

Staff vs. Public data (views) in Primo

How we have used Primo to protect our confidential data, and share our public data

THE CHURCH OF
JESUS CHRIST
OF LATTER-DAY SAINTS

Agenda (staff vs. public data)

Background

- The Problem
- The Solution (Overview and Demo)
- The Solution (Details)
- Additional Material

Background LDS Church

- 14+ million members globally
- 166 languages supported
- \$885 MM of humanitarian assistance given since 1985
- 4 Universities and Colleges
- Family History Library
- Church History Library
- Audio Visual Department / Motion Picture Studio

Background Church History Dept

- Within The Church of Jesus Christ of Latter-day Saints there is a Church History Department.
- Inside this department there is a Church History Library, Museum, and Archives.
 - Aleph handles circulation for all 3 organizations.
- Primo is used for search and discovery.

3 Categories of Confidential Data

- Most of our records are public (no confidential data).
- Some records are completely confidential (Staff only).
- Some public records contain fields that are confidential.

Agenda (staff vs. public data)

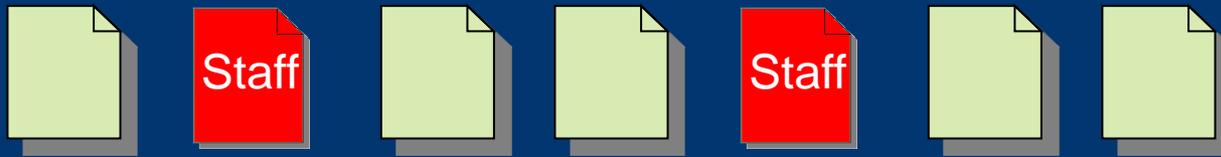
- Background

The Problem

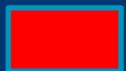
- The Solution (Overview and Demo)
- The Solution (Details)
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The Problem

- How to configure Primo to:
 - Share confidential records only with Staff



- Share records with the Public but suppress confidential tags (only staff can see these)



Red data is not available to the Public

The Problem, cont.

- Other concerns:
 - Some locations are only relevant to staff.
 - Real-Time Availability for Public search results for should favor the Open Stacks, while Staff searches should favor the search context.



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Staff and Public Data (views)

OVERVIEW AND DEMO

The Solution (Overview)

- We worked with Ex Libris to come up with a solution that uses native Primo functionality.
 - We are using Primo 3.1.
- The basic concept is to create 2 sets of everything.
 - One for Staff and one for the Public.
 - 2 institutions, 2 views, 2 data sets, 2 pipes, etc.
- We are now in Production with this solution.

Demo

- Public View
- Staff View

Why 2 Sets of Everything?

- What we found with a view-only approach to security:
 - There is no way to prevent the public from accessing Staff view.
 - There is no way to prevent the public from accessing the PNX records.
- Conclusion:
 - Separate our data into 2 sets (Staff and Public).
 - Create 2 experiences:
 - One for Staff
 - One for Public
- What follows is the “how to”.

Sub-Agenda

- The Solution (Details)



- Create two institutions (with separate libraries)
- Create two data sources and two pipes
- Create two sets of normalization rules
- Create two views with search scopes
- Additional configuration

Staff and Public Institutions

CREATE TWO INSTITUTIONS

Create Two Institutions

- Create two institutions to facilitate two different user experiences: Staff and Public.
 - Real-Time Availability
 - Authentication
 - Views
- Create the Staff Institution and Library Codes and then duplicate and modify for the Public Institution.
- Public Institution (nearly identical):
 - No Source ILS Library codes in the Public
 - No ILS Delivery Base URL

Edit Institution

Institution: PCHD: Public CHD & MSD

General Institution Attributes for:

Institution Code:	PCHD
MetaLib Institution Code:	<input type="text"/>
MetaLib User Name:	<input type="text"/>
SFX Institute:	<input type="text"/>
Source ILS institution Codes:	<input type="text"/>
PDS Configuration	<input type="text"/>
Description:	Public - Church History L

Delivery Base URLs:

MetaLib	<input type="text"/>
SFX	<input type="text"/>
ILS	<input type="text"/>
Digital Repository	http://contentdm.lib.byu.edu/u?/
Digital Repository 2	<input type="text"/>
Digital Repository 3	<input type="text"/>
RTA	http://alephdev.ldschurch.org:8991
API	http://alephdev.ldschurch.org:1891

Public Institution

- In order to manage Real-Time Availability separately for the Public View, we created a special set of Public library codes. (See normalization rules and Real-Time Availability sections for “how-to” details).
 - Our goal was to have 3 types of requests a Public patron can make:
 - Go directly to the Open Stacks and get the material.
 - Place a hold request at the Reference Desk (and receive the material in the reading room in a few minutes).
 - Make a special request at the Reference Desk (and come back when the material is available).

Libraries		
Primo Library Code	Source ILS Library codes	Primo Library Name
OPEN		Open Stacks
REFDESK		Reference Desk
SPECIAL		Reference Desk (Spe

Sub-Agenda

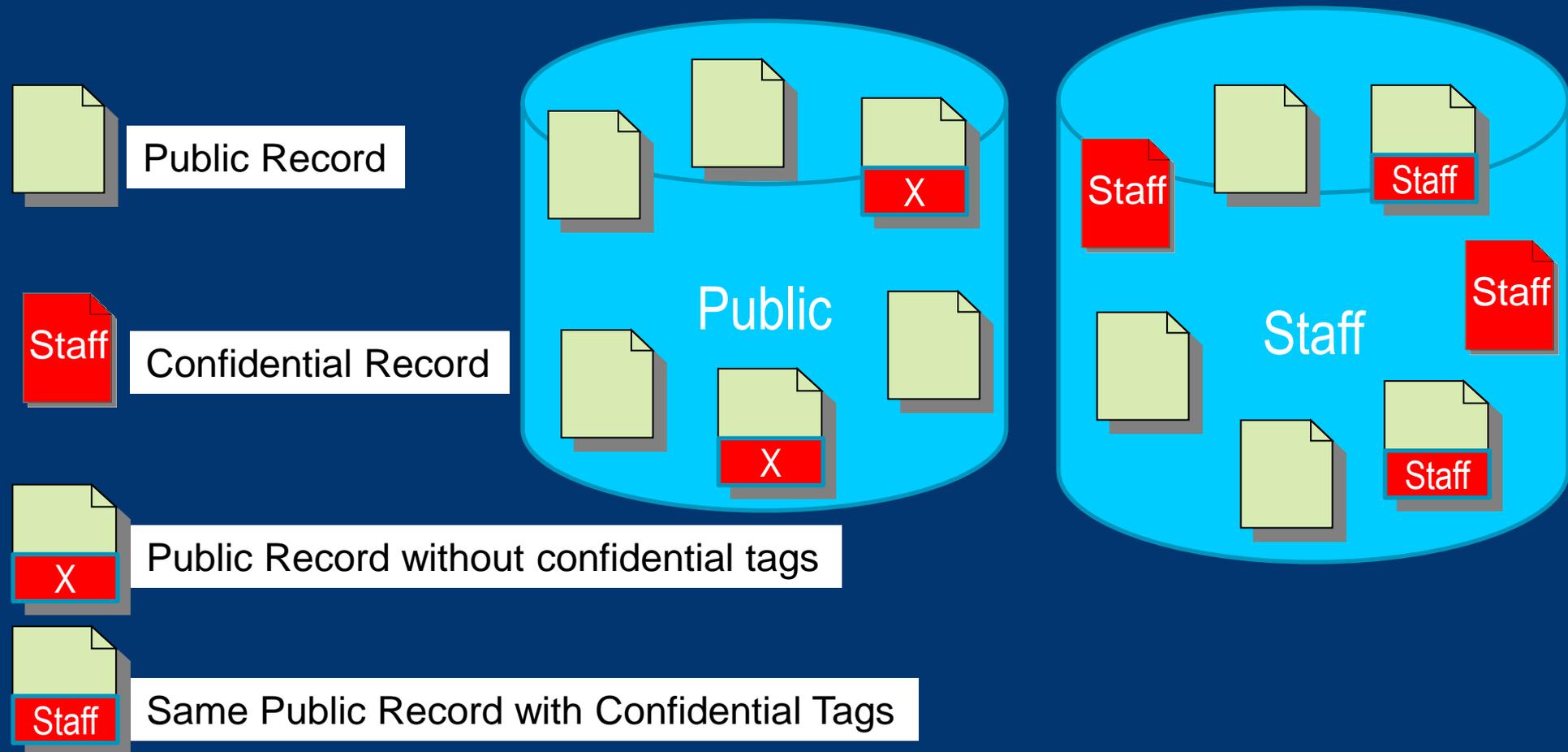
- The Solution (Details)
 - Create two institutions (with separate libraries)
 -  • Create two data sources and two pipes
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Staff and Public Data Sets

CREATE DATA SOURCES AND PIPES

Overview

- In order to Harvest 2 sets of data in Primo, we configured our Source ILS to publish 2 sets of data.



Harvest Two Sets of Data

- In Aleph, we created 2 logical bases to separate our data into Staff and Public data.
 - Staff (all records, all tags)
 - Public (non-confidential records, non-confidential tags)
- In Primo, we created 2 data sources, 2 scope values, 2 normalization rules, and 2 pipes

Publish 2 Sets of Data

- We use the STA tag in our Aleph data. Records that have STA=FINAL are available for the public. We created 2 logical bases as follows:

- /opt/exlibris/aleph/u20_1/alephe/tab/tab_base.eng
- PUBLIC_BASE_NAME Public Records XYZ01 Y wst=FINAL...
- STAFF_BASE_NAME Staff Records XYZ01 Y alldocuments...

- Add the logical bases to the Aleph publishing mechanism

- /opt/exlibris/aleph/u20_1/xyz01/tab/tab_publish
- STAFF STAFF_BASE_NAME N STAFF MARC_XML
- PUBLIC PUBLIC_BASE_NAME N PBLIC MARC_XML

- Modify expand routines

- /opt/exlibris/aleph/u20_1/xyz01/tab/tab_expand
- STAFF expand_doc_bib_avail THRESHOLD=500
- STAFF expand_doc_bib_accref_1 THRESHOLD=500
- STAFF expand_doc_bib_hol THRESHOLD=500,SUP-HOL=Y,5#####,856##, etc.
- PBLIC expand_doc_bib_avail THRESHOLD=500
- PBLIC expand_doc_bib_accref_1 THRESHOLD=500
- PBLIC expand_doc_bib_hol THRESHOLD=500,866##,900##,930##

Create Two Data Sources

- In Primo, we created 2 data sources (Staff and Public)
 - In the data source (Ongoing Config > Pipe Configuration > Data Source):
 - The Public data source (name, code, desc) is connected to the Public Institution (the Staff data source connects to the Staff Institution).
 - The Original Source Code (and everything else) is the same for Staff and Public – since it points to the same XYZ01 Bib Library.

> **Data Sources**

Data Source Attributes for ALEPH-PCHD

Source Description	Source name: <input type="text" value="ALEPH-PCHD"/>	Source code: ALEPH-PCHD	Source format: <input type="text" value="MARC21"/>
	Description: <input type="text" value="CHD Public"/>		Original Source Code <input type="text" value="XYZ01"/>
Source Definition	Institution: <input type="text" value="PCHD: Public CHD & MSD"/>	Source system: <input type="text" value="Aleph"/>	Version <input type="text"/>
	File Splitter: <input type="text" value="OAI splitter"/>	Character Set: <input type="text" value="UTF-8"/>	Input Record Path <input type="text" value="record"/>
			XREF keys <input type="text"/>

Create Two Sets of Scope Values

- Create Public and Staff Scope Values
 - Scope Values affect multiple functions in Primo: scope limitation in views, normalization rules and real-time availability.
 - We created separate Scope Values (for the Staff and Public data sets) so that we can have separate searches for Staff and Public.
 - For Staff View: create at least 1 Restricted Search Values to put on every Staff record (from the Staff data set).

Scope Values List

Code	Name	Description	Type	Search	Restricted Search
CHD	CHD: All of CHD & MSD Scope	CHD: All of CHD & MSD Scope ...	institution	<input checked="" type="checkbox"/>	
PCHD	PCHD: Public CHD & MSD Scope	PCHD: Public CHD & MSD Sco...	institution	<input checked="" type="checkbox"/>	
OPEN	OPEN: Open Stacks Scope (pu...		library	<input checked="" type="checkbox"/>	
OSTKS	OSTKS: Open Stacks Scope		library	<input checked="" type="checkbox"/>	
LIBRARY	LIBRARY: Owned Records Scope		collection	<input checked="" type="checkbox"/>	
PARCHIVES	PARCHIVES: Owned Records (...)		collection	<input checked="" type="checkbox"/>	
PLIBRARY	PLIBRARY: Owned Records (pu...		collection	<input checked="" type="checkbox"/>	
ARCHIVES	ARCHIVES: Owned Records Sc...		collection	<input checked="" type="checkbox"/>	
REFDESK	REFDESK: Reference Desk (pu...		library	<input checked="" type="checkbox"/>	
MSD	MSD: Owned Records Scope		collection	<input checked="" type="checkbox"/>	
CHD_STAFF_RESTRICTED	CHD_STAFF_RESTRICTED: C...		other		<input checked="" type="checkbox"/>

Create Two Pipes

- Ongoing Config > Pipe Config > Pipe Config Wizard:
 - Create Public and Staff Pipes

- The Public Pipe is connected to the Public Data Source and the Public Normalization Rules, and the Public Source directory **.

- The Enrichment Set (and everything else) is the same.

> Define Pipe

Pipe Name: ALEPH_PCHD Pipe Type: Regular

Pipe Description: Aleph CHD Public Pipe

Source	Normalization and Enrichment	Errors
Data Source: * ALEPH-PCHD	Normalization Mapping Set: * ALEPH-PCHD	Priority: * Medium
Harvesting method: Copy	Enrichment Set: * Aleph Marc	Maximum error threshold 5 % (1-100)
Source directory: * /opt/exlibris/primos_im <input type="checkbox"/> Delete after copy Start harvesting files/records from: * Aug 17, 2011	Harvested File Format: * .tar.gz	
	Custom Last Stage: *	

** This is dependent upon your harvest method.

Sub-Agenda

- The Solution (Details)
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Staff and Public Normalization Rules

CREATE NORMALIZATION RULES

Normalization Overview

- Use the Normalization Rules to map Public Data to the Public Institution, and Staff Data to the Staff Institution.
- This is the map for Aleph AVA tag (PNX Section: Display, Field: Library Level Availability).

Primo Normalization Rule

Field Name	Description
availlibrary	<p>The library-level availability status, which includes availability information per Primo library or sub-location, in addition to location information. The field is structured with subfields as follows:</p> <ul style="list-style-type: none"> ■ \$\$I—institution code ■ \$\$L—library code ■ \$\$1—sub-location ■ \$\$2—call number ■ \$\$S—availability status (available, unavailable, check_holdings) ■ \$\$3—number of items ■ \$\$4—number of unavailable items ■ \$\$5—multi-volume flag: Y/N ■ \$\$6—number of loans (for ranking purposes)

Aleph AVA Tag

AVA	Library Availability	Notes
a	ADM code	Institution Code
b	Sublibrary code	Library Code
c	Collection (first found)	Collection Code
d	Call number (first found)	
e	Availability status	If it is on loan (it has a Z36). If it is on hold shelf (it has Z37=S). If it has a processing status.
f	Number of items (for entire sublibrary)	
g	Number of unavailable loans	
h	Multi-volume flag (Y/N)	If first Z30-ENUMERATION-A is not blank or 0, then the flag=Y, otherwise the flag=N.
i	Number of loans (for ranking/sorting)	
j	Collection code	

Normalization Rules Mapping

- Create the normalization rules for the Staff Institution, then duplicate them and modify them to create the Public normalization rules.
- The main thing that must be in the Staff rule set (and not in the Public rule set) is the following:
 - PNX > Search > Restricted Search Scope

> **Normalization Set Editor**

Normalization Rules Set: Section: Field:

Normalization Rules for field ressearscope in PNX Section search in Normalization rules set ALEPH-CHD

1

Type	Value
<input type="text" value="Constant"/>	<input type="text" value="CHD_STAFF_RESTRICTED"/>

Transformation	Parameter
<input type="text" value="Copy As Is"/>	<input type="text"/> <input type="button" value="+"/>

Public Normalization Rules

- What follows are the changes to the Public Normalization rules.
- Mapping areas to be changed:
 - Delivery & Scoping
 - Display
 - Search

Delivery & Scoping > Institution

- This will map the Aleph ADM library to the Public Institution using the “ILS Institution Codes” mapping table.
- We used a very simple approach to Institution Codes. E.g.
- Staff Institution: CHD
- Public Institution: PCHD

> Normalization Set Editor

Normalization Rules Set: Section: Field:

Normalization Rules for field institution in PNX Section delivery in Normalization rules set ALEPH-PCHD

Description: Advanced

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

Last Updated By: becklocey At: 2011-08-17 16:22:32.0

Comments:

Version: 15 (modified)

[Go to bottom of page](#)

Type	Field	Ind1	Ind2	Subfield
<input type="text" value="MARC"/>	<input type="text" value="AVA"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Include a"/>

1 Transformation Parameter

<input type="text" value="Use mapping table"/>	<input type="text" value="ILS Institution C"/> +
<input type="text" value="Add to beginning of string"/>	<input type="text" value="P"/> + -

Display > Library Level Availability (\$\$I – Institution)

- For the Public normalization rules:
 - Section: Display, Field: Library Level Availability
 - This is the “Institution” part (\$\$I) of this PNX tag
 - Use mapping table: ILS Institution Code
 - Add a “P” in front of the \$\$I field.
 - See next slide for example.

Title: On the road with
Joseph Smith: an
author's diary, by Richard
Lyman Bushman

```
<availlibrary>  
  $$IPCHD$$LREFDESK$$1Res-Book$$2 (M270.1 B9789o 2007 )$$Scheck_holdings$$31$$40$$5N$$60  
</availlibrary>  
<availinstitution>$$IPCHD$$Scheck_holdings</availinstitution>  
<availpnx>available</availpnx>
```

Display > Library Level Availability (\$\$I - Institution)

Rule group display_availlibrary

Type Field Ind1 Ind2 Subfield

Source MARC AVA Include a Enabled

Conditions logic Conditions relation

Conditions + False Or

Condition 1 - Logic True

Condition 1 - Source Type Field Ind1 Ind2 Subfield Success If

MARC AVA Include b Match Current + -

Condition 1 - Routines +

General Parameter

Routine Check string equals string Parameter MLIB + -

Condition 2 - Logic True

Condition 2 - Source Type Field Ind1 Ind2 Subfield Success If

MARC AVA Include b Match Current + -

Condition 2 - Routines +

General Parameter

Routine Check string equals string Parameter PROJ + -

Transformations +

Transformation	Parameter
Use mapping table	ILS Institution C + -
Add to beginning of string	\$\$IP + -

Behavior

Action ADD

1

Test

Display > Library Level Availability (\$\$L – Library)

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- For the Public normalization rules:
 - Section: Display, Field: Library Level Availability
 - This is the “Library” part (\$\$L) of this PNX tag
 - Map the AVA \$\$b to the custom library category
 - See next slide for example.

Title: On the road with
Joseph Smith: an
author's diary, by Richard
Lyman Bushman

```
▼<availlibrary>  
  $$IPCHD$$LREFDESK$$1Res-Book$$2 (M270.1 B9789o 2007 )$$Scheck_holdings$$31$$40$$5N$$60  
</availlibrary>  
<availinstitution>$$IPCHD$$Scheck_holdings</availinstitution>  
<availpnx>available</availpnx>
```

Display > Library Level Availability (\$\$L - Library)

3 Condition 3 - Logic

Condition 3 - Source Type Field Ind1 Ind2 Subfield Success If

Condition 3 - Routines General Parameter Routine Parameter

Condition 4 - Logic

Condition 4 - Source Type Field Ind1 Ind2 Subfield Success If

Condition 4 - Routines General Parameter Routine Parameter

Transformations

Transformation Parameter

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

Action

Search > Search Scope

- This will map the Public data sets for the Library, Museum and Archives libraries to the appropriate Scope Value Code.

Rule group search_searchscope

Type **Field** **Ind1** **Ind2** **Subfield**

Source MARC Include Enabled

Conditions + No conditions Specified

2 **Transformations** +

Transformation	Parameter		
Copy As Is	<input type="text"/>	+	-
Add to beginning of string	P	+	-

Behavior

Action ADD

Scope Values List

Code	Name	Description	Type	Search	Restricted Search
CHD	CHD: All of CHD & MSD Scope	CHD: All of CHD & MSD Scope ...	institution	<input checked="" type="checkbox"/>	
PCHD	PCHD: Public CHD & MSD Scope	PCHD: Public CHD & MSD Sco...	institution	<input checked="" type="checkbox"/>	
OPEN	OPEN: Open Stacks Scope (pu...		library	<input checked="" type="checkbox"/>	
OSTKS	OSTKS: Open Stacks Scope		library	<input checked="" type="checkbox"/>	
LIBRARY	LIBRARY: Owned Records Scope		collection	<input checked="" type="checkbox"/>	
PARCHIVES	PARCHIVES: Owned Records (...)		collection	<input checked="" type="checkbox"/>	
PLIBRARY	PLIBRARY: Owned Records (pu...		collection	<input checked="" type="checkbox"/>	



Search > Search Scope

- This will map the Aleph sub-library to the custom library buckets.
- This is to “prefer” a certain library location in Real-Time Availability.

Rule group search_searchscope

Type Value Enabled

Conditions logic Conditions relation

Condition 1 - Logic

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

Condition 1 - Routines

General Parameter

Routine

Parameter

Condition 6 - Logic

Condition 6 - Source	Type	Field	Ind1	Ind2	Subfield	Success If
	<input type="text" value="MARC"/>	<input type="text" value="AVA"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Include"/>	<input type="text" value="b"/>

Condition 6 - Routines

General Parameter

Routine

Parameter

Transformations

Transformation	Parameter
<input type="text" value="Copy As Is"/>	<input type="text"/>

Behavior

Sanitize PNX Tags

- For the Public normalization rules:
 - Disable any other PNX tags that you don't want associated with the Public data set.
 - Note: we attempted to ensure that our Public data set didn't include any confidential tags, this step was a precaution – just in case we missed something.

Sub-Agenda

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Staff and Public View

CREATE TWO VIEWS

Create Two Views

- From Primo's help:
 - Each institution can have its own fully customized views. Views can be defined for individual institutions within a consortium or for all institutions within a consortium. However, each view must have a default institution, which is used for end-user authentication.
 - By attaching the Staff view to the Staff institution, you can leverage Primo's user group functionality for authentication. E.g. the Public user cannot access the restricted data.

Staff vs. Public View

- Create the Staff view first, then duplicate it and modify it for the Public view.
 - Connect the Staff View to the Staff Institution.
- The following slides walk you through the View Wizard for the Public View.

Public View, View Attributes

- Create the Staff view first, then duplicate it and modify it for the Public view.
 - Connect the Public View to the Public Institution.

The screenshot shows the 'Edit View Attributes' page for 'CHD Public View'. The 'View' dropdown is set to 'CHD Public View'. The 'General View Attributes of CHD Public View View:' section includes the following fields:

General Attributes	
View Name:*	CHD Public View (Give the view a meaningful identification, for example the
Code :*	CHD_PUBLIC
Is Template	<input type="radio"/> Yes <input checked="" type="radio"/> No
Description:	CHD Public View
Institution :*	PCHD: Public CHD & MSD
Copied From:	Inherits: <input type="radio"/> Yes <input checked="" type="radio"/> No

A blue arrow points from the text 'Connect the Public View to the Public Institution.' to the 'Institution :*' dropdown menu.

Public View (example)

- When creating Search Scopes, use the Public Scope Values defined earlier.
- We created a set of Search Scopes to match the Church History Department.

The screenshot displays the Church History Catalog website. At the top left is the Church logo, and at the top right is a 'Sign in' button. A navigation bar contains 'Home', 'General Information', and 'Resources and Tools'. A search bar is located on the right side of the navigation bar. Below the navigation bar is a search area with the text 'Search the library catalog and other resources'. A search input field is present, with a dropdown menu open showing 'Church History Department' selected. Below the input field are filters for 'All Material Types' and 'that contain my query words'. A 'Search' button and a link to 'Advanced Search' are also visible. At the bottom of the page, there are links for 'New Church History Catalog', 'Digital Collections', and 'Guides', along with 'Library Location and Hours' and a phone number.

THE CHURCH OF JESUS CHRIST OF LATTER-DAY SAINTS | CHURCH HISTORY CATALOG

Home | General Information | Resources and Tools | Search

Search the library catalog and other resources

Church History Department

- Library records
- Museum records
- Archive records
- Digital Collections
- Church History Digital
- BYU Provo ContentDM
- All records

New Church History Catalog | Digital Collections | Guides | Library Location and Hours

Phone 801-240-2272

Public View, Library Search Scope

- We attached Library records (Scope Value: PLIBRARY) to the Search Scope of the same name: PLIBRARY.
- Note: the Search Scope name can be different from the Scope Value.

Scope: Interface Language:

General Attributes for Search Scope PLIBRARY

Scope Name :

General:

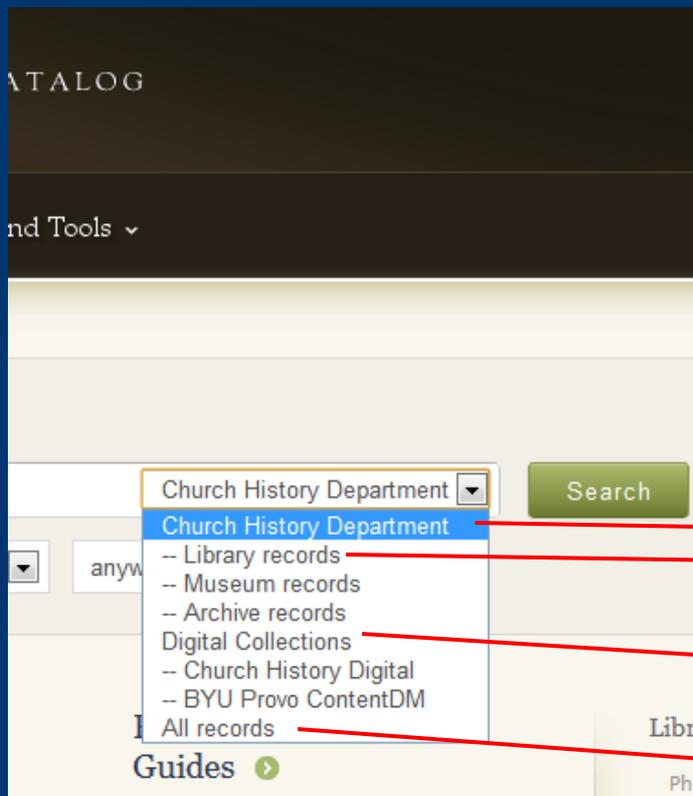
Display Text:

Search Scope Values

	Type	Name
<input type="checkbox"/>	institution	CHD: All of CHD & MSD Scope
<input type="checkbox"/>	institution	PCHD: Public CHD & MSD Scope
<input type="checkbox"/>	library	OPEN: Open Stacks Scope (public)
<input type="checkbox"/>	library	OSTKS: Open Stacks Scope
<input type="checkbox"/>	collection	LIBRARY: Owned Records Scope
<input type="checkbox"/>	collection	PARCHIVES: Owned Records (public)
<input checked="" type="checkbox"/>	collection	PLIBRARY: Owned Records (public)

Public View, Default Tab

- Add the Search Scopes to the default tab.



Edit View Attributes

View : CHD_PUBLIC Interface Language: English

General Attributes of default_tab Tab

Tab Name:
Description:
ToolTip:
Display Find In Database:

Scopes for default_tab Tab

No.	scope Name
1	PCHD
2	PLIBRARY
3	PMUSEUM
4	PARCHIVES
5	DIGITAL
6	DCMS-CHD
7	BYUP-CONTENTDM
8	PALL

Public View, Tiles

- Add the public facing fields (non-confidential tags) to the Full Results.
 - These fields are in the Public data set.
- Add the public facing links.

Links to display in full results

Field
Link to Resource
Additional Link
Link to Union Catalog
GBS full
Link to Finding Aid

Primo Home > Ongoing Configuration Wizards > Views Wizard

> **Edit Full Details Attributes**

View : CHD_PUBLIC Tile : Full Results

Field to display in the full results

Field
Vernacular Title
Title
Uniform Title
Edition
Creator ; Contributor
Publisher
Description
Subject
Language
Is Part Of
Format
Access Note
Bibliography Note
Call Number
Access Number
Coverage
User Review
User Rank
Versions
Host Title
Pub Info
Vol./No.

Public View, Search Example

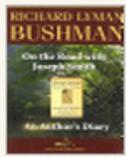
- Search on “rough stone” in Library Search Scope

BETA

Search the library catalog and other resources

rough stone -- Library records Search Advanced Search

Books that contain my query words anywhere in the record



On the road with Joseph Smith: an author's diary, by Richard Lyman Bushman

Richard Lyman Bushman 1931-

Call Number **M270.1 B9789o 2007**
Request from Reference Desk **Res-Book** (M270.1 B9789o 2007)

 Add to e-shelf

Brief DETAILS LOCATIONS

On the road with Joseph Smith: an author's diary,

Richard Lyman Bushman 1931-

Call Number **M270.1 B9789o 2007**
Request from Reference Desk **Res-Book** (M270.1 B9789o 2007)

DETAILS LOCATIONS

Title: On the road with Joseph Smith: an author's diary, by Richard Lyman Bushman
Author/Creator: Richard Lyman Bushman 1931-
Publisher: Salt Lake City, [Utah] Greg Kofford Books c2007
Description: Summary: Richard Bushman's memoir written during his travels across the country delivering lectures on his book **Rough Stone** Rolling.
Subjects: Smith, Joseph 1805-1844, ; Bushman, Richard Lyman 1931- ; Authors -- Diaries ; Journals
Language: English
Format: 141 p. 21 cm..
Access Note: Paperback.
Includes index.
Call Number: M270.1 B9789o 2007

```
<searchscope>ALEPH-PCHD</searchscope>  
<searchscope>PLIBRARY</searchscope>  
<searchscope>REFDESK</searchscope>  
<scope>ALEPH-PCHD</scope>
```

PNX

Full

Sub-Agenda

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Staff and Public Configuration

ADDITIONAL CONFIGURATION

Configure `tab_service.<institute>`

- This defines the linkage between Primo and Aleph for the institution in your ILS. We used the department acronym for the Staff institute. E.g. MSD, FHD, CHD, etc.
 - Note: you do not need to create one for the Public institution.
- On the fe server(s):
 - `$ pdsroot`
 - `$ cd conf_table (/opt/exlibris/primo/p3_1/pds/conf_table)`
 - Edit `tab_service.lower_case_institute_code`:
 - `[INSTITUTE_DISPLAY]`
 - `code = UPPER_CASE_INSTITUTE_CODE **`
 - `lang = ENG`
 - `desc = XYZ50 – Description`
 - ** note: this is the Primo Institution code that maps to the ILS Institution Code.
 - Home > Advanced Configuration > All Mapping Tables. Sub System: Normalization
 - Edit: ILS Institution Codes

Configure <INSTITUTE>.tags

- This defines how users are mapped from the source ILS system to the Staff user group and institution in Primo. Note: create these groups in Primo in the next step. Also, you do not need to create one for the Public user groups.
 - On the fe server(s)
 - \$ pdsroot
 - \$ cd conf_table (/opt/exlibris/primo/p3_1/pds/conf_table)
 - Edit / Create UPPER_CASE_INSTITUTE_CODE.tags file
 - [ATTRIBUTES_VALUES_MAPPING]
 - z305-bor-status,10 = group, STAFF_GROUP_CODE1
 - z305-bor-status,20 = group, STAFF_GROUP_CODE1
 - z305-bor-status,25 = group, STAFF_GROUP_CODE2
 - z305-bor-status,10 = institute, INSTITUTE_CODE
 - z305-bor-status,20 = institute, INSTITUTE_CODE
 - z305-bor-status,25 = institute, INSTITUTE_CODE
 - [END]



Configure User Groups

- Home > Ongoing Configuration Wizards > Configure User Groups

DEV Primo Back Office

[Primo Home](#) > [Initial Configuration Wizards](#) > [Primo Configuration Wizard](#) > [Step 2: Authentication Configuration Wizard](#) > **Configure User Groups**

> **Code Tables**

Sub System : BO Table Name : User Group Deploy

Code Table Rows

Enabled	Code ▲ ▼	Description ▲ ▼	Language ▲ ▼	Display Order	Default Value	Last Up
<input type="checkbox"/>			All ▼			
<input checked="" type="checkbox"/>	notguest	Not Guest	en_US	1	<input type="checkbox"/>	06/30/10
<input checked="" type="checkbox"/>	ALL	ALL	en_US	0	<input type="checkbox"/>	06/30/10
<input checked="" type="checkbox"/>	STAFF_GROUP_CODE1	Dept 1 Staff User	en_US	2	<input type="checkbox"/>	07/07/11
<input checked="" type="checkbox"/>	STAFF_GROUP_CODE2	Dept 2 Staff User	en_US	4	<input type="checkbox"/>	07/07/11

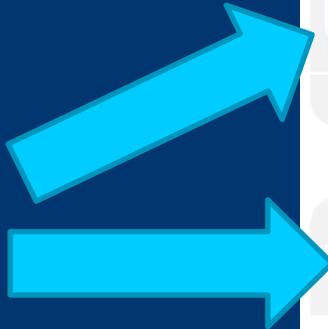
Table Description:

Create a New Code Table Row

Code	Description	Language	Display Order
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>

Cancel & Go back

Step 2: Authentication Configuration Wizard



Connect the Search Restriction to the User Group

- Primo Home > Ongoing Configuration Wizards > Restrictions and Delivery Configuration Wizard > Define Restrictions for Search Scopes

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Restrictions and Delivery Configuration Wizard](#) > [Define Restrictions for Search Scopes](#)

> Search Restrictions

Search Restrictions

Scope Name	Description	Institution	On/Off Campus	User Group	Enabled
CHD_STAFF_RESTRICTED: CHD Staff Restricted Scope		All	Anywhere	CHD Staff User	<input checked="" type="checkbox"/>

Scope Values List

Code	Name	Description	Type	Search	Restricted Search
CHD	CHD: All of CHD & MSD Scope	CHD: All of CHD & MSD Scope ...	institution	<input checked="" type="checkbox"/>	
PCHD	PCHD: Public CHD & MSD Scope	PCHD: Public CHD & MSD Sco...	institution	<input checked="" type="checkbox"/>	
OPEN	OPEN: Open Stacks Scope (pu...		library	<input checked="" type="checkbox"/>	
OSTKS	OSTKS: Open Stacks Scope		library	<input checked="" type="checkbox"/>	
LIBRARY	LIBRARY: Owned Records Scope		collection	<input checked="" type="checkbox"/>	
PARCHIVES	PARCHIVES: Owned Records (...)		collection	<input checked="" type="checkbox"/>	
PLIBRARY	PLIBRARY: Owned Records (pu...		collection	<input checked="" type="checkbox"/>	
ARCHIVES	ARCHIVES: Owned Records Sc...		collection	<input checked="" type="checkbox"/>	
REFDESK	REFDESK: Reference Desk (pu...		library	<input checked="" type="checkbox"/>	
MSD	MSD: Owned Records Scope		collection	<input checked="" type="checkbox"/>	
CHD_STAFF_RESTRICTED	CHD_STAFF_RESTRICTED: C...		other	<input checked="" type="checkbox"/>	

Tying the Search Restrictions to the Normalization Rules

- Remember that we set this as a constant in the Staff Normalization Rules for every record in the Staff data set.

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Restrictions and Delivery Configuration Wizard](#) > [Define Restrictions for Search Scopes](#)

> Search Restrictions

Search Restrictions

Scope Name	Description	Institution	On/Off Campus	User Group	Enabled
CHD_STAFF_RESTRICTED: CHD Staff Restricted Scope		All	Anywhere	CHD Staff User	<input checked="" type="checkbox"/>

> Normalization Set Editor

Normalization Rules Set: ALEPH-CHD Section: Search Field: Restricted Search Scope

Normalization Rules for field ressearscope in PNX Section search in Normalization rules set ALEPH-CHD

Type	Value
Constant	CHD_STAFF_RESTRICTED

1 Transformation: Copy As Is Parameter:

Agenda (staff vs. public data)

- Background
- The Problem
- The Solution (Overview and Demo)
- The Solution (Details)

 Additional Material

Configure Real-Time Availability

- Staff vs. Public Real-Time Availability
- “Institution” vs “Library” vs “Collection” vs. “Other” (where the restricted search is set)
- RTA can be influenced with Scope Values of type “Library” when only a single “Library” type scope value is included along with one or more “Collection” type scope values in a view.
 - Note this is in the View Wizard > Search Scope List > Edit Search Scope. See next slide for example.
 - Real-Time Availability for the search results will favor the sub-library that “Library” type scope value refers to.

Preferred Library for RTA

- Notice that there are 3 “Collection” type scope values selected and only 1 “Library” type scope value.
- When searching using this Search Scope, Primo will prefer the results in the Open Stacks.

Search Scope Values

	Type	Name
<input type="checkbox"/>	institution	CHD: All of CHD & MSD Scope
<input type="checkbox"/>	institution	PCHD: Public CHD & MSD Scope
<input type="checkbox"/>	library	OPEN: Open Stacks Scope (public)
<input checked="" type="checkbox"/>	library	OSTKS: Open Stacks Scope
<input type="checkbox"/>	library	AVL: Audiovisual Library Scope
<input type="checkbox"/>	library	VRL: Video Resource Library Scope
<input type="checkbox"/>	collection	DCMS-FHD: Owned Records Scope
<input type="checkbox"/>	collection	DCMS-CHD: Owned Records Scope
<input type="checkbox"/>	collection	BYUP-CONTENTDM: BYU Provo Digital Collections
<input type="checkbox"/>	collection	PMUSEUM: Owned Records (public)
<input type="checkbox"/>	library	MLIB: Museum Library
<input type="checkbox"/>	library	VAULT: Vault Scope
<input type="checkbox"/>	library	SSTKS: Secure Stacks Scope
<input type="checkbox"/>	library	PROJ: Special Projects Scope
<input type="checkbox"/>	library	CSTOR: Cold Storage Scope
<input type="checkbox"/>	library	HSITE: Historic Sites Scope
<input checked="" type="checkbox"/>	collection	MUSEUM: Owned Records Scope
<input type="checkbox"/>	library	OTHER: Other Locations Scope
<input type="checkbox"/>	library	GMRV: Granite Mountain Scope
<input checked="" type="checkbox"/>	collection	LIBRARY: Owned Records Scope
<input type="checkbox"/>	collection	PARCHIVES: Owned Records (public)
<input type="checkbox"/>	collection	PLIBRARY: Owned Records (public)
<input checked="" type="checkbox"/>	collection	ARCHIVES: Owned Records Scope

Real-time Availability

- Sometimes RTA doesn't work properly
 - Check PNX <avallibrary> \$\$I (display section).
 - Re-normalize usually fixes this.
 - RTA requires the holdings back link in PNX > Links > Link to Holdings to work. E.g. don't remove this for the Public normalization rules.

Questions



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