Normalizing Primo Changes

How Did That Get There?

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Enhancement Request

1. Primo change request
   - Committee
   - Enhancement Request form - http://goto.gil.usg.edu/changeform
   - GIL
   - Individual

2. Trello board
   - https://trello.com/b/q7au1tuB/primo-opac-change-requests
   - Committee review (CAT, OPAC, Special Collections)
   - GIL Review
Sandbox Staging

1. Find example records
   ○ Provided by requester OR
   ○ Search/use indication rules

2. Consult the experts
   ○ What fields, subfields, indicators, etc.
   ○ Establish conditions
     i. Conditional rules
     ii. exclude/include subfields
   ○ Catalogers, OPAC team, other libraries
Sandbox Staging

1. Write norm rule - three parts
   ○ Routines (1), Conditions (2), Transformations (3)
Sandbox Staging

1. Part one - Routines
1. Part two - Conditions
Sandbox Staging

1. Part three - Transformations
Sandbox Staging

Add vs Merge

- Add creates a new line in the PNX record
- Merge appends to the end of the most recent line in the PNX record, with possible delimiters
Full Author Example w/Get fname lname

Author name shows up in Prime in First Name / Last Name order... but it didn't start out like that.
Full Author Example w/Get fname lname

- Names are Last Name/First Name in cataloging records
Full Author Example w/Get fname lname

- Primo BO norm rules use routines, transformations, conditions to alter Primo display of Marc fields
- display/creator rules, first rule grabs First name from 100 $a
Full Author Example w/Get fname Iname

- Next rule grabs Last Name from 100 $a and merges (in PNX) to previous
Then next rule grabs the remaining subfields in 100 and merges those
Sandbox Staging

1. Mapping tables
   - 175+
   - Format mapping (e.g. Microfilm mapping), facet values, etc.
   - Essentially allows us to convert one value (meaningless) to another value (meaningful/readable)

2. Code tables
   - 100+
   - Basic/advanced search indexes, Display labels, etc.
   - Creates labels
Sandbox Staging

1. Adjusting sandbox views
   - Main menu (at top)
   - Brief Display
   - Full Display
   - Scopes
   - Etc.
1. Harvesting process during testing
   ○ Create set in IZ sandbox
   ○ Run “Mark Records to be republishing by NZ job” in IZ
1. Harvesting process during testing
   ○ Run Scheduled job in NZ (Monitor Jobs → Scheduled → Publishing)
1. Harvesting process during testing
   ○ Run Harvesting Pipe in Primo BO SB
1. Committee review/tweaking:
   - present staged examples
   - get info from committees to address additional conditions, display changes
   - troubleshooting incorrect records
Moving to Production

1. Final approval by OPAC Committee
   ○ Usually done via email vote or at the next OPAC meeting
2. Copy the rules from the Sandbox to Production BO
   ○ Including any changes to Mapping/Code Tables/Scopes etc.
Schedule the Renorm Pipe for the “last” Friday of the month

- Sometimes it falls on the first couple of days in the next month.
- The Renorm Pipe also runs Indexing, Hotswapping, Dedup and FRBR processes
The last piece: Adding the field to the View

The last step is adding the new field to each View (one per Institution)

This is found under the Full Display Tile
Questions?