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

Michael North
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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)

<table>
<thead>
<tr>
<th>Name</th>
<th>ROLES: Proj Mgt</th>
<th>Sys Admin</th>
<th>Data Mngmnt</th>
<th>Front End Mngmnt</th>
<th>Interoperability Mngmnt</th>
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<td>Michael North</td>
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<td>Bridget Canavan</td>
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<td>Dave Bonebrake</td>
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<td>Mark Berendsen</td>
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</table>
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 26Sept2009

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)*

<table>
<thead>
<tr>
<th>Source ID</th>
<th>System and Version</th>
<th>System Type</th>
<th>Format</th>
<th>Est. Nbr. Of Records</th>
<th>Institution Code</th>
<th>Planned STP</th>
</tr>
</thead>
<tbody>
<tr>
<td>NUCat</td>
<td>Voyager version 6.5.1</td>
<td>ILS</td>
<td>MARC</td>
<td>4,500,000</td>
<td>NWU</td>
<td>Priority 1</td>
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<td>MARC</td>
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<td>NWU</td>
<td>Priority 1</td>
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<td>ILS</td>
<td>MARC</td>
<td>135,000</td>
<td>NWU</td>
<td>Priority 1</td>
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<td>MARC</td>
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<td>NWU</td>
<td>Priority 1</td>
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<td>Tran</td>
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<td>MARC</td>
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<td>Priority 1</td>
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<td>(150,000)</td>
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<td>Fedora version 2.0</td>
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<td>Dublin Core</td>
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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 –

*Sequence:* take one piece at a time and experiment with look and feel:
- 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)

### Guidelines:
- **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.
- **Customer configuration:** Each customer has its 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.

### Test Case

<table>
<thead>
<tr>
<th>Sub Topic</th>
<th>Test Case</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Search box</strong></td>
<td>The following checks should be done in every view, local tab/scope (based on customer configuration)</td>
</tr>
<tr>
<td><strong>Search box</strong></td>
<td>Check that search can be limited by resource type (e.g. Journal) and search field (e.g. Title)</td>
</tr>
<tr>
<td><strong>Search box</strong></td>
<td>Check the Advanced Search functionality. Make sure you can limit by publication date, language and material type.</td>
</tr>
<tr>
<td><strong>Search box</strong></td>
<td>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)</td>
</tr>
<tr>
<td><strong>Brief Results</strong></td>
<td>Search for 'shakspere' in any view. See that you get correct Did you mean results.</td>
</tr>
<tr>
<td><strong>Brief Results</strong></td>
<td>Brief results display check. Search 'computers' in every view in the Local Tab/Scope. Make sure all fields exists and displayed correctly.</td>
</tr>
<tr>
<td><strong>Brief Results</strong></td>
<td>Check availability status and location information display.</td>
</tr>
<tr>
<td><strong>Brief Results</strong></td>
<td>Facets display check. Search for 'test' and see that facets are displayed properly. Collection facet check - check that label is 'collection' and collection names are displayed properly. Check also for facets results context.</td>
</tr>
<tr>
<td><strong>Brief Results</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Brief Results</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Brief Results</strong></td>
<td>Check Suggested New Searches option.</td>
</tr>
<tr>
<td><strong>Brief Results</strong></td>
<td>Check the option to Save query and go to the e-shelf to check if it was saved.</td>
</tr>
<tr>
<td><strong>Full Results</strong></td>
<td>Full results display check. Search 'computers' in every view in the Local Tab/Scope. Check that all fields in the full view are</td>
</tr>
</tbody>
</table>
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.
Timeline
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
What We Did
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!)
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</table>

The Good, the Bad, the Ugly

**Documentation**

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

```
NWU Primo Production Back Office

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Data Sources Configuration

> Data Sources

Institution:  ALL

Data Source List

<table>
<thead>
<tr>
<th>Source Name</th>
<th>Source Code</th>
<th>Description</th>
<th>Source System</th>
<th>Source Format</th>
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<td>Data source for ACPDB Voyager database</td>
<td>Voyager</td>
<td>MARC21</td>
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<td>Data source for ARTDB Voyager database</td>
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<td>MARC21</td>
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<tr>
<td>Fedora</td>
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<td>Data Source for Fedora</td>
<td>Other</td>
<td>DC</td>
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<td>Data Source for Hathi Trust repository</td>
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<td>MARC21</td>
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<td>voyager</td>
<td>Data Source for all Voyager databases (nwuVoyager)</td>
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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' data.
- 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:** NWU Voyager  
**PNX Section:** Control

**Normalization Rules Set Attributes**

- **Set Name:** NWU Voyager  
- **Default Source Field Type:** MARC  
- **Version:** 14 (modified)

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

<table>
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<tr>
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<th>Source Field</th>
<th>Action</th>
<th>Updated By</th>
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<td>1</td>
<td>Type Value</td>
<td>Add single PNX field</td>
<td>primo</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Config nmrules/control_sourceid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>control:recordid</td>
<td>1</td>
<td>Type Value</td>
<td>Add single PNX field</td>
<td>primo</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Config nmrules/control_sourceid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>control:originalsourceid</td>
<td>1</td>
<td>Type Value</td>
<td>MERGE- Merge to single PNX field</td>
<td>primo</td>
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<td>Config nmrules/control_originalsourceid</td>
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</tr>
<tr>
<td>control:sourceformat</td>
<td>1</td>
<td>Type Value</td>
<td>Add single PNX field</td>
<td>primo</td>
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<td>Config nmrules/control_sourceformat</td>
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</tr>
<tr>
<td>control:sourcesystem</td>
<td>1</td>
<td>Type Value</td>
<td>Add single PNX field</td>
<td>primo</td>
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<td>Config nmrules/control_sourcesystem</td>
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<table>
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<th><strong>Updated By</strong></th>
<th><strong>Edit</strong></th>
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</tr>
</tbody>
</table>
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

**Rule group** `control_recordid`

<table>
<thead>
<tr>
<th>Type</th>
<th>Configuration XPath</th>
<th>Enabled</th>
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<tr>
<td>Config</td>
<td><code>nmrules/control_sourceid</code></td>
<td>✔</td>
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**Conditions**  No conditions Specified

**Transformations**

<table>
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<th>Transformation</th>
<th>Parameter</th>
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</thead>
<tbody>
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<td>Copy As Is</td>
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</tbody>
</table>
MS Access "Design View" of Oracle Normalization Tables imported from Primo server.
Normalization Rules Report (pulled from MS Access tables) written in VB by Gary Strawn - NU

Landscape • 100 pages!
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
**Search**

* Search for: einstein

Search which fields? anywhere in the record

Phrase or Keywords? contain my query words

Records per page: 10

**Books, Journals and More (1044)**

Total Hits: 1044 -- Displaying: 1 to 10

1. **Einstein** (book)

   **Author/Created**: Jeremy Bernstein 1929-
   New York, Viking Press, 1973
   **Availability**: available

   Show/Hide Details
<table>
<thead>
<tr>
<th>Number</th>
<th>Title</th>
<th>Author/Creator</th>
<th>Availability</th>
<th>Subject</th>
<th>Online Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Fred Jerome, author, &quot;The Einstein file&quot; (video)</td>
<td>West Lafayette, IN : C-SPAN Archives, c2002</td>
<td>available</td>
<td>Relativity (Physics) (140)</td>
<td>available (998)</td>
</tr>
<tr>
<td>5</td>
<td>Einstein journal of biology and medicine (Online)</td>
<td>Bronx, NY : Albert Einstein College of Medicine, c2003-</td>
<td>available</td>
<td>Physics (97)</td>
<td>online_resources (182)</td>
</tr>
</tbody>
</table>
Primo will be added to this page when development complete.
Northwestern Mobile

mobile.northwestern.edu
Northwestern Mobile Apps

- News
- Events
- Maps
- Online Directory
- Library
- Images
- Videos
- Athletics
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

• Library presence in Blackboard
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)
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
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.

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.

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.
Itinerarium italicum: the profile of the Italian Renaissance in the mirror of its European transformations...
Primo Normalization Rules on http://reed.library.northwestern.edu:1601/

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:

Enable all rules | Disable all rules

Last Updated By:    At: 2010-03-31
Admin

Version: 4 (modified)
ORACLE QUERIES to pull Oracle tables into MS Access.
EL COMMONS - developer community repository
NU Communication 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/brief?institution=NWU&onCampus=false&query=any,contains,einstein&indx=1&bulkSize=5&dym=true&highlight=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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    <sear:RESULT>
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          <sear:FACET_VALUES VALUE="1" KEY="Brooks, A"/>
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