Primo Normalization Basics

Alliance Primo functional call - Primo normalization rules overview-20131219 1901-1
Thursday, December 19, 2013 1:01 pm Chicago Time
https://exlibris.webex.com/exlibris/lsr.php?
AT=pb&SP=MC&rID=79994302&rKey=6b947e542668fcaa

Orbis-Cascade Alliance

12/19/2013
All of the information and material, including text, images, logos and product names, is either the property of, or used with permission by, Ex Libris Ltd. The information may not be distributed, modified, displayed or reproduced – in whole or in part – without the prior written permission of Ex Libris Ltd.

**TRADEMARKS**

Ex Libris, the Ex Libris logo, Aleph, SFX, SFXIT, MetaLib, DigiTool, Verde, Primo, Voyager, MetaSearch, MetaIndex and other Ex Libris products and services referenced herein are trademarks of Ex Libris, and may be registered in certain jurisdictions. All other product names, company names, marks and logos referenced may be trademarks of their respective owners.

**DISCLAIMER**

The information contained in this document is provided on an "AS IS" basis for general information purposes only without any representations or warranties, whether express or implied, including any implied warranties of satisfactory quality, completeness, accuracy or fitness for a particular purpose.

Ex Libris, and its subsidiaries and related corporations disclaim any and all liability for use of this information, even if advised of the possibility that loss, damage or expenses may arise.

© Ex Libris Ltd., 2013
Agenda

• Top 5 normalization tips
• Normalization rule customizations for the Alliance (some examples)
• Using the Normalization Editor
Top 5 Normalization Tips

Actions- ADD, OR, MERGE

Conditions – advanced search -optional

Transformations- output to pnx-mandatory

Source- (MARC field, PNX field, or Constant)

Using the NR Test utility
Actions

- Default is OR – if there are 2 rules and the action is “or” then only one field will be written to the pnx. (display/type uses or because pnx can only have one display/type per record)

- If action is ADD- then a field will be written for every rule (conditions apply) (call number)

- MERGE- concatenates the output (transformation) – delimiters are used to separate fields in the string. (course reserves display)
Routines vs Transformations

The options are identical—some validate data and some transform data.
Source

MARC Data- mapped directly from Alma/MARC record (test within individual rule)

PNX- use a pnx record and save time! (ex: display/publisher can be used to create publisher facet- (test the entire rule)

CONSTANTS- (ex: Display/Source)
Reviewing Normalization changes in Local Fields

- Display (local→lds01-course reserves)
- Search (local→lsr06-call number)
- Create Publisher Facet- (using pnx=display/publisher)
Norm Rule Test Utilities

Using the individual test utility within a rule group (adding local search field)

Using the test utility for the entire record (adding a new facet from existing pnx field)

Primo Home > Advanced Configuration > Full Normalization Rule Configuration
Recommended Reading

- Primo Administrator Guide
- Primo Technical Guide
- Primo Back Office Guide - available from BO help link (search “transformation”)