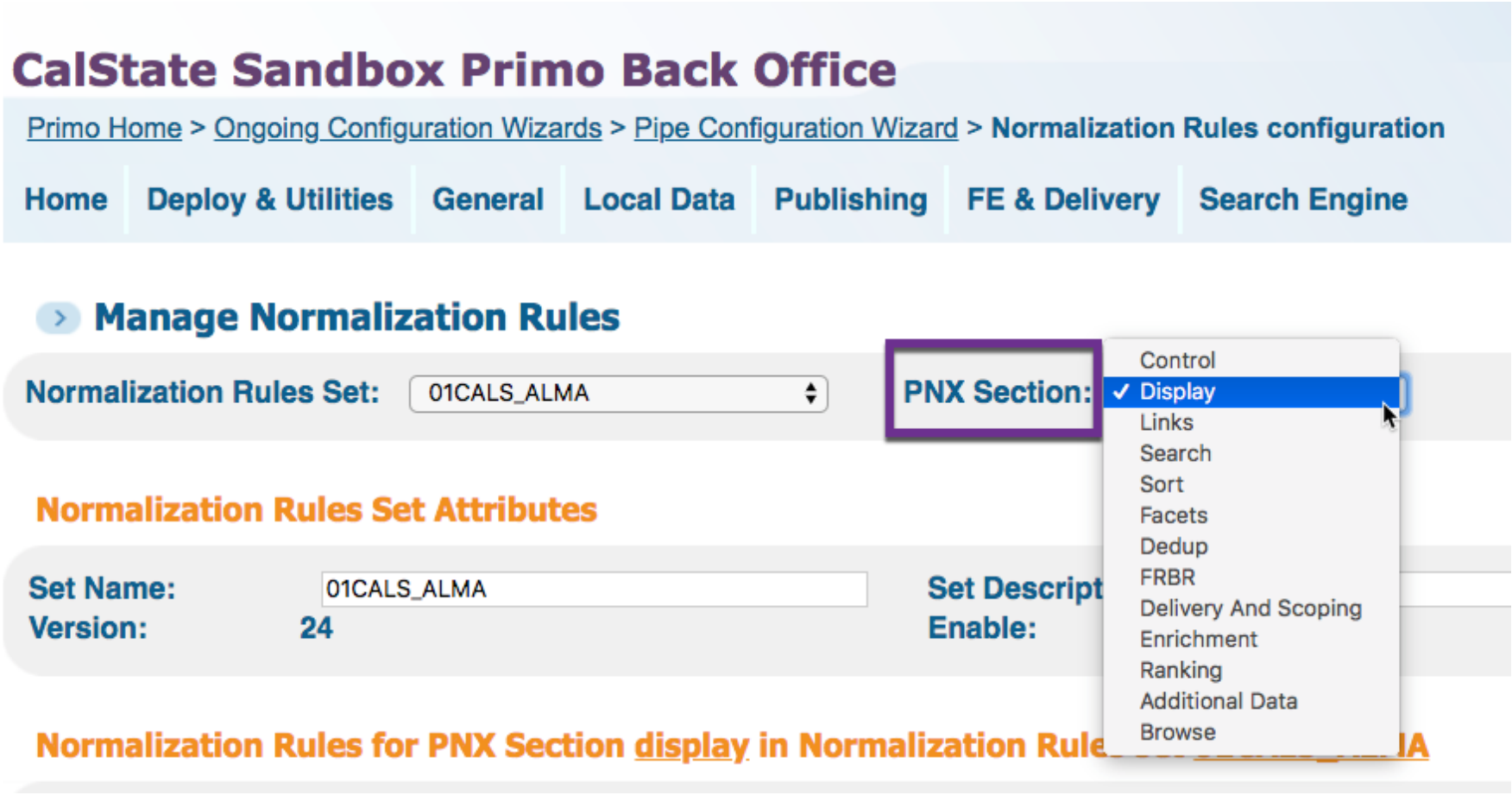
Advanced Configuration
Manage the advanced features of Primo, like Search Engine, Installation, UI and PNX

In the list of normalization rules sets, look for Owner: Installation, Normalization Rules Set Name: 01CALS_ALMA, Normalization format: marc



There are various norm rule sets but our group will focus on the Primo norm rules for marc data from Alma.

When you're editing the 01CALS_ALMA norm rules, you'll see a dropdown for PNX section.
You'll probably spend most of your time in the Display and Search sections.



To see a PNX record and its various sections, please see the following sample record.

https://csun-primosb.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CALS_ALMA71385912010002901&context=L&vid=01CALS_UNO&lang=en_US&tab=everything&showPnx=true

For more info on PNX records and how to view them, see
https://docs.google.com/document/d/1FSV394wHtn2MGP2hIxjWA6RSwiEY1VNB8TICvTiYD-g/edit#heading=h.lesu0hzd14lt

Practice

In the PNX section, Display which of the following Marc fields display and if so, which subfields are displayed?
(Hint: Use Ctrl + F in your browser to search for the specific Marc field tags.)

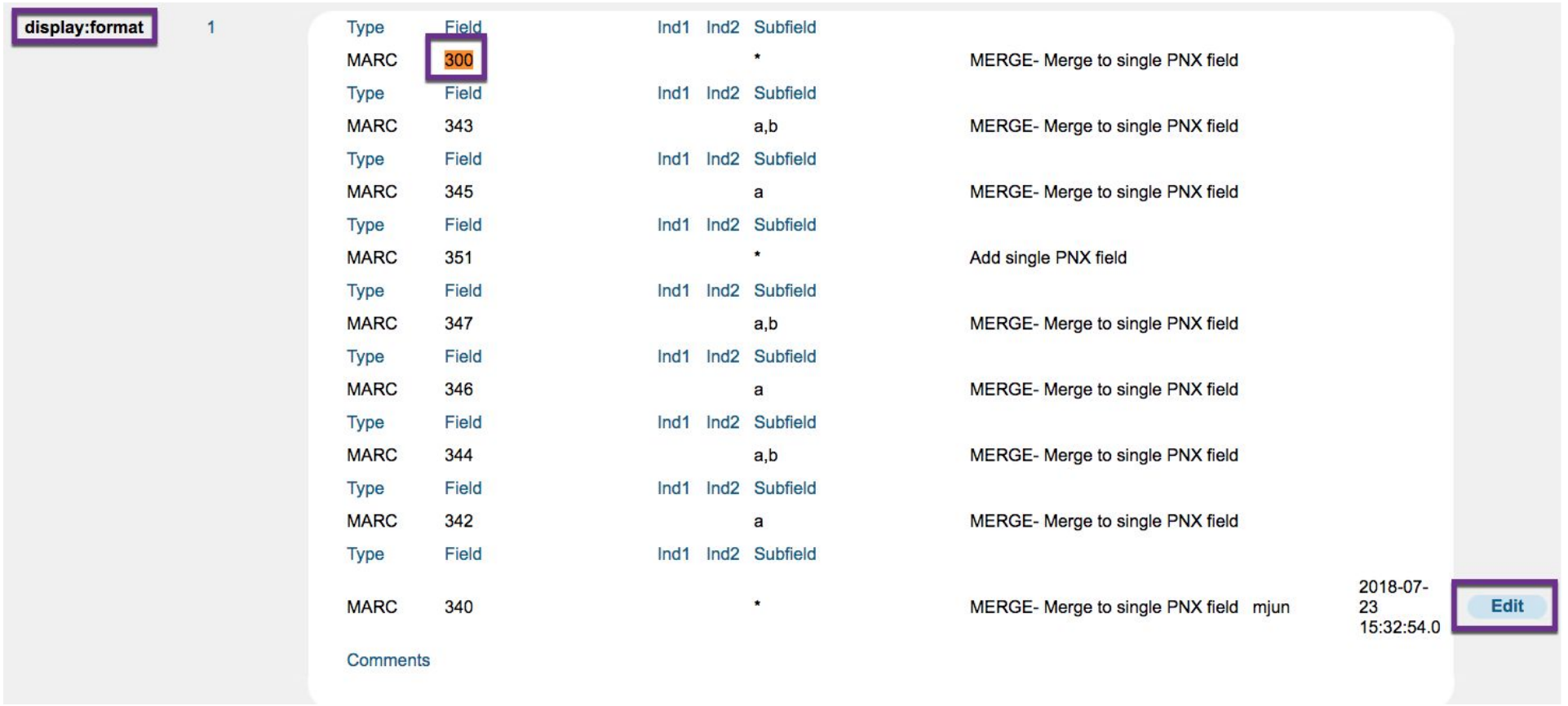
Marc	Display?	Subfields
020	*Yes*	*a*
242	*No*	
263		
340		
348		
351		
362		
380		
541		

Adding a norm rule

When you're adding a new norm rule, first you have to find the PNX field (ex: display:title, display:publisher…) that it best fits under.

For example, I want to add the 310 field (current publication frequency) along with the other 3xx fields.

In the list of norm rules, I search for the 300 marc field and find that it and other 3xx fields are included in the display:format PNX field.



Order of fields, subfields

You'll notice that in the listing of the 3xx fields, the fields are in random order. I think that the Marc fields display in Primo based on the order in the Marc bibliographic record. And I think the same applies to the display of subfields too.

For example, the Primo norm rule for the 505 field includes the subfields in alphabetical order: a,g,r,t.

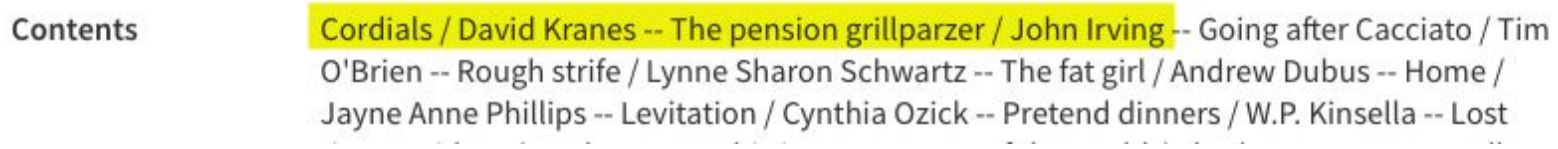
Type	Field	Ind1	Ind2	Subfield
MARC	505			a,g,r,t

But in Primo, the subfields display based on their order in the bib record.

Primo example:
https://csun-primosb.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CALS_ALMA71431773290002901&context=L&vid=01CALS_UNO&search_scope=EVERYTHING&tab=everything&lang=en_US

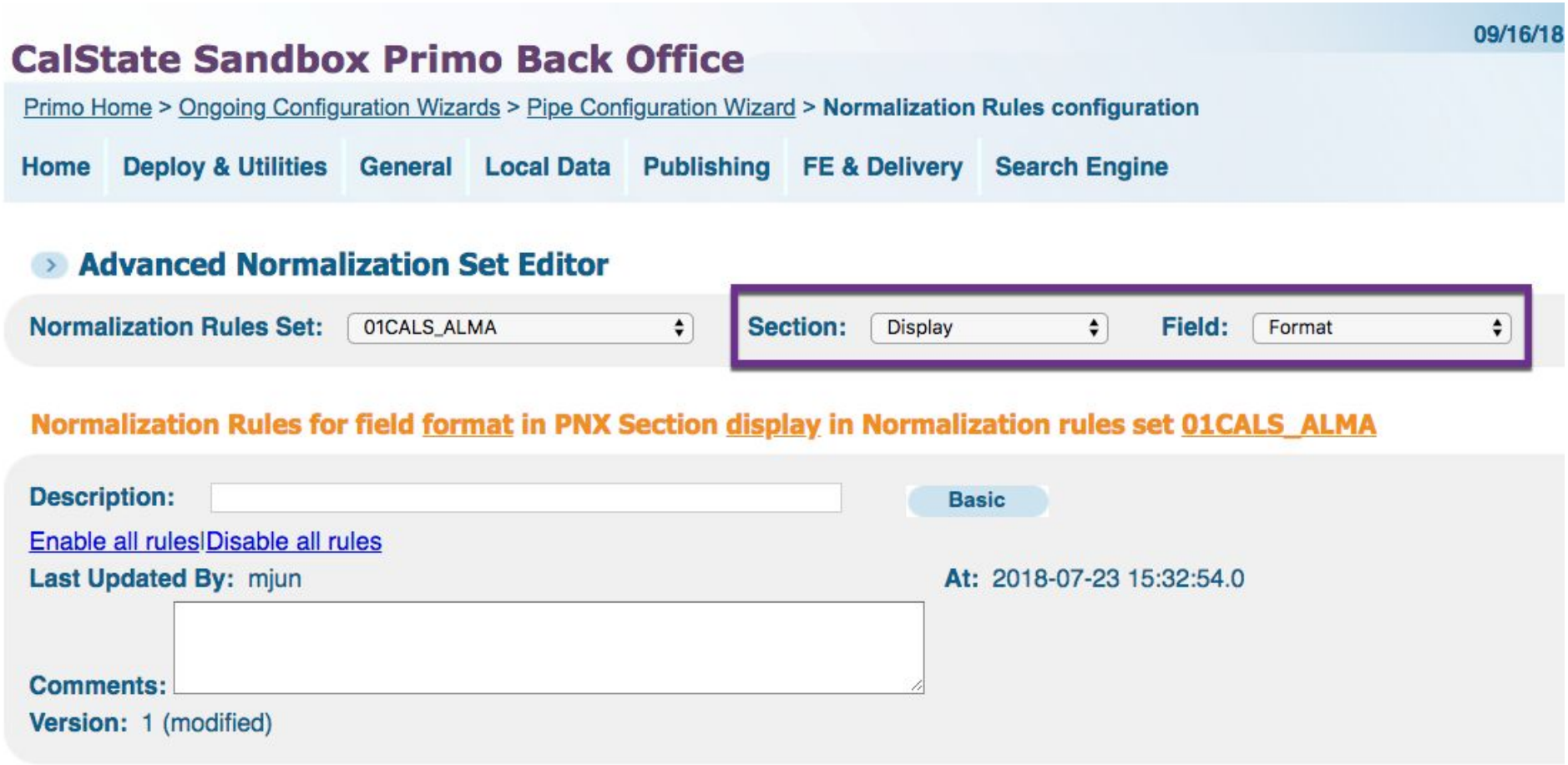
Marc record
505 00 $t Cordials /$r David Kranes --$t The pension grillparzer /$r John Irving…

Primo display



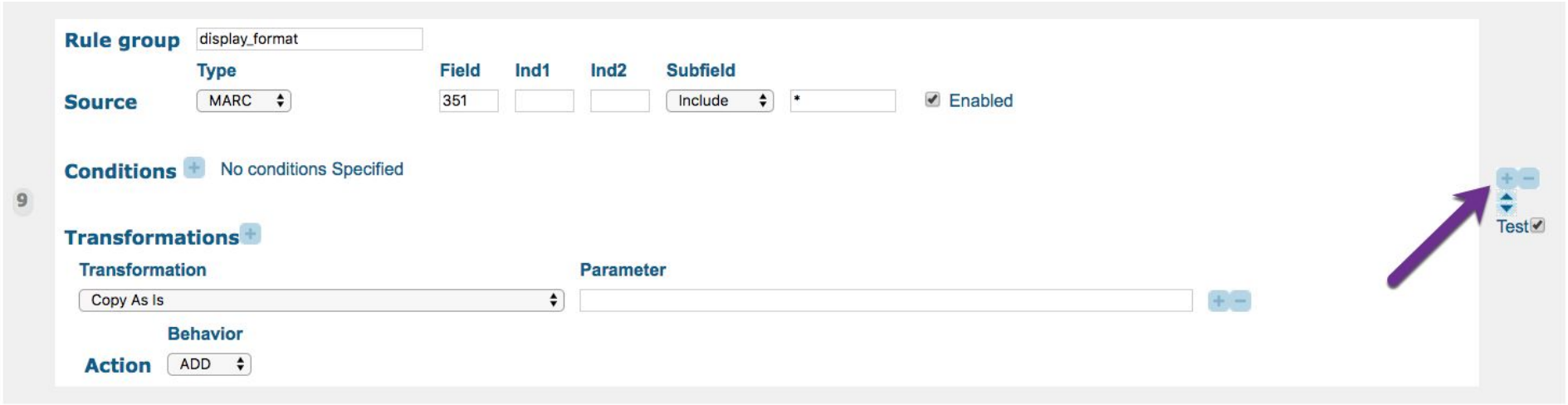
If I'm mistaken or you find evidence to the contrary, please let me know so I can update this google doc.

For the 310 field, I will edit the rules in display:format.

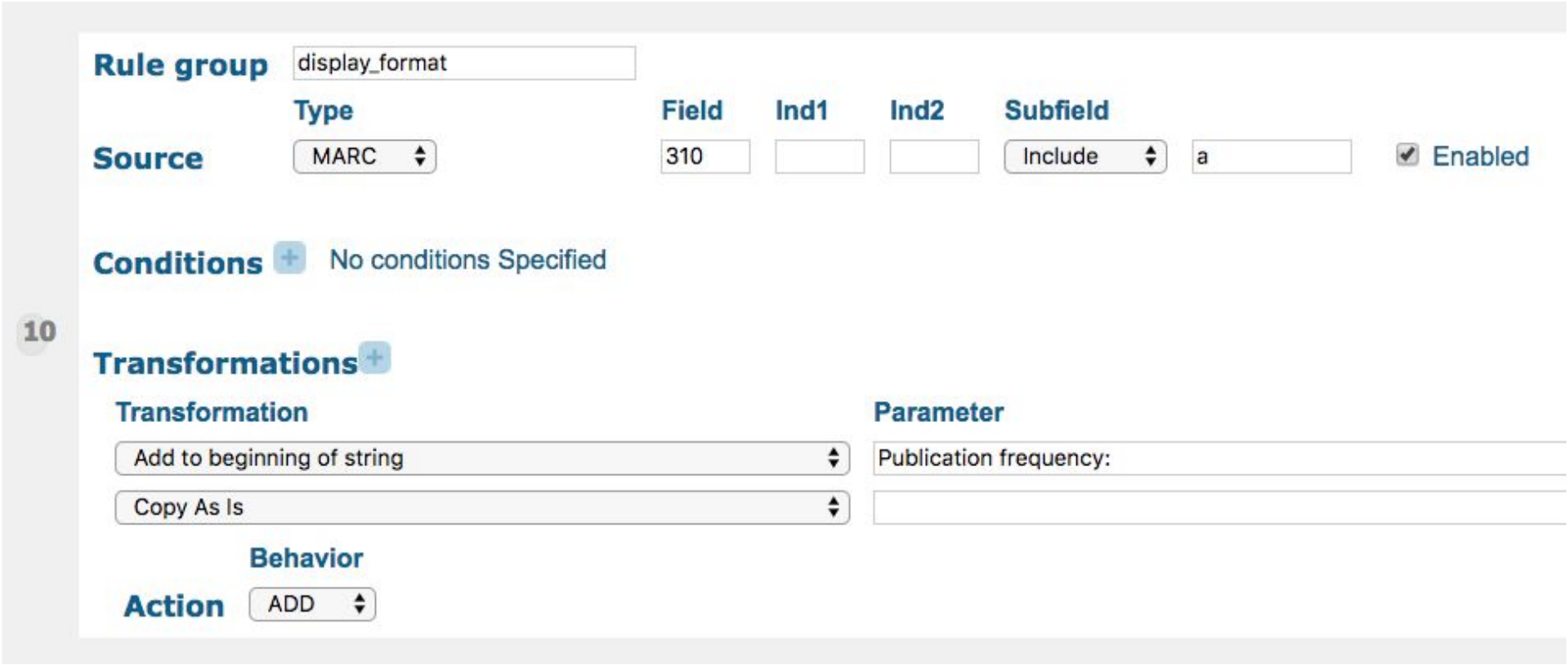


(Usually I add new norm rules below existing rules. You don't have to do this. When I'm testing I just find it easier to locate my rule if it's at the bottom.)

The last rule in display:format is rule 9. To add a new rule, I click on the plus (+) icon which duplicates the current rule, instead of creating a blank rule. (It's weird but it's just one of the quirks of working in the back office.)



Rules in detail



Exlibris documentation:
https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/040Editing_Normalization_Rules_Sets

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/070How_to_Edit_the_Normalization_Rules

Rule group: no need to edit. the rule group is the PNX field you're working in. (in the example above, display:format)

Source: MARC. Our group only works with Marc data from Alma.

Field: the specific Marc tag. (Unfortunately you can use wildcards like (5** or 5xx). You have to specify each Marc tag by its numbers. It's frustrating but it's just how the back office works.)

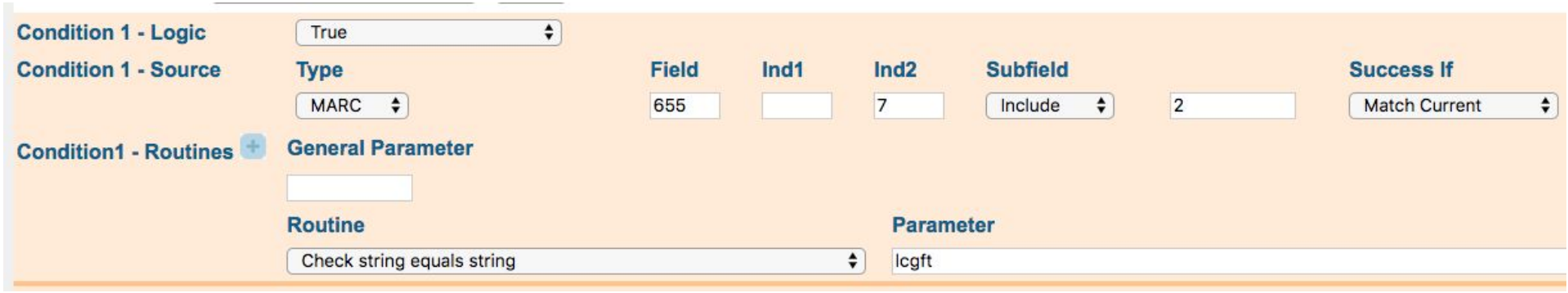
Ind1, Ind2: where you can specify indicators. If blank, you're selecting any and all indicators.

Subfield: Include or Exclude. "Specify the subfields that you want to exclude or include". Use a comma to separate multiple subfields. Asterisk (*) is used to specify all subfields.

Enabled: You can enable or disable a norm rule with this checkbox. It's good to use when you want to preserve an existing norm rule but disable it. Then you can add a new norm rule to test. If the new norm rule fails or behaves unexpectedly, you can delete the new norm rule and enable the existing one.

Conditions: You can set up conditions that determine if a field displays or not.

The condition below looks for 655 _7 where $2 is lcgft.



Transformation: You can take the Marc data as-is or make changes to it.
https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/050Transformation_Routines

(Most of the time you'll be using "Copy as is". I don't think we'll be doing much complicated transformations of Marc data.)

Action Behavior:

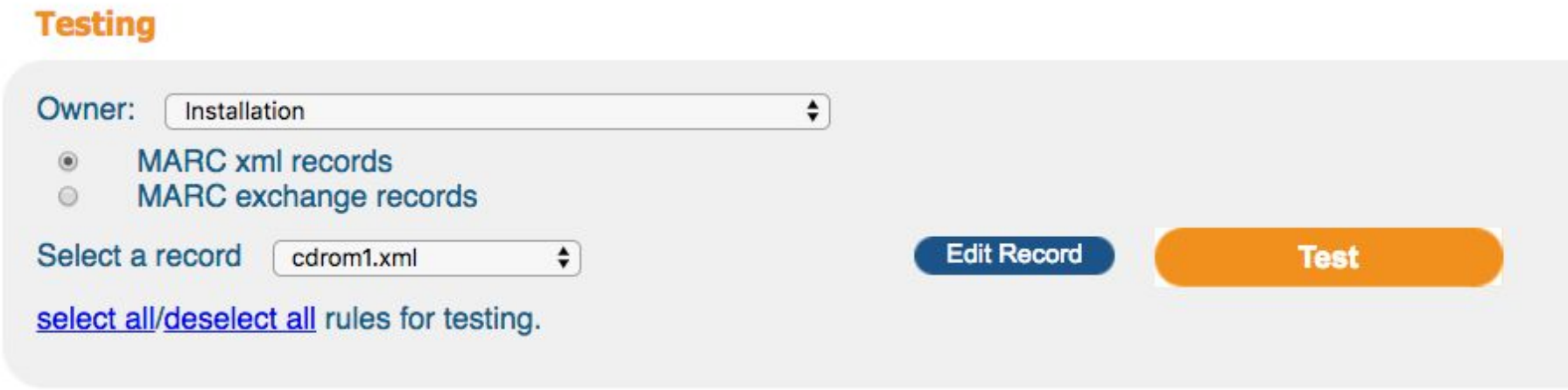
Add: adds a new "line" in Primo display for this norm rule

Or: only a single PNX field should be created. Once that field has been created, the system stops checking the remaining rules. (I've never use this.)

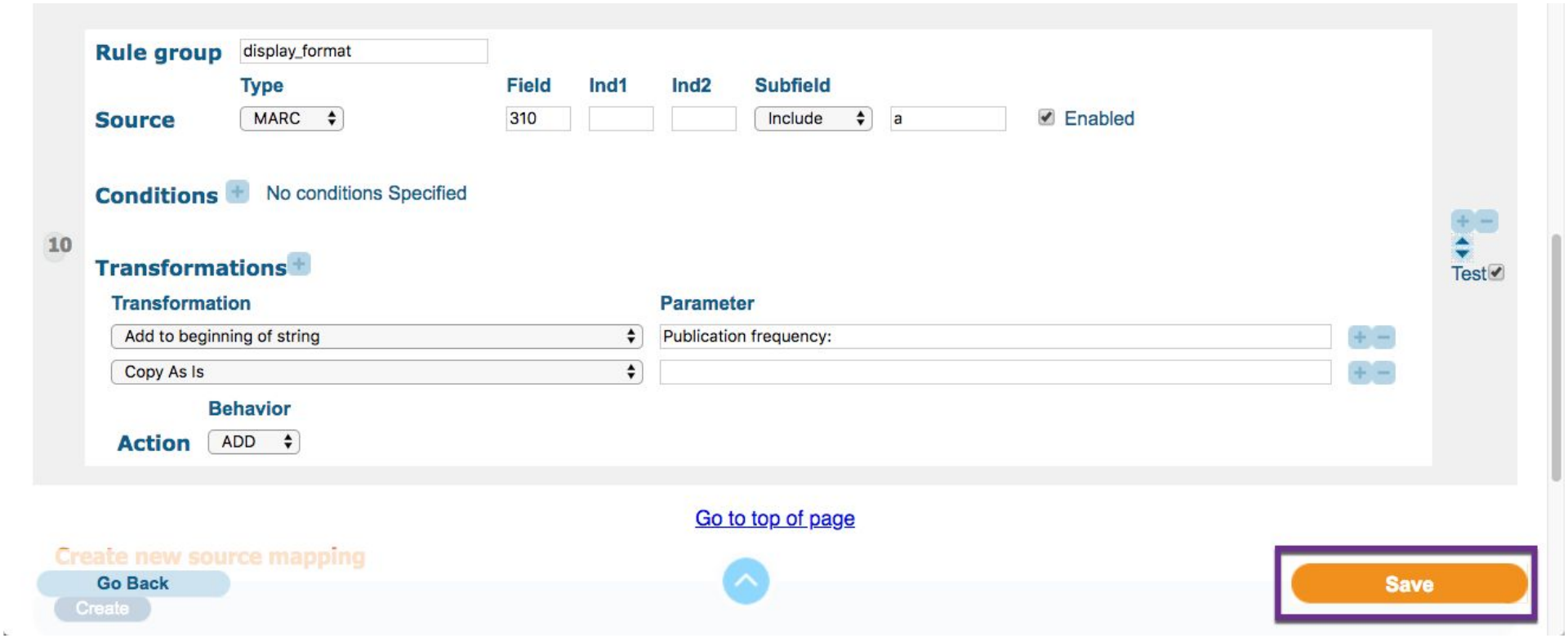
Merge: "merge all occurrences of the source fields to a single PNX field"

> https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/040Editing_Normalization_Rules_Sets#The_Top_of_the_Normalization_Set_Editor_Page
>
> In general use Add but this is something you can play around with and test in the Sandbox.

Test: There is an option to test your norm rule but it uses generic data. (And I also forgot how it works.) I prefer to test on records I found in the Primo Sandbox.



After you finalized your norm rule, you save.



(The Back Office doesn't give you a confirmation message. You click Save and then it just reloads the webpage.)

Sandbox renorm

To see the changes my new norm rule made, I will have to do a renorm.

For the procedure, follow steps #3 (Deploy norm rules) and #8 (Run renorm) here:
https://docs.google.com/document/d/1NG0Kv4zOXN1QsreHArl_EG7q7Jf4Lgtb0lLlp-0Xxcc/edit#heading=h.nqbda731e29y

(I don't expect new members of the task force to do a renorm. Most of your work will be adding and editing norm rules and I will do the renorms. But I'm including the renorm procedure so you have an idea of the entire process.

Production renorms take about 3 days (72 hours) while a sandbox renorm takes about 2 hours. This is another reason we test in the sandbox. It's much quicker to see the changes we made.)

Tips

Much of my experience in the Primo back office has been through trial and error and examining existing norm rules to create new ones.

Most of your work will be in the sandbox. At first I was afraid of ruining or seriously messing up Primo but that's why we have the sandbox.

You can always back up existing norm rules by printing to PDF the webpage of existing rules before you make any changes.

I also use screenshots to document before and after.