

Primo Experience at Northwestern University so far..... !

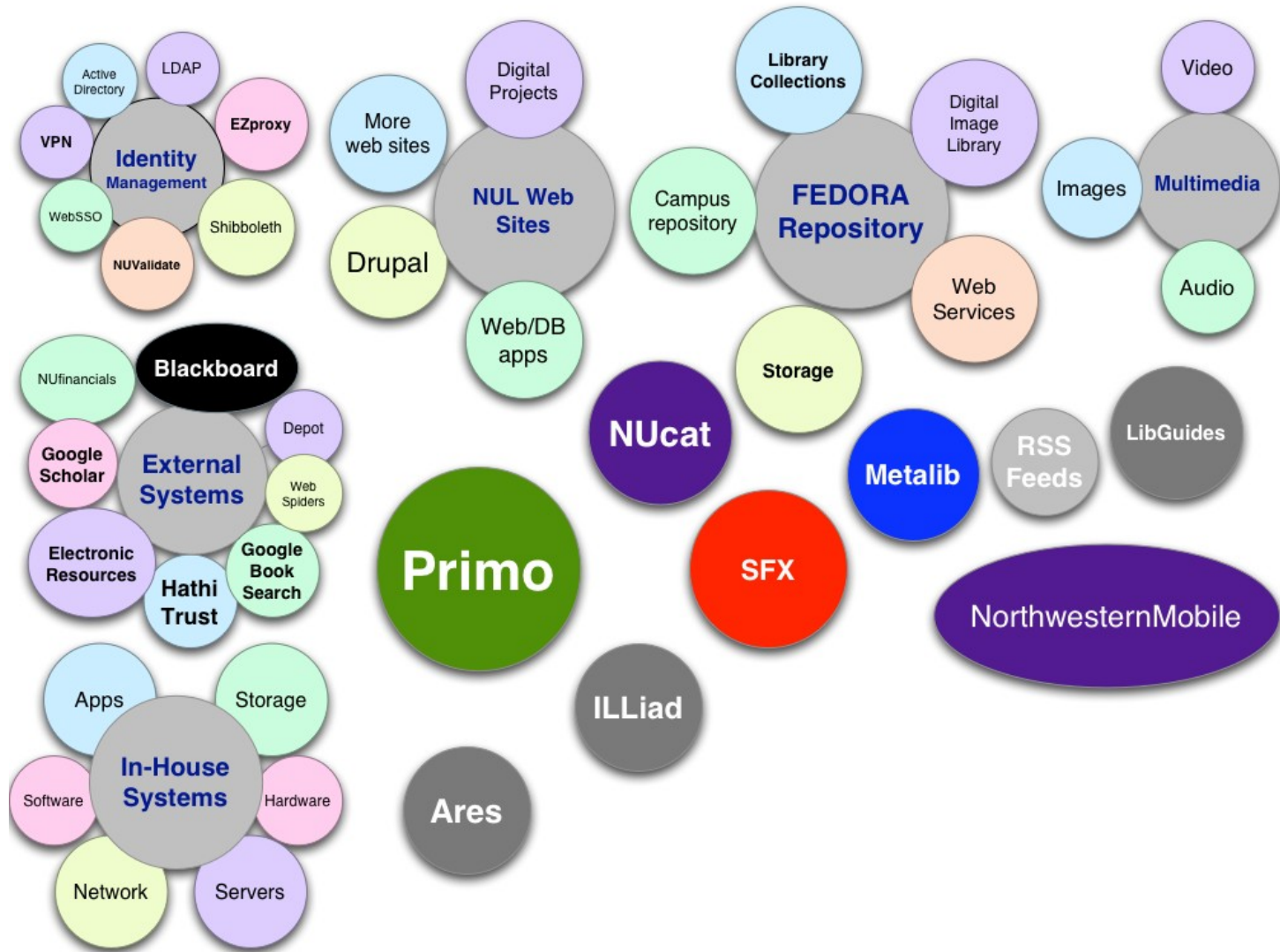
Michael North
Sr. Systems Administrator / Programmer
m-north@northwestern.edu

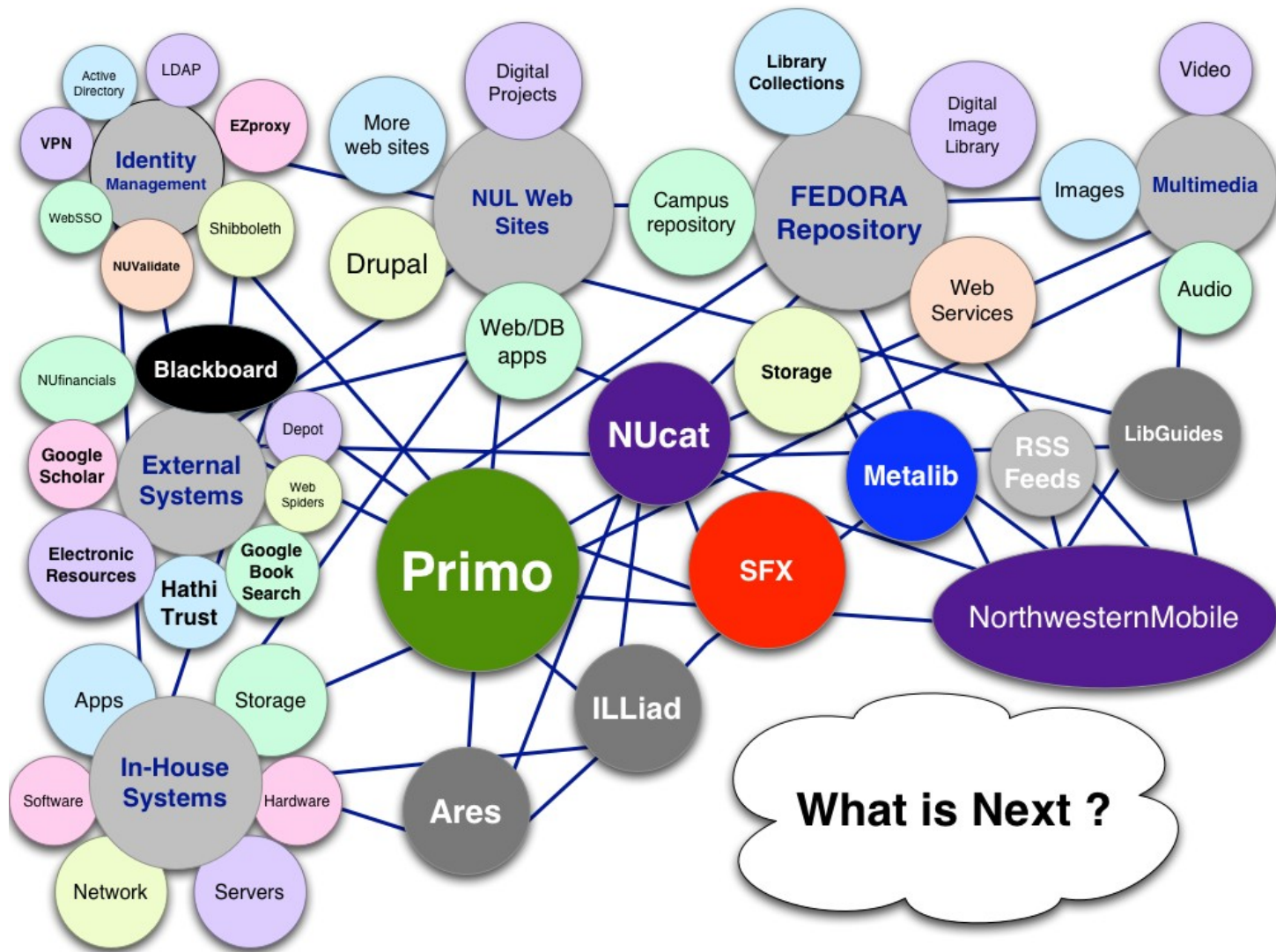


**NORTHWESTERN
UNIVERSITY**

**Introduction
and Why I
chose to do
this when we
aren't "live"
yet**







User Expectations

- Anytime and Anywhere
- One place
- Fast
- Easy
- Integrated



NU Starting Point

Applications Under the Primo Umbrella

- Voyager
- SFX
- Metalib
- Repositories (local) (ex: Africana Images)
- Repositories (remote) (ex: Hathi Trust)
- Primo Central
- bX



Start Implementation



PreImplementation Steps

Once we were told that the contract was signed.....

- Several meetings to decide who should come to the meetings !
- ExLibris provided forms that needed to be filled out.
- Hardware purchased and configured (decisions)
- Setup decisions need to be made - VM or not to VM ?
- Setup original Primo Implementation Group



Form 1 : Implementation Team Members Form:

Provide list of team members and their roles (Proj Management, System Administration, Data Management, Front End Management, Interoperability Management)

Name	ROLES:	Proj Mgt	Sys Admin	Data Mngmnt	Front End Mngmnt	Interoperability Mngmnt
Geoff Swindells		X		X	X	
Michael North		X	X			X
Stu Baker		X	X			X
Gary Strawn				X		X
Geoff Morse					X	
Julie Patton				X	X	X
Thomas Howell			X	X	X	
Bridget Canavan				X	X	
Dave Bonebrake				X	X	X
Mark Berendsen				X	X	X



Revised Implementation Committee

***Views and Search/Results Interface ***

Charge: Setup and customize the Primo User Interface (UI) based on usability research and "needs" of the NU community. Turn the out-of-the-box Primo into NU Primo through changes to the user interface coupled with normalization rules.

Domain Lead, Technical Lead, Backup, 14 total people

*** Normalization Rules/Facets and Collection Development ***

Charge: Document and fine-tune normalization rules for existing data sources, and identify additional data sources for integration in the coming year. Work with the Interface work group to ensure that normalization rule sets meet user needs.

Domain Lead, Technical Lead, Backup, 11 total people

Systems

Charge: Setup, Proceduralize, and Document server related "support" activities, including (but not limited to) backups, import/exporting, indexing procedures and other one-time and scheduled maintenance procedures. Communicate with NUIT systems staff as needed.

Domain Lead, Technical Lead, Backup, 5 total people



Early Implementation Steps

- Need to setup an "online collaboration environment" website to store documents and blog comments....a means of communication for the Implementation group. (Sharepoint vs. Confluence - we chose Confluence)
- Setup an internal email listserv to facilitate communications
- Agree to a basic timeline - goal (about 3-6 months)
- Equipment installed after getting sizing recommendations from ExLibris (after db analysis)



NU Primo Implementation Team

This is the home page for the [NU Primo Implementation Team](#).

[Contacts](#)

[Attachments \(docs - ppts- etc\)](#)

[Primo Sites Bookmarks](#)

[Primo Implementation Forms 1-8 \(to be filled out\)](#)

[Questions To Be Answered](#)

[IP Addresses Team Assignments and Forms](#)

[Team Assignments and Forms](#)

[Blackboard Group Pages](#)

[Training Requests 25Sept2009](#)

Comments ([Hide](#) | [Add Comment](#))



[Michael North](#) says:

Welcome to the NU Primo Implementation Team website. This site is configured to aid in the sharing of information critical to the development of the NU Primo application. As you find information that might be beneficial to others of the team, please feel free to add it.

Oct 10, 2008 14:06 ([Permalink](#) | [Edit](#) | [Remove](#) | [Reply To This](#))



Early FORMS 1-8 to Fill Out

Form 1 : Implementation Team Members

Form

Form 2: Institution List Form

Form 3: Institution IP Address Mapping

Form

Form 4: Institution data Source Mapping

Form

Form 5: Library List Form

Form 6: Data Sources

Form 7: Harvesting Methods for NON-Ex

Libris Data Sources

Form 8: Sample File Locations



Form 6: Data Sources :

Identify Data Sources and provide information about data sources we plan to harvest in our Primo installation.

(fill in by Proj Management Group)

Source ID	System and Version	System Type	Format	Est. Nbr. Of Records	Institution Code	Planned STP
NUCat	Voyager version 6.5.1	ILS	MARC	4,500,000	NWU	Priority 1
ArtSlide	Voyager version 6.5.1	ILS	MARC	157,000	NWU	Priority 1
AfricConf	Voyager version 6.5.1	ILS	MARC	135,000	NWU	Priority 1
AfricVert	Voyager version 6.5.1	ILS	MARC	25,000	NWU	Priority 1
Tran	Voyager version 6.5.1	ILS	MARC	327,000	NWU	Priority 1
?	Metalib version 4.0	Federated Search	?	702	NWU	Priority 1
?	SFX version 3.0	Link Server	?	240, 000	NWU	Priority 1
*	above includes sfx DEC KB update			(150,000)		
NUFed?	Fedora version 2.0 (3.0 in January 2009)	Digital Repository	Dublin Core	94,000	NWU	Priority 1
*	above includes:					
*	MDID			(80,000)		
*	Winterton			(10,000)		
*	Seige and Commune of Paris			(1220)		
*	Curtis Photographs			(743)		
*	African Posters			(591)		
*	Transportation Lib Menu Collection			(382)		
*	WWII Posters			(358)		
*	16th-19th Century Maps of Africa			(113)		
*	G.V. Black Manuscripts, Correspondence, and Photographs			(200)		
NULib?	Springshare LibGuides	CMS	Dublin Core	138	?	Priority 2

Views Group

Implementation Steps

- Create Attack Plan
- **Institution** setup
- **Views** (who and how many - Main - Medical - Law - United - Qatar - NU Mobile)
- **Tabs** - how to divide data search for each view (Books - Articles - Combined)
- **Scopes** - for each group of records
 - Voyager - Hathi Trust - Visual media collection - Multi-media Learning Center
 - Fedora - Africana Vertical File Index - Africana conference papers
 - Transportation file
 - Remote search scopes - Created from Metalib quicksets
- Look at other institutions (Iowa - Minnesota - BYU - Vanderbilt - Boston College)
- **Tiles** Basic search - Advanced search (attributes) - Main Menu - Static html -

Full Details attributes - Fields to display in full results

***Sequence:** take one piece at a time and experiment with look and feel :
Northwestern Facets, General view attributes, tab configuration, layout of facets,
header links and other general attributes.



Normalization Group Implementation Steps

- **Document existing Normalization Rules** (daunting task - see Oracle SQL / MS Access example later in these slides.
- **Tweak Existing Normalization Rules** to fit up with our existing data
- **Identify other Data Sources** for inclusion in Primo - what can we (should) include in our Primo application.



Is Data Being Presented Correctly ? (checklist)

A		C
Guidelines:		Comments
<p>Search queries: In the test cases below we recommend to execute specific search queries. These are examples of common search term, they are not obligatory. You can search for any term exists in your library.</p> <p>Customer configuration: Each customer has it's own configuration. In some test cases below we refer to local tab, remote tab or scope, different views and consortium setup. We recommend using the test cases below as guidelines for testing your specific configuration.</p>		
Sub Topic	Test Case	
The following checks should be done in every view, local tab/scope (based on customer configuration)		
Search box	Check that search can be limited by resource type (e.g. Journal) and search field (e.g. Title)	OK
	Check the Advanced Search functionality. Make sure you can limit by publication date, language and material type.	#####
	Check the My Preferences functionality. Make sure you get the correct results. Repeat the test twice: once as signed in user and once per session (not logged in)	Not quite sure what the correct results are, since sign-in doesn't work
Did you mean	Search for 'shakspare' in any view. See that you get correct Did you mean results.	OK
Brief Results	Brief results display check. Search 'computers' in every view in the Local Tab/Scope. Make sure all fields exists and displayed correctly.	OK.
	Check availability status and location information display.	OK. But would like to see bubble view for all records with tangible
	Facets display check. Search for 'test' and see that facets are displayed properly. Collection facet check - check that label is 'collection' and <u>collection names</u> are displayed properly. Check also for facets results content.	OK. But we were wondering if the sort order of the facets can be configured. We would like to add
	Click on one of the facet results, check that the search is re-executed and the results are correct. And then click on the 'remove' link in the search box to check if the original search is re-executed.	OK
	Check top level facets. Under Results there are two top level facets prefaced by the text 'Show only': Online items and Items currently in the library.	OK
	Check Suggested New Searches option.	OK
	Check the option to Save query and go to the e-shelf to check if it was saved.	OK
Full Results	Full results display check. Search 'computers' in every view in the Local Tab/Scope. Check that all fields in the full view are	OK

Systems Group Implementation Steps

- Server side operations
- Import / export operations
- Oracle Utilities
- Backup / Restore operations
- BackOffice Administration (oversight)
- **ORACLE ! ! !** I necessary skill set....at least "understanding."

Primo allows the administrator much more Oracle functionality they can perform using "utilities" setup by ExLibris....but you still need to understand what it does.



TimeLi ne



The Ever Changing Timeline

Be prepared to expand – this project can have a life of its own.

ExLibris Timeline includes:

- Schedule Installation

- Developer Docs and Project Plan

- Customer Profile work

- Software installation

- Training schedule

- Voyager pull and presentation to customer (sample and production)

- Onsite training

- Testing

- Production Load

- Switch On



We Started With



Needle Library, Haystack College

You ask – we deliver

[New Search](#) [Tags](#) [A-Z Journals](#) [A-Z Databases](#) [Help](#)

Books & more

Articles & more

Search for

GO

 Look for my query: that contain my query words
[New Search](#)[Advanced Search](#)

Featured Search Topics

- > Talk of the day: [Discovery landing](#)
- > Now on campus: [Shakespeare's Hamlet](#)
- > Everything about: [African dancing](#)

Help for Searching

- > Need [help](#) researching a subject?
- > Looking for [on-line material](#) off-campus?
- > Looking for some [good music](#) for a party?

Hello, Guest

[Sign in](#) for full access

Guest e-Shelf

[? Help](#)[My Preferences](#)

Library services

Help from a Librarian - Ask a Question

Contact a librarian personally, by E-mail, by chat or by phone. Schedule an individual meeting with a subject or an instruction librarian.

[→ More](#)

Borrow Items

How the circulation works: borrowing and returning items, loan periods, renewals and requests.

[→ More](#)

Research Assistance

How to do research at the library: learn how to use the library resources by completing an interactive tutorial.

[→ More](#)

Course Reserves

Get tips for your classes and find both print and media course reserved material.

[→ More](#)

Students with Disabilities

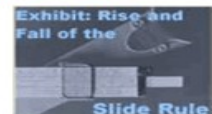
The university libraries are committed to serving all members. For special assistance: address library service desk, call or make an appointment.

[→ More](#)[More Services](#)

Library News and Events

New Exhibition!

Meet the designer Karim Rashid and his products...

[More](#)

Activity hours

Monday-Thursday	07:30am-10:00pm
Friday	07:30am-06:00pm
Saturday	10:00am-06:00pm
Sunday	12 noon -06:00pm

[> Summer Semester Hours](#)[> Semester Break Hours](#)

The library will be closed:
August 7th and 8th

[More](#)

What We Did



NORTHWESTERN UNIVERSITY **LIBRARY**

Today's Main Library hours: 8am

[NUcat \(library catalog\)](#) [All Databases](#) [e-Journals](#) [Research Guides](#) [Course Reserve](#)[Books, Media & more](#)[Articles & more](#)[Combined Resources](#)

Search for

GO



All items ▾

my search words ▾

anywhere ▾

[New Search](#)[Advanced Search](#)

Hello, Guest

[Sign in with your NetID](#) for full access[Guest e-Shelf](#) /11[? Why should I sign in?](#) [My Preferences](#)

Welcome to the Library's new search tool for the Library's vast collection of books, journals, videos, sound recordings, journal and newspaper articles, digital images and more.

Select "**Books, Media & more**" to search for books, journals, videos, maps, music, e-texts, archives & manuscripts, images & more.

Select "**Articles & more**" to search for articles, reviews, reports, patents, e-journals & more.

Select "**Combined Resources**" to search all of the above.

[Need research assistance?](#)

Internal "live" Launch

Library Internal Review Only

- Library Launch (currently) with Log and Comment Web Pages.
- Setup an email account to allow staff/faculty to send in comments.
- Library website tracks comments, action items, and when they are completed.
- University Wide review period later this spring.



Educate Early and Often

So staff/students know why we are
doing this!

NU Library Tech Talk :

Primo and Federated Searching

*Next Generation Discovery Tool
for NU Researchers
(examples from a law research perspective)*

Michael North

November 20, 2009

Library Technology Division

What was Difficult

(besides the ever
expanding
Timeline!

The Good, the Bad, the Ugly

Pages - Documentation -

432
378
172
125
174

Time and dedication responsibility....almost double docs if doing an upgrade - do not upgrade during imp maybe

Name	Date modified	Type	Size
Primo_Administrator_Guide.pdf	5/5/2010 9:42 AM	Adobe Acr...	7,970 KB
Primo_3.0_Customization_Guide.pdf	5/5/2010 9:42 AM	Adobe Acr...	3,327 KB
Primo_Technical_Guide.pdf	5/5/2010 9:41 AM	Adobe Acr...	3,284 KB
Primo_Interoperability_Guide.pdf	5/5/2010 9:41 AM	Adobe Acr...	2,555 KB
v1-Customer_Profile_for_Primo.doc	10/2/2008 11:54 AM	Microsoft ...	2,417 KB
Integration of PDS with Shibboleth.ppt	2/16/2010 4:14 PM	Microsoft ...	1,674 KB
Primo_System_Administration_Guide.pdf	5/5/2010 9:41 AM	Adobe Acr...	1,569 KB
Primo_Version_3.0_Highlights.pdf	5/5/2010 9:43 AM	Adobe Acr...	1,554 KB
Patron Dir Services and Authentication Issues.ppt	2/16/2010 4:14 PM	Microsoft ...	1,428 KB
PDS+Patron+Directory+Services+ Guide.pdf	12/16/2009 4:26 PM	Adobe Acr...	1,401 KB
Primo_API_Guide-2--8Aug.pdf	10/2/2008 11:45 AM	Adobe Acr...	1,311 KB
PrimoImplementation-TipsTricks.pdf	2/16/2010 4:18 PM	Adobe Acr...	1,272 KB
Primo_V3_0_0_RN.xls	5/5/2010 9:42 AM	Microsoft ...	963 KB
Oracle Maintenance and Configuration.ppt	2/16/2010 4:14 PM	Microsoft ...	925 KB
PrimoAdvancedConfigurationOptions.pdf	2/16/2010 4:16 PM	Adobe Acr...	672 KB
PrimoSearchEngineArchitecture.pdf	2/16/2010 4:19 PM	Adobe Acr...	610 KB
Primo Service Pack Installation Guide - July 2009....	3/10/2010 3:27 PM	Adobe Acr...	591 KB
Primo API Overview and Practice.pdf	2/16/2010 4:15 PM	Adobe Acr...	474 KB
Primo_Service_Pack_Installation_Guide.pdf	5/5/2010 9:42 AM	Adobe Acr...	445 KB
Primo_Online_End_User_Help.pdf	5/5/2010 9:41 AM	Adobe Acr...	439 KB
Requirements_for_Primo_3.0_Installation.pdf	5/5/2010 9:42 AM	Adobe Acr...	403 KB
PrimoPublishing.pdf	2/16/2010 4:18 PM	Adobe Acr...	367 KB
Primo+ Upgrade+ Kit+ Installation+ Guide.pdf	12/16/2009 4:00 PM	Adobe Acr...	364 KB
CustomizePrimo.pdf	2/16/2010 4:16 PM	Adobe Acr...	246 KB
PrimoNormalizationRules.pdf	2/16/2010 4:18 PM	Adobe Acr...	233 KB
Requirements_for_Upgrading_from_Primo_V2_to...	5/5/2010 9:42 AM	Adobe Acr...	217 KB
PrimoWorkingWithNormalizationRules.pdf	2/16/2010 4:19 PM	Adobe Acr...	192 KB
Primo_Upgrade_Request_Form.doc	5/5/2010 9:42 AM	Microsoft ...	161 KB
Primo_V3_0_0_RN.pdf	5/5/2010 9:42 AM	Adobe Acr...	128 KB
Primo V 3 Condensed Highlights.pdf	5/5/2010 9:54 AM	Adobe Acr...	79 KB

UI Changes - big picture

- Server File Changes
- Back Office changes
- Change the Needle Library Icon story
- Need to master the documentation first !



Lessons Learned - Early Implementation

- Development of job criteria and checklists for the Views, Normalization, and Systems Groups is critical early on.
- Needed to expand the timeline to include more granular milestones. Be realistic. Be more detailed.
- Too many cooks a necessity ?
- Do the heavy hitters have the time commitment. Time commitment is not understood. This project is BIG !



Above and Beyond the Vanilla Primo



LDAP and Shibboleth Implementation

LDAP: we now use LDAP for patron authentication instead of PDS.

Shibboleth: some problems prevent us from implementing now but should in the near future. (versions and cookie problems)

*** Shibfest will be held at Northwestern this summer.



Added Harvesting Pipes Haithi Trust and local Fedora

NWU Primo Production Back Office

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Pipe Configuration Wizard](#) > [Data Sources Configuration](#)

> Data Sources

Institution:

Data Source List

Source Name	Source Code	Description	Source System	Source Format
ACPDB	acpdb	Data source for ACPDB Voyager database	Voyager	MARC21
ARTDB	artdb	Data source for ARTDB Voyager database	Voyager	MARC21
AVFDB	avfdb	Data source for AVFDB Voyager database	Voyager	MARC21
Fedora	fedora	Data Source for Fedora	Other	DC
Hathi Trust	hathi	Data Source for Hathi Trust repository	Other	MARC21
Metalib	metalib	Data Source for Metalib IRDs	MetaLib	MetaLib
Voyager	voyager	Data Source for all Voyager databases (nwuVoyager		MARC21



Oracle SQL Help for Table Review

How To Use Oracle SQL and MS Access

- Run Oracle SQL query and get list of all tables available.
- Run Oracle SQL queries to collect data from tables'
- Import Oracle data into MS Access table (create "access" tables).
- **Normalization Rules** ☐ Put into MS Access table. (done)
- **View Configurations** ☐ Put into MS Access table. (ongoing)
- Mapping and Code tables ☐ export for extra backup.
- Create "reports" from within MS Access **OR**
- Create Visual Basic (VB) program to create reports.



> Manage Normalization Rules

Normalization Rules Set: PNX Section: 

Display Empty PNX fields

Normalization Rules Set Attributes

Set Name: Set Description: Default Source Field Type: Enable:

Version: 14 (modified)

Normalization Rules for PNX Section control in Normalization Rules set NWU Voyager

PNX Field	Version	Source Field	Action	Updated By
control:sourceid	1	Type Value Config nmrules/control_sourceid	Add single PNX field	primo Edit
control:recordid	1	Type Value Config nmrules/control_sourceid PNX control/sourcerecordid	Add single PNX field MERGE- Merge to single PNX field	primo Edit
control:originalsourceid	1	Type Value Config nmrules/control_originalsourceid	MERGE- Merge to single PNX field	primo Edit
control:sourceformat	1	Type Value Config nmrules/control_sourceformat	Add single PNX field	primo Edit
control:sourcesystem	1	Type Value Config nmrules/control_sourcesystem	Add single PNX field	primo Edit

NWU Primo Production Back Office



[Primo Home](#) > [Advanced Configuration](#) > Full Normalization Rule Configuration

Hello Admin

> Advanced Normalization Set Editor

Normalization Rules Set:

Section:

Field:

Normalization Rules for field recordid in PNX Section control in Normalization rules set NWU Voyager

Description:

[Enable all rules](#) | [Disable all rules](#)

Last Updated By: Admin At: 2010-03-31 15:51:48.0

Version: 1

[Go to bottom of page](#)



Rule group

Type

Configuration XPath

Source

Enabled

Conditions No conditions Specified

Transformations

Transformation

Parameter

Behavior

Action ADD

Rule group control_recordid

Source Type PNX

Value control/sourcerecordid

Enabled

Conditions No conditions Specified

Transformations

Transformation Copy As Is Parameter

Action MERGE Behavior First delimiter First delimiter Space Repeat Number Remaining delimiters Remaining delimiters spaces

Go to top of page

Create new source mapping

Create

Testing

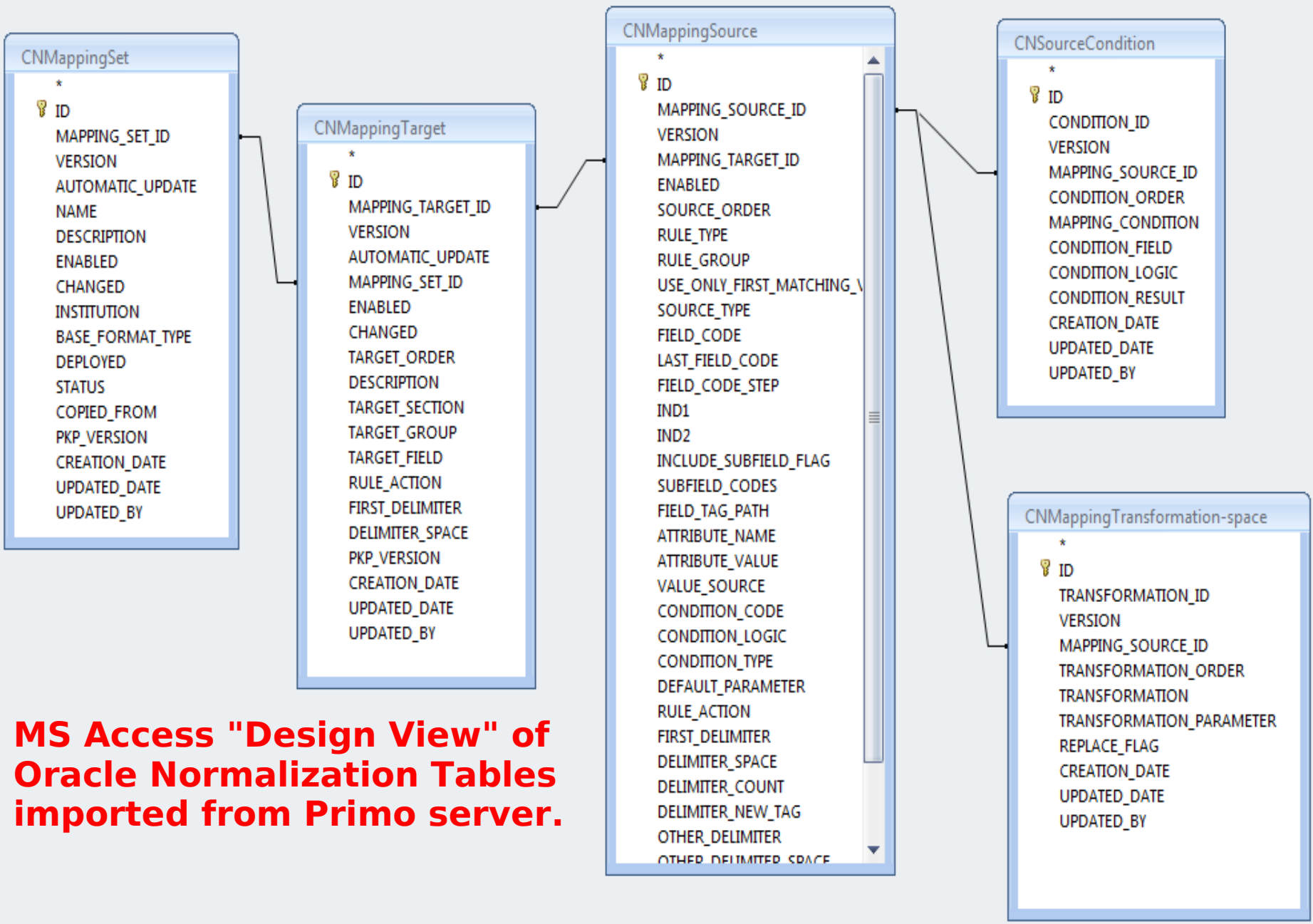
- MARC xml records
MARC exchange records

Select a record primo.export.090602115833.449413.0.xml

Edit Record

Test

select all/deselect all rules for testing.



MS Access "Design View" of Oracle Normalization Tables imported from Primo server.

control:sourceid ←
Description: ___ version 1 [MTID: 2341298]
Rule group: control_sourceid
Source: Config (XPath: nmrules/control_sourceid) [MSID 2341299] Enabled
CONDITIONS: none specified
TRANSFORMATION
Copy as is
Action: ADD

control:recordid ←
Description: ___ version 1 [MTID: 2341473]
Rule group: control_recordid
Source: Config (XPath: nmrules/control_sourceid) [MSID 2341476] Enabled
CONDITIONS: none specified
TRANSFORMATION
Copy as is
Action: ADD
Source: PNx (XPath: control/sourcerecordid) [MSID 2341474] Enabled
CONDITIONS: none specified
TRANSFORMATION
Copy as is
Action: MERGE. 1st delim . 1st delim space None. Repeat . Remaining delims . Remining delim spaces None

control:originalsourceid ←
Description: ___ version 1 [MTID: 2341915]
Rule group: control_originalsourceid
Source: Config (XPath: nmrules/control_originalsourceid) [MSID 2341916] Enabled
CONDITIONS: none specified
TRANSFORMATION
Copy as is
Action: MERGE. 1st delim -. 1st delim space None. Repeat . Remaining delims . Remining delim spaces None

control:sourceformat ←
Description: ___ version 1 [MTID: 2342426]
Rule group: control_sourceformat
Source: Config (XPath: nmrules/control_sourceformat) [MSID 2342427] Enabled
CONDITIONS: none specified
TRANSFORMATION
Copy as is
Action: ADD

control:sourcesystem ←
Description: ___ version 1 [MTID: 2342224]
Rule group: control_sourcesystem
Source: Config (XPath: nmrules/control_sourcesystem) [MSID 2342225] Enabled
CONDITIONS: none specified
TRANSFORMATION
Copy as is
Action: ADD

**Normalization Rules
Report (pulled from
MS Access tables)
written in VB by Gary
Strawn - NU**

**Landscape = 100
pages !**

```
MARC→100:*:*:Include:a,b,c,d,e,i,j,q,u → adddata_auf
MARC→100:*:*:Include:a,b,c,d,e,j,q,u → display_creatorf
MARC→100:*:*:Include:a,b,c,d,e,j,q,u → search_creatorcontribf
MARC→100:*:*:Include:a,b,c,d,q → dedup_f11f
MARC→100:*:*:Include:a,b,c,d,q → frbr_k1f
MARC→100:*:*:Include:f,g,k,l,n,p,t → search_addtitlef
MARC→100:-1,-2:*:*:Include:a,b,c,d,e,j,q,u → display_creatorf
MARC→100:-1,-2:*:*:Include:a,b,c,d,e,j,q,u → search_creatorcontribf
MARC→100:-1,-2:*:*:Include:a → facets_creatorcontribf
MARC→100:1,2:*:*:Include:a → adddata_aufirstf
MARC→100:1,2:*:*:Include:a → adddata_aulastf
MARC→100:1,2:*:*:Include:a → display_creator·(2·times)f
MARC→100:1,2:*:*:Include:a → facets_creatorcontribf
MARC→100:1,2:*:*:Include:a → search_creatorcontrib·(3·times)f
MARC→100:1,2:*:*:Include:b,c,d,e,j,q,u → display_creatorf
MARC→100:1,2:*:*:Include:b,c,d,e,j,q,u → search_creatorcontribf
f
MARC→110:*:*:Include:a,b,c,d,e,n → dedup_f11f
MARC→110:*:*:Include:a,b,c,d,e → adddata_aucorp
MARC→110:*:*:Include:a,b,c,d,e → display_creatorf
MARC→110:*:*:Include:a,b,c,d,e → search_creatorcontribf
MARC→110:*:*:Include:a,b,c,d,n → dedup_f11f
MARC→110:*:*:Include:a,b,c,d,q → frbr_k1f
MARC→110:*:*:Include:a,b → facets_creatorcontribf
MARC→110:*:*:Include:f,g,k,l,n,p,t → search_addtitlef
f
MARC→111:*:*:Include:a,b,c,d,e,n,q → dedup_f11·(2·times)f
MARC→111:*:*:Include:a,b,c,d,n,q → frbr_k1f
MARC→111:*:*:Include:a,b,c,d,n → adddata_aucorp
MARC→111:*:*:Include:a,b,c,d,n → display_creatorf
MARC→111:*:*:Include:a,b,c,d,n → search_creatorcontribf
MARC→111:*:*:Include:a → facets_creatorcontribf
MARC→111:*:*:Include:f,g,k,l,n,p,t → search_addtitlef
f
MARC→130:*:*:Include:* → search_alttitlef
MARC→130:*:*:Include:a,d,f,k,l,m,n,o,p,r,s → display_titlef
MARC→130:*:*:Include:a,d,f,k,l,m,n,o,p,r,s → search_titlef
MARC→130:*:*:Include:a,d,l,m,n,o,p,r,s,t → dedup_f11f
MARC→130:*:*:Include:a,d,m,n,p,r,s → display_unittitlef
MARC→130:*:*:Include:a,d,m,n,p,r,s → frbr_k2f
```

Normalization Rules INDEX of Marc tags (pulls from MS Access tables) *11* *pages*

Written in VB by
Gary Strawn of NU.

3 API Projects

- Medical School chose not to use the Primo webpage, but are working to design an API interface to conform to their other interfaces.
- BlackBoard "push/pull" integration building block.
- iPhone App - Terribly Clever Wiz Kids (?) from

Stanford



GALTER

HEALTH SCIENCES LIBRARY
of Northwestern University's Feinberg School of Medicine

einstein

Search

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[Home](#)[Find Resources](#)[Popular Resources](#)[Using the Library](#)[Request Services and Materials](#)[GalterLists](#)[Guides and Tutorials](#)[Home](#) > [Primo Demo](#) > Search Results

PRIMO LOCAL SEARCH

SEARCH

* Search for Search which fields? Phrase or Keywords? Records per page

Search

[Books, Journals and More \(1044\)](#)
[News \(4\)](#)
[Website \(0\)](#)
[GalterLists \(1\)](#)

Total Hits: 1044 -- Displaying: 1 to 10

1. [Einstein.](#) (book)

Author/Creator: Jeremy Bernstein 1929-
New York, Viking Press, 1973

Availability: available[Show/Hide Details](#)

Send Us Your
Comments



LIMIT SEARCH BY FACET

Author/Creator

- [Einstein, Al](#)
- [ebrary, Inc](#)
- [Holton, G\(1](#)
- [Albert Einst](#)
[Medicine\(9](#)
- [Stachel, J\(8](#)

Language

- [eng\(842\)](#)
- [ger\(152\)](#)
- [fre\(53\)](#)
- [und\(17\)](#)
- [ita\(13\)](#)

Format

- [books\(963\)](#)
- [media\(46\)](#)

Availability: available

[Show/Hide Details](#)

3. [Einstein](#). (book)

Author/Creator: Archibald MacLeish 1892-1982.

Paris, Black Sun Press, 1929

Availability: available

[Show/Hide Details](#)

4. [Fred Jerome](#), author, "The Einstein file" (video)

Author/Creator:

West Lafayette, IN : C-SPAN Archives, c2002

Availability: available

[Show/Hide Details](#)

5. [Einstein journal of biology and medicine \(Online\)](#) (journal)

Author/Creator:

Bronx, NY : Albert Einstein College of Medicine, c2003-

Availability: available

[Show/Hide Details](#)

Subject

- [Einstein, Albert, 1879-1955 \(261\)](#)
- [Relativity \(Physics\)\(140\)](#)
- [Physics\(97\)](#)
- [Physicists\(89\)](#)
- [Science\(82\)](#)

Availability

- [available\(998\)](#)
- [online_resources\(182\)](#)



**Primo will be
to this page w
development
complete.**

Home

Find Resources ▶

Popular Resources ▶

Using the Library ▶

Request Services
and Materials ▶

GalterLists ▶

Guides and
Tutorials ▶

Send Us Your
Comments



GETTING STARTED



FIND [journals, books and databases](#)



ORDER [articles and books](#)



CREATE, VIEW and SHARE recommended and favorite resources with
[GalterLists](#)



LEARN HOW TO USE [databases and software](#)



KEEP UP TO DATE with [RSS feeds](#)



VIEW [student and resident resources](#)

POPULAR RESOURCES

PubMed

OvidSPMEDLINE

NUcat

McGraw-Hill's
ACCESSMedicine

BOOKS@Ovid

CLINICAL
pharmacology

The Cochrane Library
Evidence for healthcare decision-making

EMBASE.com

EndNote

Journal Citation Reports®

MEDLINE Surve

LIBRARY NEWS EVENTS

- [New Electronic Journals 2010](#)
- [New Titles a](#)
- [New E-Reso](#)
[2010](#)
- [Announcing](#)
[Website Op](#)
[Devices](#)
- [New E-Reso](#)
[2010](#)
- [New Books i](#)
[January-Ma](#)
- [New Titles a](#)
[2010](#)
- [New Feature](#)
- [New E-Reso](#)
[2010](#)
- [New E-Reso](#)
[2010](#)

Northwestern ern Mobile

mobile.northwestern.edu



NORTHWESTERN
UNIVERSITY

5/25/10

Northwestern Mobile Apps

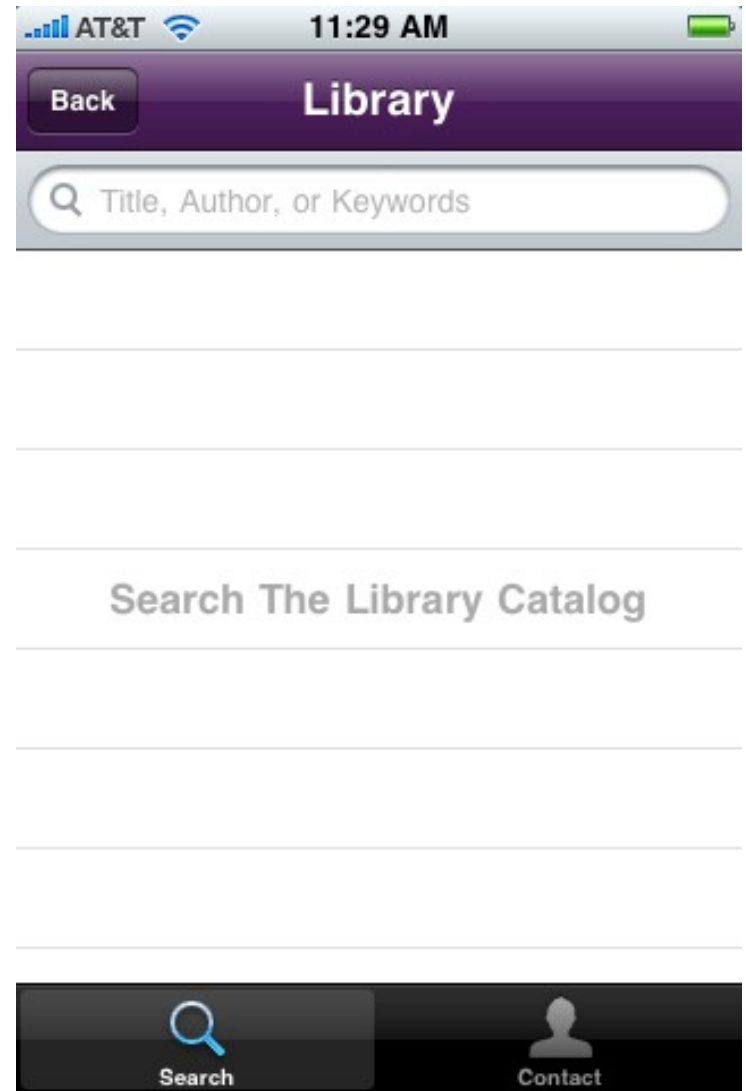
- News
- Events
- Maps
- Online Directory
- **Library**
- **Images**

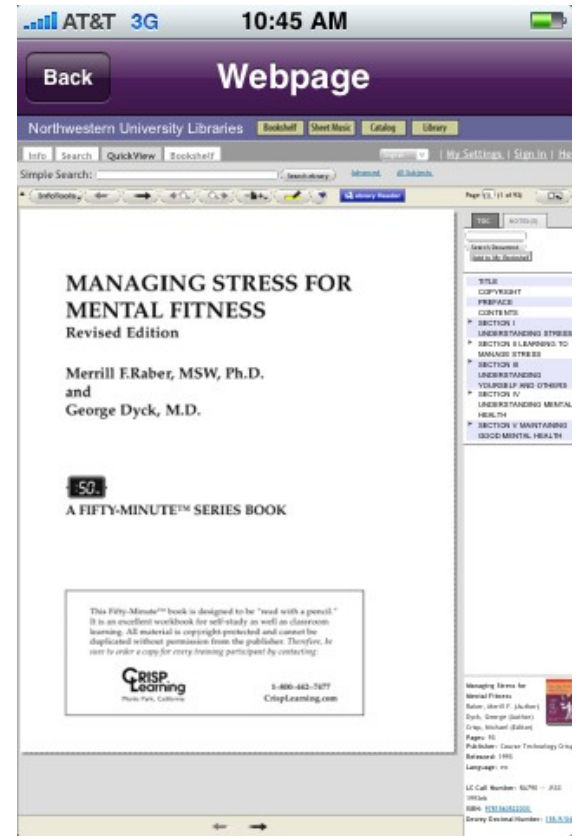
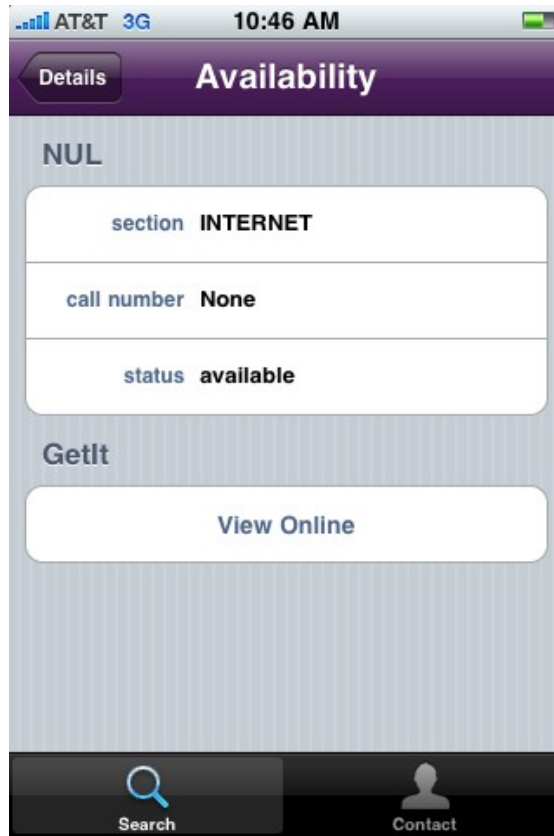
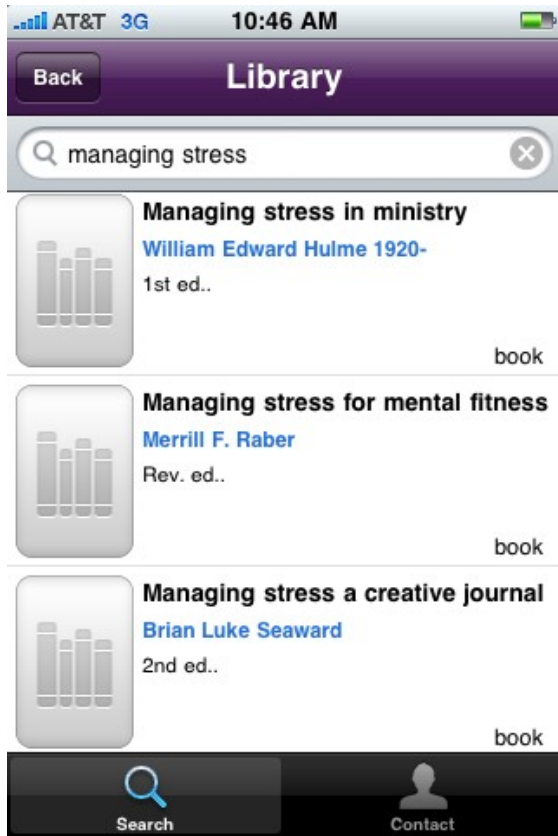
- Videos



Library

Primo Search





Primo and Blackboard

- Integral part of resource discovery strategy
- Collaboration between **Academic & Research Technologies** and the **Library**
 - Blackboard “Pull” from Primo e-Shelf
 - Primo “Push” to Blackboard Content

Area

Blackboard “Pull” from Primo e-Shelf

- Links Primo e-Shelf resources to Blackboard Content Areas
- ***Dynamic display*** of e-Shelf contents in Blackboard

DEMO: *Blackboard PULL from Primo e-Shelf (Beta).mp4*



Push from Primo to Blackboard

- Send a selected resource from search results to Blackboard Content Area
- Send one or more selected items from e-Shelf or basket in Primo to Blackboard Content Area
- Items are not dynamically linked.

DEMO: *Push from Primo into Blackboard content Area
(Beta) mp4*



TOOLS and Resources



Useful Tools for Primo Implementation

- Web Developer Plugin for FireFox
- FireBug (webpage content viewer)
- PriView2 (Record Viewer for Primo)
- IP_Switch (file management across multiple servers)
- WebConfidential (password control)
- Subversion (version management system)
- pUTTY and WinSCP (ssh access and file management programs)
- Jing (screen flow capture program)



Web Developer Plugin for FireFox

The screenshot shows a Mozilla Firefox browser window with the URL `http://ewing.library.northwestern.edu:1701/primo_library/libweb/action/search.do?dscnt=0&fromLog`. The Web Developer plugin is active, displaying the DOM tree on the left. The selected element is `a.selected EXLMainMenuSelected EXLMainMenuSelected EXLMainMenuITEMnucatl(library_catalog)`. The DOM tree shows the following structure:

- Attributes:
 - `class = selected EXLMainMenuSelected EXLMainMenuITEMnucatl(library_catalog)`
 - `href = http://nucatl.library.northwestern.edu/`
 - `title = nucatl (library catalog)`
- Position:
 - Left: 428px Top: 105px
 - Width: 0px Height: 0px
- Other:
 - Font Family: arial,sans-serif
 - Font Size: 12.9867px
- Ancestors:
 - html
 - body
 - table .main EXLSearchLayout
 - tbody
 - tr
 - td
 - div .new_main_menu EXLMainMenu
 - ul
 - li
- Children:
 - None

The browser window displays the Northwestern University Library website. The navigation menu includes links for [NUcat \(library catalog\)](#), [All Databases](#), [e-Journals](#), [Research Guides](#), [Course Reserves](#), and [Help](#). A red arrow points to the [NUcat \(library catalog\)](#) link. The search bar contains the text "GO" and a search button. The page also features a "Hello, Guest" message with links for [Sign in with your NetID for full access](#), [Guest e-Shelf](#), [Why should I sign in?](#), and [My Preferences](#).

NUL Search Tool

HOURS & LOCATION | GET HELP FROM A LIBRARIAN | RENEW | OFF-CAMPUS ACCESS

NORTHWESTERN UNIVERSITY LIBRARY

Today's Main Library hours: 8am - 10pm

Font Family: Arial, Helvetica, sans-serif
Font Size: 14.4px

NUcat (library catalog) All Databases e-Journals Research Guides Course Reserves Help

GO

Search for: anywhere

Children: td .search3 EXLSearchLayout search words, td .eShelf3 EXLEshelfLoginAreaLayout

New Search

Advanced Search

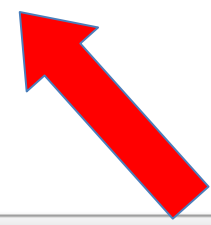
Hello, Guest

[Sign in with your NetID](#) for full access

Guest e-Shelf

? [Why should I sign in?](#) [My Preferences](#)

Welcome to the Library's new search tool for the Library's vast collection of books, journals, videos, sound recordings, journal and newspaper articles, digital images and more



FireBug - Looking at My Library Card link

Primo @ NU Libraries - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://ewing.library.northwestern.edu:1701/primo_library/libweb/action/basket.do?fn=display&fr

Breaking News | Latest... CTA Map - 201 tracker Nagios-NU webpage NU SSL VPN - Restrict... Exlibris - Pivotal eService NU BO PrimoProd

Primo @ NU Libraries

NORTHWESTERN UNIVERSITY LIBRARIES

Back to home page New Search Tags A-Z Journals A-Z Databases Help

e-Shelf - NORTH, MICHAEL (Sign out) What is eShelf ?

My library card This session's queries Saved queries & alerts Basket

Basket E-mail Print Select how to save Go

Type	Author	Title	Added
------	--------	-------	-------

Console HTML CSS Script DOM Net

```
Edit | a < li.unselected < ul < div#fold...Overflow < ul < td#folde...ders_new < tr < tbody < table < td <
  <script src="../../../javascript/jquery/ui.droppable.js" type="text/javascript">
  <style>
  <script>
  <script>
  <ul>
    <div id="folderActions" class="folderActions">
      <div id="foldersOverflow" class="foldersOverf...
        <ul>
          <li class="unselected">
            <a href="myLibCard.do?fn=display&userId=283884&vid=NULV"> My library card </a>
          </li>
          <li class="unselected">
          <li class="unselected">
          <li id="folder77018643" class="selecte...
            <noscript> <table cellpadding="0" cellspacing="6" border="0" class="noJS_form">

```

Style Computed Layout DOM

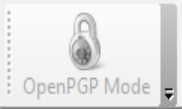
```
.folders_new li a {
  color: #057BB6;
  text-decoration: none;
  vertical-align: middle;
}
.folders_new ul a {
  color: #057BB6;
  text-decoration: none;
}
.folders_new li a {
  color: #057BB6;
  text-decoration: none;
  vertical-align: middle;
}
.folders_new ul a {
  color: #057BB6;
  text-decoration: none;
}
a {
  color: #1770B0;
}
NWU_Primo.css (line 805)
NWU_Primo.css (line 802)
Primo_default.css (line 805)
Primo_default.css (line 802)
NWU_Primo.css (line 13)
```

Done



Address sftp://bradley.library.northwestern.edu/exlibris/primo

UserID primo Connect to URL



My Computer LuisRootSite **CoddRootSite**

Up Folders Cancel Transfer Mode

Change Folder New Folder View Edit Execute file Refresh Rename Delete

Name	Size	Type	Modified	Attributes
cgi-bin		Folder	4/29/2008 4:25 ...	-rwxr-xr-x
dev		Folder	5/5/2010 10:42 ...	-rwxr-xr-x
devices		Folder	11/24/2009 9:2...	-rwxr-xr-x
etc		Folder	5/5/2010 10:42 ...	-rwxr-xr-x
export		Folder	8/16/2009 3:53 ...	-rwxr-xr-x
home		Folder	7/6/2007 3:20 PM	-r-xr-xr-x
kernel		Folder	7/6/2007 3:38 PM	-rwxr-xr-x
lib		Folder	7/6/2007 3:37 PM	-rwxr-xr-x
lost+found		Folder	7/6/2007 3:14 PM	-rwx-----
m1		Folder	8/18/2009 8:53 ...	-rwxr-xr-x
mnt		Folder	7/6/2007 3:15 PM	-rwxr-xr-x
net		Folder	7/6/2007 4:00 PM	-r-xr-xr-x
nul		Folder	4/27/2010 6:54 ...	-rwxr-xr-x
opt		Folder	5/5/2010 10:32 ...	-rwxr-xr-x
oracle		Folder	8/16/2009 4:43 ...	-rwxr-xr-x
platform		Folder	7/6/2007 3:28 PM	-rwxr-xr-x
proc		Folder	5/11/2010 6:49 ...	-r-xr-xr-x
sbin		Folder	7/8/2007 8:05 AM	-rwxr-xr-x



FrazierRootSite EwingPrimoSite ReedRootSite MonroePrimoSite **BradleyPrimoSite**

Up Folders Cancel Transfer Mode

Change Folder New Folder View Edit Execute file Refresh Rename Delete

Name	Size	Type	Modified	Attributes
app		Folder	3/30/2009 9:42 ...	-rwxr-xr-x
backup		Folder	3/30/2009 9:42 ...	-rwxr-xr-x
backup_files		Folder	3/30/2009 9:42 ...	-rwxr-xr-x
ftp_from_exlibris		Folder	5/5/2010 12:15 ...	-rwxrwxrwx
ftp_from_exlibris_old		Folder	3/30/2009 4:27 ...	-rwxrwxrwx
lost+found		Folder	3/3/2009 11:39 ...	-rwx-----
oradata		Folder	5/5/2010 12:01 ...	-rwxr-xr-x
primo		Folder	5/5/2010 7:03 AM	-rwxrwxrwx
primo_indexing		Folder	5/13/2009 2:28 ...	-rwxr-xr-x
primo_publishing		Folder	6/5/2009 7:50 PM	-rwxr-xr-x
product		Folder	5/5/2010 12:12 ...	-rwxrwxr-x
startup		Folder	5/7/2010 2:40 PM	-rwxr-xr-x
tmp		Folder	5/11/2010 6:50 ...	-rwxrwxrwx
ftp.tar.gz	3.56 GB	Win...	5/6/2009 3:34 PM	-r-r--
logsearch.txt	386 KB	TXT ...	2/5/2010 9:43 AM	-r-r--

Information Window

Date	Source	Source Path	Source File Name	Destination	Destination Path	Destination File Name	Size
3/10/2010 7:34:18 PM	FrazierPrimoSite	/exlibris/primo/p2_1/service...	PRIMO-2.1-ServicePack-9.tar.gz_af	ReedPrimoSite	/exlibris/primo/p2_1/service...	PRIMO-2.1-ServicePack...	10,485,760
3/10/2010 7:34:21 PM	FrazierPrimoSite	/exlibris/primo/p2_1/service...	PRIMO-2.1-ServicePack-9.tar.gz_ad	ReedPrimoSite	/exlibris/primo/p2_1/service...	PRIMO-2.1-ServicePack...	10,485,760
3/10/2010 7:34:25 PM	FrazierPrimoSite	/exlibris/primo/p2_1/service...	PRIMO-2.1-ServicePack-9.tar.gz_ak	ReedPrimoSite	/exlibris/primo/p2_1/service...	PRIMO-2.1-ServicePack...	10,485,760

Transfer Manager **Transfer History** Connection Log

Disclaimer (from websie)

PriView v2.0 is provided free of charge to the Ex Libris Primo user community. It is offered without warranty of any kind. Use it at your own risk. Neither Glenn Manino nor Boston College is liable for damages of any kind resulting from the running of this software or using the information it produces.

PriView 2.0 User's Manual

Glenn Manino
Boston College - Library Systems

August 2008

PriView v. 2.0 is a Windows application that helps you view, analyze, and troubleshoot records as they make their way through Ex Libris' Primo® system. Versions 1 and 2 of Primo are supported by PriView v.2.0. It also has tools to inspect, summarize, search, and archive the Normalization Rules that create the PXN records.

Primo combines records from many sources, including your online catalog and digital collections, and provides quick access to them through a single user interface. Primo does this by “normalizing” records from many formats into a single “PNX” (Primo Normalized XML) format, which greatly speeds the search process and provides for a consistent, unified display.

The normalization process uses detailed rules which tell Primo how to convert data from any type of input record into the appropriate fields of the Primo PNX record. But following the process from the MARC or XML input, to the Primo “Source” record format, and finally to the PNX format, can be tedious, involving many open browser windows and much cutting and pasting.

PriView 2.0 can automate many of the steps in this process. With the entry of a single system number, PriView can display the original MARC record from your OPAC, along with the Primo Source record and the final PNX record, in a single window. All three records can be searched simultaneously, revealing the path that data values took through the system. Records can be printed or saved to a file to help document the process or troubleshoot problems.

In the PriView display each PNX field has a link to the normalization rule that created it. The rules can be displayed in the Primo Back Office without having to open a separate browser window. The bulky and sometimes obscure rules can be restated in a much more compact and readable format. An html “archive” of all rules in a rule set can be created and stored for future reference or for global searching.

Primo and the OPAC can be searched from within PriView, and URLs in any record can be opened in a browser. PriView also includes a complete database of all MARC tags and subfields, as well as descriptions of all Primo Validation and Transformation routines used by the normalization rules.



Production
Staging
primo
opac
link
tools
ruleset
print
manual
about

Primo PNX Record [Full View](#) sections

```

<record>
- <control>
  <source recordid>6788</source recordid>
  <sourceid>voyager</sourceid>
  <recordid>voyager6788</recordid>
  <source format>MARC21</source format>
  <source system>Voyager</source system>
</control>

- <display>
  <type>book</type>

```

Primo Source Record [Full View](#) tags

```

<record xmlns="http://www.loc.gov/MARC21/slim">
  <leader>01216cam a2200289 i 4500</leader>
  <controlfield tag="001">6788</controlfield>
  <controlfield tag="005">20060731143344.0</controlfield>
  <controlfield tag="008">760802s1975 ne b 01000 eng d</controlfield>

- <datafield ind2="" ind1="" tag="035">
  <subfield code="9">AAA1236GE</subfield>
</datafield>

- <datafield ind2="" ind1="" tag="040">
  <subfield code="a">IEG</subfield>

```

Voyager MARC Record [Full View](#) System No: 6788 Local Base: tags

Formatting...



voyager #? -d Production Staging

Primo data source System Number

primo opac link tools ruleset print manual about

toolbox Primo PNX Record [Full View](#) sections

```
<record>
- <control>
  <source recordid>6788</source recordid>
  <sourceid>voyager</sourceid>
  <recordid>voyager6788</recordid>
  <sourceformat>MARC21</sourceformat>
  <sourcesystem>Voyager</sourcesystem>
</control>
- <display>
  <type>book</type>
```

record
control
display
links
search
sort
facets
dedup
frbr
delivery
ranking
addata

Primo Source Record [Full View](#) tags

```
<record xmlns="http://www.loc.gov/MARC21/slim">
  <leader>01216cam a2200289 i 4500</leader>
  <controlfield tag="001">6788</controlfield>
  <controlfield tag="005">20060731143344.0</controlfield>
  <controlfield tag="008">760802s1975 ne b 01000 eng d</controlfield>
- <datafield ind2="" ind1="" tag="035">
  <subfield code="9">AAA1236GE</subfield>
</datafield>
- <datafield ind2="" ind1="" tag="040">
  <subfield code="a">IEG</subfield>
```

voyager #? -d

System Number

Production

Staging



primo



opac



link



tools



ruleset



print



manual



about



toolbox

 Primo PNX Record[Full View](#)

sections

<record>

- <control>

<sourcerecordid>6788</sourcerecordid>

<sourceid>voyager</sourceid>

<recordid>voyager6788</recordid>

<sourceformat>MARC21</sourceformat>

<sourcesystem>Voyager</sourcesystem>

</control>

- <display>

<type>book</type>

 Primo Source Record[Full View](#)

tags

<record xmlns="http://www.loc.gov/MARC21/slim">

<leader>01216cam a2200289 i 4500</leader>

<controlfield tag="001">6788</controlfield>

<controlfield tag="005">20060731143344.0</controlfi

<controlfield tag="008">760802s1975 ne b 01000 en

- <datafield ind2="" ind1="" tag="035">

<subfield code="9">AAA1236GE</subfield>

</datafield>

- <datafield ind2="" ind1="" tag="040">

<subfield code="a">IEG</subfield>

record xmlns="http://www.loc.gov/MARC

datafield ind2="" ind1="" tag="035"

datafield ind2="" ind1="" tag="040"

datafield ind2="0" ind1="0" tag="245"

datafield ind2="" ind1="0" tag="260"

datafield ind2="" ind1="" tag="300"

datafield ind2="0" ind1="" tag="440"

datafield ind2="" ind1="" tag="504"

datafield ind2="0" ind1="1" tag="600"

datafield ind2="0" ind1="" tag="650"

datafield ind2="0" ind1="" tag="650"

datafield ind2="0" ind1="1" tag="700"

voyager #? -d Production
Primo data source System Number Staging

primo voyager link tools ruleset print manual about

MARC Tag: LDR Clear

```
<record>  
- <control>  
<source recordid>6788</source recordid>  
<sourceid>voyager</sourceid>  
<recordid>voyager6788</recordid>  
<sourceformat>MARC21</sourceformat>  
<sourcesystem>Voyager</sourcesystem>  
</control>  
- <display>  
<type>book</type>
```

MARC Tag: ldr
LEADER
Character Positions
00-04 - Logical record length
05 - Record status
a - Increase in encoding level
c - Corrected or revised
d - Deleted
n - New
p - Increase in encoding level from prepublication
06 - Type of record
a - Language material
b - Archival and manuscripts control [OBSOLETE]
c - Notated music
d - Manuscript notated music
e - Cartographic material

Primo Normalization Rules on <http://reed.library.northwestern.edu:1601/>

Restate Rule in Rule Set NWU Voyager Archive

NWU Primo Production Back Office

About | Logout | Help

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Pipe Configuration Wizard](#) > [Normalization Rules configuration](#)



Hello Admin

Advanced Normalization Set Editor

Normalization Rules Set: NWU Voyager Section: Display Field: Type

Normalization Rules for field type in PNX Section display in Normalization rules set NWU Voyager

Description: Basic

Enable all rules | Disable all rules

Last Updated By: Admin At: 2010-03-31 15:51:48.0

Version: 4 (modified)

```
<record>
- <control>
<source recordid>6788</source recordid>
<source id>voyager</source id>
<record id>voyager6788</record id>
<source format>MARC21</source format>
<source system>Voyager</source system>
</control>
- <display>
<type>book</type>
```

MARC Tag: ldr

LEADER

Character Positions

- 00-04 - Logical record length
- 05 - Record status
 - a - Increase in encoding level
 - c - Corrected or revised
 - d - Deleted
 - n - New
 - p - Increase in encoding level from prepublication
- 06 - Type of record
 - a - Language material
 - b - Archival and manuscripts control [OBSOLETE]
 - c - Notated music
 - d - Manuscript notated music
 - e - Cartographic material

Primo Normalization Rules on <http://reed.library.northwestern.edu:1601/>

Restate Rule in Rule Set

Rule group

Source Enabled

Conditions logic

Condition 1 - Logic

Condition 1 - Source	Type	Field	Ind1	Ind2	Subfield	Success If
	<input type="text" value="MARC"/>	<input type="text" value="ldr"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Include"/>	<input type="text" value="Match Last"/>

1 Condition 1 - Routines

Routine Parameter

voyager #? -d Production Staging
Primo data source System Number

primo voyager link tools ruleset print manual about

MARC Tag: LDR Clear

- 10 - Indicator count
- 11 - Subfield code count
- 12-16 - Base address of data
- 17 - Encoding level
 - # - Full level
 - 1 - Full level, material not examined
 - 2 - Less-than-full level, material not examined
 - 3 - Abbreviated level
 - 4 - Core level
 - 5 - Partial (preliminary) level
 - 7 - Minimal level
 - 8 - Prepublication level
 - u - Unknown
 - z - Not applicable
- 18 - Descriptive cataloging form
 - # - Non-ISBD

```
<record>  
- <control>  
<sourcerecordid>6788</sourcerecordid>  
<sourceid>voyager</sourceid>  
<recordid>voyager6788</recordid>  
<sourceformat>MARC21</sourceformat>  
<sourcesystem>Voyager</sourcesystem>  
</control>  
- <display>  
<type>book</type>
```

Primo Normalization Rules on http://reed.library.northwestern.edu:1601/

Restate Rule in Rule Set NWU Voyager Archive

Behavior

Action

Go to top of page

Create new source mapping

Create

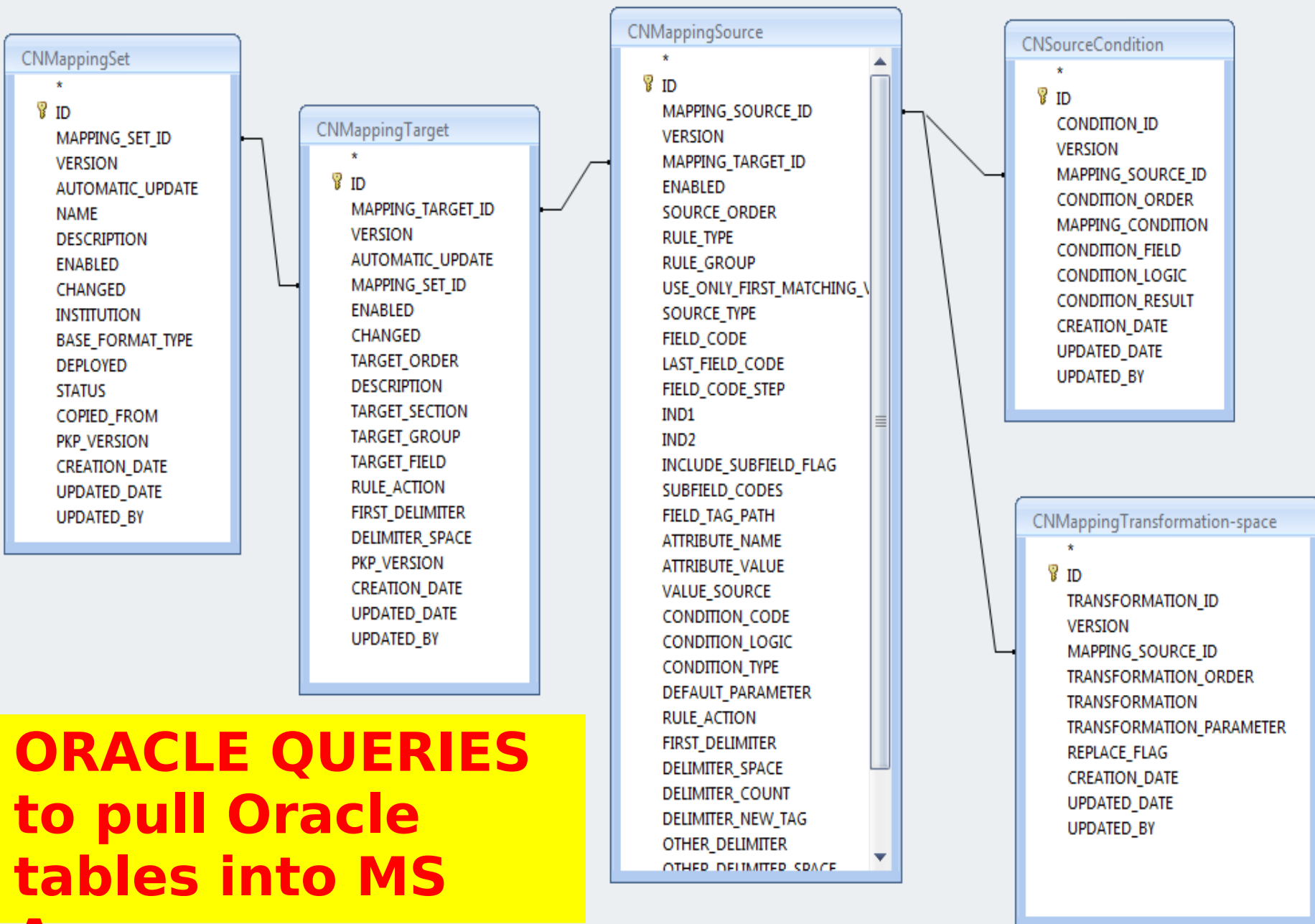
Testing

- MARC xml records
- MARC exchange records

Select a record Test

Edit Record

select all/deselect all rules for testing.



**ORACLE QUERIES
to pull Oracle
tables into MS
Access.**

EL COMMONS - developer community repository

Home - Mozilla Firefox
http://www.exlibrisgroup.org/display/ThePod/Home

Google Ex Libris EL Commons Search

Welcome Northwestern University Library Log o

EL Commons BETA

DigiTool Primo Ex Libris Rosetta

Aleph Voyager Verde SFX MetaLib

Cross Product

Most recent Wiki updates

Watch	Aleph	OPAC 2009	by Michael Edwards (an hour ago)
Watch	Voyager	WebVoyage 7 (Tomcat) Sorting Filters in Search Results	by Jim Robinson (29 Apr)
Watch	SFX	WorldCat Local Source setup	by Alisha (Little) Quagliana (an hour ago)
Watch	MetaLib	Image hover text in Metalib	by Caroline Thorpe (6 hours ago)
Watch	Verde	Harvard documents	by Abigail Bordeaux (08 Apr)
Watch	Primo	iii2primo	by Eric Lease Morgan (07 Apr)
Watch	DigiTool	How Tos	by yoni meidan (18 Sep)
Watch	Rosetta	General	by Hani Iluz (16 Mar)
Watch	Cross Product	NERS Data model	by Lukas Koster (19 Apr)

Developer Zone

Recently Updated Code

- by Mark Watmough (14 Apr)
OPAC spelling suggestions using Yahoo! webservice *JSON* (Aleph)
- by Ere Maijala (08 Apr)
OPAC Enhancer for Aleph (Aleph)
- by Ere Maijala (07 Apr)
MetaLib Automatic Monthly Statistics Gathering Script (MetaLib)
- by Jeffrey Barnett (06 Apr)
Extract data for VuFind (Voyager)

Tags

adaptor advanced aleph api
apishome application basic code
digiTool intermediate javascript marc
metalib nelli-tuning opac parser perl
php primo search sfx sfx-target
users_groups verde voyager
(show all)



ExLibris DocPortal - document

repository

The screenshot shows a Firefox browser window displaying the ExLibris DocPortal. The address bar shows the URL: <http://docs.exlibrisgroup.com/docportal/innerpage.php?dirname=>. The page features the ExLibris logo and the tagline "The bridge to knowledge". On the left side, there is a navigation menu with the following sections:

- ▼ **MetaLib**
 - ▶ [Tree search](#)
 - ▶ [Full-text search](#)
- ▼ **Primo**
 - ▶ [Tree search](#)
 - ▶ [Full-text search](#)
- ▼ **SFX**
 - ▶ [Tree search](#)
 - ▶ [Full-text search](#)
- ▼ **Cross-Product Information**
 - ▶ [Tree search](#)
 - ▶ [Full-text search](#)

Below the navigation menu is a "Log off" link. The main content area displays a tree view of the document repository:

- ▼ Seminars
 - See Cross-Product Information for seminar material
- ▼ Version 1.0
- ▼ Version 2.0
 - ▼ General Information
 - Primo Version 2 Highlights.pdf
 - Primo Version 2.1 Highlights.pdf
 - ▼ Implementation and Installation Information
 - Primo Installation Request Form.doc
 - Primo Service Pack Installation Guide.pdf
 - Primo Upgrade Kit Installation Guide.pdf
 - Requirements for Primo Installation.pdf
 - ▼ Staff User Information
 - Primo Administrator Guide.pdf
 - Primo Interoperability Guide.pdf
 - Primo Online End User Help.pdf
 - Primo Technical Guide.pdf
 - See the EL Commons Web site for API documentation
 - ▼ System Administrator Information
 - Primo System Administration Guide.pdf



NU Communications and Exlibris Response



NU Communications with ExLibris

Feedback Given to ExLibris

Documentation issues.

Communications issues and confusing.

ExLibris Implementation was extremely "responsive."

Feed Back Given to NU

Several months into project, changed methodology in response to our needs. Support focused from Chicago Office. Communication issues resolved.

Meetings between NU and ExLibris to discuss Implementation Issues

ExLibris is again revamping their Implementation Methodology to do more of the up front work so the institution has more to work with.

Given a more complete Primo system to chew on before project starts and training begins. Training is moving to be earlier instead of in the middle of the project



What's Next (continuing) for NU



Development of in-house Documentation

- Document "user" operations
- Use Jing (or similar) to have screen flow
- Document the use Oracle SQL / MS Access apps.



Primo Work "Just around the corner"

- **Primo 3 on production server (staging done)**
- **Primo Central Implementation**
- **bX Implementation into Primo**
- **Staff Testing and Usability Studies**
- **Finally, Institutional "go live"**



Other Work with Primo

Impact

- Voyager 7.2 Upgrade

Needed to take advantage of OPAC via Primo and other features.

- Metalib 4.3.3 Patch

Needed to take advantage of changes in Primo.

- SFX v4 Upgrade

- “Shib-enable” Primo and Blackboard
Shib-Fest this summer at Northwestern



Questions ?

Michael North

m-north@northwestern.edu

Click to edit Master subtitle style



**Thank you
and
Good Bye**



BRIEF SEARCH XService for Primo

<http://frazier.library.northwestern.edu:1701/PrimoWebServices/xservice/search>

Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://frazier.library.northwestern.edu:1701/PrimoWebServices/xservice/s

Most Visited Getting Started Latest Headlines

http://frazier.lib...ight=true&lang=eng

This XML file does not appear to have any style information associated with it. The document tree is shown below.

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Done





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