

# Primo Administration: Pipes Configuration

## 1. Primo Administration: Pipes Configuration

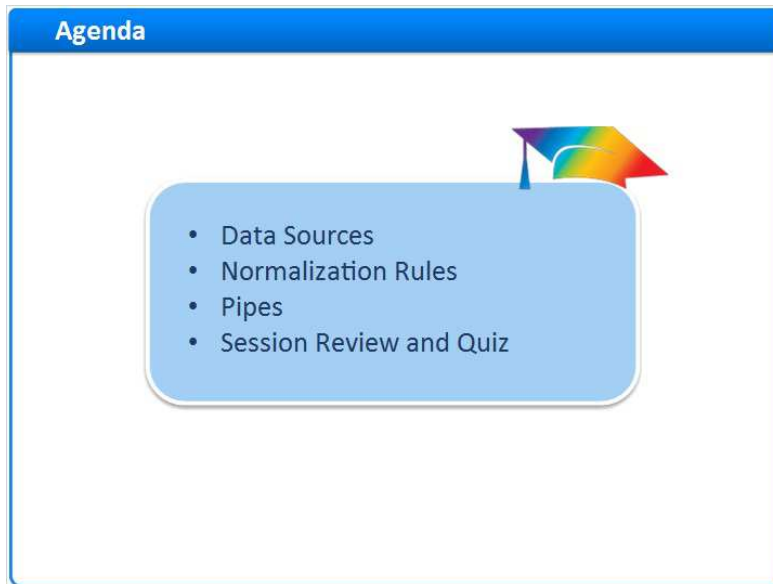
### *1.1 Primo Administration: Pipes Configuration*



#### **Notes:**

Hello, and welcome to this session on Primo Pipes Configuration.

## 1.2 Agenda



### Notes:

In this session, we'll walk through the steps needed to load data into Primo. First, a data source must be created, a normalization rule must be in place, and a pipe needs to be configured to instruct Primo where to harvest and how to load the data.

After a session review, there will be a short quiz to test your knowledge.

## 1.3 Data Sources

### Agenda

- Data Sources
- Normalization Rules
- Pipes
- Session Review and Quiz

### Notes:

Data Sources

## 1.4 Data Source Configuration

### Data Source Configuration

Primo Back Office - Training Server

Welcome to Primo Back Office - monitor and configure your settings

Home Deploy & Utilities General Local Data Publishing PE & Delivery Search Engine

Monitoring & Maintenance

- 1 Monitor Primo Status
- 2 Primo Utilities
- 3 Primo Analytics
- 4 Primo Reports
- 5 Schedule Tasks
- 6 PRX Viewer

Configuration & Management wizards

- 1 Ongoing Configuration Wizards
- 2 Advanced Configuration

Hour	Total Searches	Rows Returned
16	2.5	10000
17	1.5	15000

Deploy All

### Notes:

To configure the data source, we can go to Ongoing Configurations > Pipe Configuration Wizard > Data Sources Configuration. We can also get to the Data Sources list by selecting Local Data > Data Sources in the navigation bar at the top of the screen.

In the Data Sources List, we can see any data sources that have already been created in our institution. Our list is currently blank, so let's create one.

## Pipe Configuration Wizard (Slide Layer)



## Data Sources Configuration (Slide Layer)

The screenshot shows the 'Data Source Configuration' slide layer. At the top, there is a blue header with the text 'Data Source Configuration'. Below the header, the page title is 'Primo Back Office - Training Server'. A breadcrumb trail reads 'Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard'. A navigation menu includes 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. On the right, there are links for 'About', 'Logout', and 'Help', along with the 'ExLibris primo' logo and the user 'Hello admin!'. The main content area features a 'Pipe Configuration Wizard' section with several options: 'Data Sources Configuration' (highlighted with an orange box), 'Scope Values Configuration', 'Normalization Mapping Tables', 'Normalization Rules configuration', 'Enrichment Sets Configuration', and 'Pipes Configuration'. Each option includes a brief description of its function.

## Data Sources List (Slide Layer)

The screenshot shows the 'Data Sources List' slide layer. It has a blue header with 'Data Source Configuration'. The page title is 'Primo Back Office - Training Server'. The breadcrumb trail is 'Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Data Sources Configuration'. The navigation menu and user information are the same as in the previous slide. The main content area is titled 'Data Sources' and includes a sub-section 'Owner: TRAN\_ALMA Institution' with a 'Display Template Data Sources' checkbox. Below this is a table with columns: 'Owner', 'Source Name', 'Source Code', 'Description', 'Source System', 'File Splitter', and 'Source Format'. The table is currently empty. Below the table is an 'Add a New Data Source' form with the following fields: 'Owner' (dropdown: TRAN\_ALMA Institution), 'Source name' (text input), 'Source code' (text input), 'Source system' (dropdown: Select a Source System), 'Source format' (dropdown: Select a Source Format), 'Version' (text input), 'Original Source Code' (text input), 'File needs transformation' (checkbox), 'Transformation file name' (text input), 'XREF keys' (dropdown: ILLCO, OCLC, ISBN), 'File Splitter' (dropdown: Select a File Splitter), 'Character set' (dropdown: UTF-8), and 'Input Record Path' (text input: record). At the bottom, there are 'Cancel & Go back' and 'Pipe Configuration Wizard' buttons.

## Navigation path (Slide Layer)

The screenshot shows the 'Data Source Configuration' page in the 'Primo Back Office - Training Server'. The breadcrumb trail is: Home > Deploy & Utilities > General > Local Data > Publishing > PE & Delivery > Search Engine. The 'Local Data' menu is open, showing a list of options: Data Sources (highlighted with an orange box), Scope Values, Normalization Sets, Enrichment Sets, Publishing Mapping Tables, Restricted Search Scopes, and Restricted Delivery Scopes. Below the menu, there is a table with columns: Owner, Source Name, Description, Source System, File Splitter, and Source Format. The 'Add a New Data Source' section contains various input fields: Owner (dropdown), Source system (dropdown), File needs transformation (checkbox), XREF keys (checkbox), File Splitter (dropdown), Character Set (dropdown), Input Record Path (text field), Source name (text field), Source format (dropdown), Transformation file name (dropdown), Source code (text field), Version (text field), and Original Source Code (text field). At the bottom, there are 'Cancel & Go back' and 'Add' buttons.

## Data sources list default (Slide Layer)

The screenshot shows the 'Data Source Configuration' page in the 'Primo Back Office - Training Server'. The breadcrumb trail is: Home > Deploy & Utilities > General > Local Data > Publishing > PE & Delivery > Search Engine. The 'Data Sources' section is active, showing a table with columns: Owner, Source Name, Source Code, Description, Source System, File Splitter, and Source Format. The table is currently empty. Below the table, there is a 'Display Template Data Sources' checkbox. The 'Add a New Data Source' section contains various input fields: Owner (dropdown), Source system (dropdown), File needs transformation (checkbox), XREF keys (checkbox), File Splitter (dropdown), Character Set (dropdown), Input Record Path (text field), Source name (text field), Source format (dropdown), Transformation file name (dropdown), Source code (text field), Version (text field), and Original Source Code (text field). At the bottom, there are 'Cancel & Go back' and 'Add' buttons.

## 1.5 Adding a Data Source

The screenshot shows the 'Adding a Data Source' form in the Primo Back Office. The form is titled 'Adding a Data Source' and is part of the 'Primo Back Office - Training Server' interface. It includes a navigation menu with options like 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. The main content area is titled 'Data Sources' and shows a table with columns for 'Owner', 'Source Name', 'Source Code', 'Description', 'Source System', 'File Splitter', and 'Source Format'. Below the table is the 'Add a New Data Source' form, which includes fields for 'Owner' (set to 'TRAIN\_ALMA Institution'), 'Source name', 'Source code', 'Source system' (set to 'Select a Source System'), 'Source format' (set to 'Select a Source Format'), 'Version', 'Original Source Code', 'File needs transformation' (checkbox), 'Transformation file name', 'XREF keys' (with options like 'I COA', 'OCLC', 'ISSN', 'ISBN'), 'File Splitter' (set to 'Select a File Splitter'), 'Character Set' (set to 'UTF 8'), and 'Input Record Path' (set to 'record'). There is an 'Add' button at the bottom right of the form.

### Notes:

To add a new data source, we would ensure the Owner is set to the correct institution, and then enter in a Source Name (TRAIN\_ALMA\_DS) and a Source Code (TRAIN\_ALMA\_DS). Since the source code is used as the prefix for the Primo Record ID, it should not contain spaces.

Then we would select the Source System, in this case, Alma, and the source format, which in this case is MARC 21.

The Version refers to the source system's version, and is not required.

The 'File Needs Transformation' checkbox and transformation filename drop down allow you to specify an XSL transformation routine to apply to the source records if needed. For the data source we're configuring here, it is not needed.

The original source code, however, is necessary - for this data source, we'll be using the Alma institution code (TR\_INTEGRATION\_INST) as our original source code.

We can leave the crossref keys set to their defaults, but we will need to select a file splitter. The file splitter is used to identify the beginning and ending of each record in the file. For Alma data, the OAI splitter is used. We can keep UTF-8 for the character set, and the input record path is automatically filled in based on the source format, so we can keep the default value here as well.

Finally, we can enter in a description here before clicking 'Add' to create the new data source.

## Enter source name (Slide Layer)

**Adding a Data Source**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Data Sources**

Owner: TRAN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format
-------	-------------	-------------	-------------	---------------	---------------	---------------

**Add a New Data Source**

Owner: TRAN\_ALMA Institution  Source code:

Source system:  Source format:  Version:

File needs transformation Transformation file name:  Original Source Code:

XREF keys:  ICCC, OCLC, ISBN, ISBN

File Splitter:  Character Set:  Input Record Path:

Description:

Pipe Configuration Wizard

## Enter source code (Slide Layer)

**Adding a Data Source**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Data Sources**

Owner: TRAN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format
-------	-------------	-------------	-------------	---------------	---------------	---------------

**Add a New Data Source**

Owner: TRAN\_ALMA Institution  Source code:

Source system:  Source format:  Version:

File needs transformation Transformation file name:  Original Source Code:

XREF keys:  ICCC, OCLC, ISBN, ISBN

File Splitter:  Character Set:  Input Record Path:

Description:

Pipe Configuration Wizard

## Select source system (Slide Layer)

**Adding a Data Source**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Data Sources**

Owner: TRAIN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format
-------	-------------	-------------	-------------	---------------	---------------	---------------

**Add a New Data Source**

Owner: TRAIN\_ALMA Institution

Source system: **Select a Source System**

File needs transformation

XREF keys: Alma, Horizon, Other, Tels

File Splitter: Digital

Description: PICA, Meta 2, SFX, Qpac, Ill, Alma

Source name: TRAIN\_ALMA\_DS

Source format: Select a Source Format

Transformation file name: [ ]

Source code: TRAIN\_ALMA\_DS

Version: [ ]

Original Source Code: [ ]

Character Set: UTF-8

Input Record Path: record

Cancel & Go back Pipe Configuration Wizard

## Select source format (Slide Layer)

**Adding a Data Source**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Data Sources**

Owner: TRAIN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format
-------	-------------	-------------	-------------	---------------	---------------	---------------

**Add a New Data Source**

Owner: TRAIN\_ALMA Institution

Source system: Alma

File needs transformation

XREF keys: LOCC, OCLC, ISBN, ISBN

File Splitter: Select a File Splitter

Description: [ ]

Source name: TRAIN\_ALMA\_DS

Source format: **Select a Source Format**

Transformation file name: [ ]

Source code: TRAIN\_ALMA\_DS

Version: [ ]

Original Source Code: [ ]

Character Set: [ ]

Input Record Path: record

Cancel & Go back Pipe Configuration Wizard

## Version (Slide Layer)

**Adding a Data Source**

Primo Back Office - Training Server About Logout Help

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#) ExLibris Primo Help: admin

**Data Sources**

Owner: TRAN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format
-------	-------------	-------------	-------------	---------------	---------------	---------------

**Add a New Data Source**

Owner:  Source name:  Source code:

Source system:  Source format:  **Version**

File needs transformation Transformation file name:  Original Source Code:

XREF keys:

File Splitter:  Character Set:  Input Record Path:

Description:

Pipe Configuration Wizard

## File needs transformation (Slide Layer)

**Adding a Data Source**

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**Data Sources**

Owner: TRAN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format
-------	-------------	-------------	-------------	---------------	---------------	---------------

**Add a New Data Source**

Owner:  Source name:  Source code:

Source system:  Source format:  Version:

File needs transformation Transformation file name:  Original Source Code:

XREF keys:

File Splitter:  Character Set:  Input Record Path:

Description:

Pipe Configuration Wizard

## Original source code (Slide Layer)

**Adding a Data Source**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Data Sources**

Owner: TRAIN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format
-------	-------------	-------------	-------------	---------------	---------------	---------------

**Add a New Data Source**

Owner: TRAIN\_ALMA Institution Source name: TRAIN\_ALMA\_DS Source code: TRAIN\_ALMA\_DS  
Source system: Alma Source format: MARC21 Transformation file name: Version: Original Source Code: TR\_INTGR

File needs transformation

XREF keys: ICCC, OCLC, ISBN, ISBN

File Splitter: Select a File Splitter Character Set: UTF-8 Input Record Path: record

Description:

Cancel & Go back Pipe Configuration Wizard

## Xref keys (Slide Layer)

**Adding a Data Source**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Data Sources**

Owner: TRAIN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format
-------	-------------	-------------	-------------	---------------	---------------	---------------

**Add a New Data Source**

Owner: TRAIN\_ALMA Institution Source name: TRAIN\_ALMA\_DS Source code: TRAIN\_ALMA\_DS  
Source system: Alma Source format: MARC21 Transformation file name: Version: Original Source Code: TR\_INTGR

File needs transformation

XREF keys: ICCC, OCLC, ISBN, ISBN

File Splitter: Select a File Splitter Character Set: UTF-8 Input Record Path: record

Description:

Cancel & Go back Pipe Configuration Wizard

## Select file splitter (Slide Layer)

**Adding a Data Source**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Data Sources**

Owner: TRAIN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format
-------	-------------	-------------	-------------	---------------	---------------	---------------

**Add a New Data Source**

Owner: TRAIN\_ALMA Institution Source name: TRAIN\_ALMA\_DS Source code: TRAIN\_ALMA\_DS  
Source system: Alma Source format: MARC21 Transformation file name: Original Source Code: TR\_INTGR  
 File needs transformation

XREF keys: ICCC, OCLC, ISSN, ISBN

File Splitter: **Select a File Splitter** Character Set: UTF-8 Input Record Path: record

Description: **DA splitter**

Cancel & Go back Pipe Configuration Wizard

## UTF-8 char set (Slide Layer)

**Adding a Data Source**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Data Sources**

Owner: TRAIN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format
-------	-------------	-------------	-------------	---------------	---------------	---------------

**Add a New Data Source**

Owner: TRAIN\_ALMA Institution Source name: TRAIN\_ALMA\_DS Source code: TRAIN\_ALMA\_DS  
Source system: Alma Source format: MARC21 Transformation file name: Original Source Code: TR\_INTGR  
 File needs transformation

XREF keys: ICCC, OCLC, ISSN, ISBN

File Splitter: DA splitter Character Set: **UTF-8** Input Record Path: record

Description:

Cancel & Go back Pipe Configuration Wizard

## Input record path (Slide Layer)

**Adding a Data Source**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Data Sources**

Owner: TRAN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format
-------	-------------	-------------	-------------	---------------	---------------	---------------

**Add a New Data Source**

Owner: TRAN\_ALMA Institution Source name: TRAN\_ALMA\_DS Source code: TRAN\_ALMA\_DS  
Source system: Alma Source format: MARC21 Transformation file name: Original Source Code: TR\_INTGR  
 File needs transformation

XREF keys: ICCC, OCLC, ISSN, ISBN

File Splitter: O/Splitter Character Set: UTF-8 **Input Record Path: record**

Description:

Cancel & Go back Pipe Configuration Wizard

## Description (Slide Layer)

**Adding a Data Source**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Data Sources**

Owner: TRAN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format
-------	-------------	-------------	-------------	---------------	---------------	---------------

**Add a New Data Source**

Owner: TRAN\_ALMA Institution Source name: TRAN\_ALMA\_DS Source code: TRAN\_ALMA\_DS  
Source system: Alma Source format: MARC21 Transformation file name: Original Source Code: TR\_INTGR  
 File needs transformation

XREF keys: ICCC, OCLC, ISSN, ISBN

File Splitter: O/Splitter Character Set: UTF-8 Input Record Path: record

**Description:**

Cancel & Go back Pipe Configuration Wizard

## Add data source (Slide Layer)

**Adding a Data Source**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing PE & Delivery Search Engine

**Data Sources**

Owner: TRAIN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format
TRAIN_ALMA Institution	TRAIN_ALMA_DS	TRAIN_ALMA_DS	Alma training server	Alma	OAI splitter	MARC21

**Add a New Data Source**

Owner: TRAIN\_ALMA Institution Source name: TRAIN\_ALMA\_DS Source code: TRAIN\_ALMA\_DS

Source system: Alma Source format: MARC21 Transformation file name: Original Source Code: TR\_INTGR

File needs transformation

XREF keys: I.CCN, OCLC, ISSN, ISBN

File Splitter: OAI splitter Character Set: UTF-8 Input Record Path: record **Add**

Description:

[Cancel & Go back](#)  
Pipe configuration wizard

## 1.6 Editing a Data Source

**Editing a Data Source**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing PE & Delivery Search Engine

**Data Sources**

Owner: TRAIN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format	
TRAIN_ALMA Institution	TRAIN_ALMA_DS	TRAIN_ALMA_DS	Alma training server	Alma	OAI splitter	MARC21	<a href="#">Edit</a> <a href="#">Delete</a>

**Add a New Data Source**

Owner: TRAIN\_ALMA Institution Source name: Source code:

Source system: Select a Source System Source format: Select a Source Format Version:

File needs transformation Transformation file name: Original Source Code:

XREF keys: I.CCN, OCLC, ISSN, ISBN

File Splitter: Select a File Splitter Character Set: UTF-8 Input Record Path: record **Add**

Description:

[Cancel & Go back](#)  
Pipe configuration wizard

### Notes:

Now we can see the data source we've created in the list. I can edit and see the details of this data source after it has been created by clicking edit here in the list. If I wanted to edit any of the parameters I've entered, I would do so and click Save and Continue to go back to the Data Sources list.

Now that we're done configuring the data source, I'm going to click 'Cancel and Go Back' to return to the Primo

Home page.

## Click edit (Slide Layer)

**Editing a Data Source**

Primo Back Office - Training Server

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

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

Help: admin

**Data Sources**

Owner: TRAIN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format	
TRAIN_ALMA Institution	TRAIN_ALMA_DS	TRAIN_ALMA_DS	Alma training server	Alma	OAI splitter	MARC21	<a href="#">Edit</a> <a href="#">Delete</a>

**Add a New Data Source**

Owner: TRAIN\_ALMA Institution

Source name:

Source code:

Source system: Select a Source System

Source format: Select a Source Format

Version:

Original Source Code:

File needs transformation

Transformation file name:

XREF keys: I.CCN, O.C.C, ISSN, ISBN

File Splitter: Select a File Splitter

Character Set: UTF-8

Input Record Path: record

Pipe Configuration Wizard

## Edit screen (Slide Layer)

**Editing a Data Source**

Primo Back Office - Training Server

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

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

Help: admin

**Data Sources**

**Data Source Attributes for TRAIN\_ALMA\_DS**

**Source Description**

Owner: TRAIN\_ALMA Institution

Source name: TRAIN\_ALMA\_DS

Source code: TRAIN\_ALMA\_DS

Source format: MARC21

Description: Alma training server

Original Source Code: TR\_BIBLIOTHECAI\_OAI\_SPLIT

**Source Definition**

Source system: Alma

File Splitter: OAI splitter

Character Set: UTF-8

Transformation file name:

Version:

Input Record Path: record

XREF keys: I.CCN, O.C.C, ISSN, ISBN

File needs transformation

Created: Nov 20, 2015. Last updated: Nov 23, 2015 by admin

to Data Sources List

## Save and continue (Slide Layer)

Editing a Data Source

**Primo Back Office - Training Server** About Logout Help

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

ExLibris Primo

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine Hello admin

**Data Sources**

Data Source Attributes for TRAIN\_ALMA\_DS

<b>Source Description</b>	Owner: TRAIN_ALMA Institution	Source name: TRAIN_ALMA_DS	Source code: TRAIN_ALMA_DS
	Source format: MARC21	Description: Alma training server	Original Source Code: TRN_INTEGRATION_INST
<b>Source Definition</b>	Source system: Alma	Character Set: UTF-8	Version:
	File Splitter: OAI splitter	Transformation file name:	Input Record Path: record
	<input type="checkbox"/> File needs transformation		<b>XREF keys</b> LOCC OCLC ISSN ISBN

Created: Nov 20, 2015. Last updated: Nov 23, 2015 by admin

Save & Continue

## Data sources list (Slide Layer)

Editing a Data Source

**Primo Back Office - Training Server** About Logout Help

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

ExLibris Primo

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine Hello admin

**Data Sources**

Owner: TRAIN\_ALMA Institution  Display Template Data Sources

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format	
TRAIN_ALMA Institution	TRAIN_ALMA_DS	TRAIN_ALMA_DS	Alma training server	Alma	OAI splitter	MARC21	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

**Add a New Data Source**

Owner: TRAIN_ALMA Institution	Source name:	Source code:	Source format: Select a Source Format
<input type="checkbox"/> File needs transformation	Transformation file name:	Version:	Original Source Code:
<b>XREF keys</b> LOCC OCLC ISSN ISBN	Character Set: UTF-8	Input Record Path: record	
File Splitter: Select a File Splitter	Description:		

## Cancel and go back (Slide Layer)

**Editing a Data Source**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Data Sources**

Owner	Source Name	Source Code	Description	Source System	File Splitter	Source Format	
IRWAN_ALMA Institution	TRAIN_ALMA_DS	TRAIN_ALMA_DS	Alma training server	Alma	OAI splitter	MARC21	<a href="#">Edit</a> <a href="#">Delete</a>

**Add a New Data Source**

Owner: TRAIN\_ALMA Institution Source name: Source code: Source system: Select a Source System Source format: Select a Source Format File needs transformation: Transformation file name Original Source Code XREF keys: ICCC, OCLC, ISSN, ISBN File Splitter: Select a File Splitter Character Set: UTF-8 Input Record Path: record [Add](#)

[Cancel & Go Back](#)  
If you go to Configuration Wizards

## Primo home page (Slide Layer)

**Editing a Data Source**

Primo Back Office - Training Server

Welcome to Primo Back Office - monitor and configure your settings

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Monitoring & Maintenance**

- 1. **Monitor Primo Status**  
Stay in control with one glance of all aspects of Primo performance.
- 2. **Primo Utilities**  
Cleanup procedures and more.
- 3. **Primo Analytics**  
View and print reports.
- 4. **Primo Reports**  
View available reports or create a new report.
- 5. **Schedule Tasks**  
Schedule Primo tasks such as harvesting, reloading indexes and more.
- 6. **PNX Viewer**  
Browse PNX files.

**Configuration & Management wizards**

- 1. **Ongoing Configuration Wizards**  
Configure and manage the Staff, Institutions, Views, Data sources and pipes settings to maintain the proper function of Primo.
- 2. **Advanced Configuration**  
Manage the advanced features of Primo, like Search history, Installers, UI and PNX.

**Performance Graph**

Open OK Process OK Search OK EDPS/CDI Not OK

Total Searches (Left Y-axis, 0-3) and Rows Returned (Right Y-axis, 0-120,000) vs. Hour (X-axis, 16-17)

Deploy All  
Deploy all

## 1.7 Normalization Rules

### Agenda

- Data Sources
- **Normalization Rules**
- Pipes
- Session Review and Quiz

### Notes:

Normalization Rules

## 1.8 Normalization Rules Configuration

### Normalization Rules

Primo Back Office - Training Server

Welcome to Primo Back Office - monitor and configure your settings

Home Deploy & Utilities General Local Data Publishing PE & Delivery Search Engine

Monitoring & Maintenance

- 1 Monitor Primo Status
- 2 Primo Utilities
- 3 Primo Analytics
- 4 Primo Reports
- 5 Schedule Tasks
- 6 PDK Viewer

Configuration & Management wizards

- 1 **Ongoing Configuration Wizards**
- 2 Advanced Configuration

Hour	Total Searches	Rows Returned
16	2.5	10000
17	1.5	15000

Deploy All

### Notes:

The next step in loading data into Primo is to determine which normalization rules will be used to process the data.

To access the normalization rules, we go to Ongoing Configurations > Pipe Configuration Wizard > Normalization Rules Configuration. We can also get to the Normalization Rules by selecting Local Data > Normalization Sets in the navigation bar at the top of the screen.

As part of the publishing process, the data from our source systems needs to be transformed, or normalized, into Primo's standard format, the Primo Normalized XML.

To perform the normalization, the system applies a set of rules to the source data. Right now, we do not have a customized normalization rule in place, but if I select 'Display Template NR', we can see the list of template normalization rules. Near the bottom of the page, we can see a normalization rule for the Alma MARC data. For today's session we will be using this template, but it is possible to copy the template and customize it based on your institution's needs.

Now that I've confirmed which normalization rule we're going to use, I'm going to click 'Back' to return to the Primo Home Page.

## Pipe configuration (Slide Layer)



## Norm rules configuration (Slide Layer)

**Normalization Rules**

Primo Back Office - Training Server About Logout Help

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard ExLibris Primo

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine Hello admin!

- Pipe Configuration Wizard
- Data Sources Configuration  
Manage and configure Data Sources
- Scope Values Configuration  
Manage and configure Scopes
- Normalization Mapping Tables  
Manage the Normalization mapping table values
- Normalization Rules configuration**  
Manage and configure Normalization rules
- Enrichment Sets Configuration  
Manage and configure enrichment sets
- Pipes Configuration  
Manage and configure Pipes

## Normalization rules list (Slide Layer)

**Normalization Rules**

Primo Back Office - Training Server About Logout Help

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Normalization Rules configuration ExLibris Primo

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine Hello admin!

➤ Normalization Rules Sets

**Normalization Rules Sets**

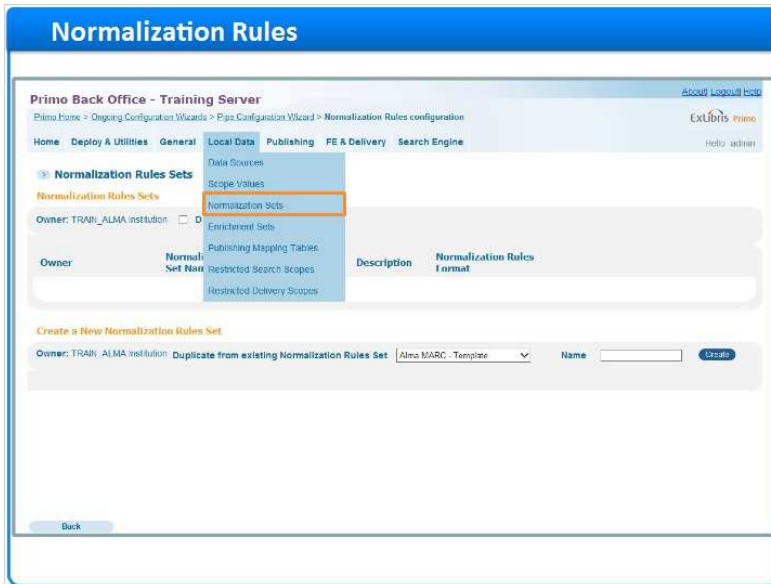
Owner: TRAI\ALMA Institution  Display Template NR

Owner	Normalization Rules Set Name	Version	Description	Normalization Rules Format
-------	------------------------------	---------	-------------	----------------------------

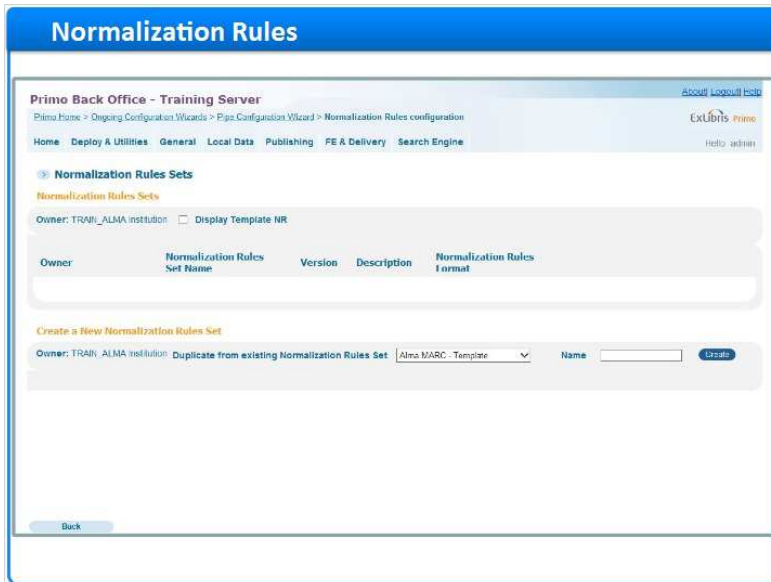
Create a New Normalization Rules Set

Owner: TRAI\ALMA Institution Duplicate from existing Normalization Rules Set Alma MARC Template Name

## Navigation menu (Slide Layer)



## Norm rules list (Slide Layer)



## Display template NR (Slide Layer)

The screenshot shows the 'Normalization Rules' configuration page in the Primo Back Office. The page title is 'Primo Back Office - Training Server'. The breadcrumb trail is 'Primo Home > Ongoing Configuration/Wizards > Pige Configuration Wizard > Normalization Rules configuration'. The navigation menu includes 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. The user is logged in as 'helo admin'. The 'Normalization Rules Sets' section is active, and the 'Display Template NR' checkbox is checked and highlighted with an orange box. Below the checkbox is a table listing various normalization rule sets.

Owner	Normalization Rules Set Name	Version	Description	Normalization Rules Format
OTB	Unicorn - Template	18		marc <a href="#">View</a>
OTB	Voyager - Template	18		marc <a href="#">View</a>
OIB	ALEPH MAB - Template	5		marc <a href="#">View</a>
OTM	DigiText DC - Template	6		digital_entry <a href="#">View</a>
OTB	Generic MARC - Template	18		marc <a href="#">View</a>
OIB	Generic Dublin Core - Template	8		dublin_core <a href="#">View</a>
OTM	Alma UNIMARC - Template	6		marc <a href="#">View</a>
OTB	ALEPH darMARC2 - Template	10		marc <a href="#">View</a>
OIB	ALMA KORMARC - Template	23		marc <a href="#">View</a>
OTM	Generic darMARC2 - Template	5		marc <a href="#">View</a>

## List of template NR (Slide Layer)

This screenshot is identical to the one above, showing the 'Normalization Rules' configuration page. The 'Display Template NR' checkbox is checked. The table below the checkbox lists the normalization rule sets. The table is highlighted with an orange border.

Owner	Normalization Rules Set Name	Version	Description	Normalization Rules Format
OTB	Unicorn - Template	18		marc <a href="#">View</a>
OTB	Voyager - Template	18		marc <a href="#">View</a>
OIB	ALEPH MAB - Template	5		marc <a href="#">View</a>
OTM	DigiText DC - Template	6		digital_entry <a href="#">View</a>
OTB	Generic MARC - Template	18		marc <a href="#">View</a>
OIB	Generic Dublin Core - Template	8		dublin_core <a href="#">View</a>
OTM	Alma UNIMARC - Template	6		marc <a href="#">View</a>
OTB	ALEPH darMARC2 - Template	10		marc <a href="#">View</a>
OIB	ALMA KORMARC - Template	23		marc <a href="#">View</a>
OTM	Generic darMARC2 - Template	5		marc <a href="#">View</a>

## Scroll down (Slide Layer)

### Normalization Rules

OTB	Generic danMARC - Template	3	marc	<a href="#">View</a>
OTB	Generic LHMARC - Template	7	marc	<a href="#">View</a>
OTB	Zini - Template	2	xml	<a href="#">View</a>
OTB	WARC - Template	2	xml	<a href="#">View</a>
OTB	MetLib KB - Template	4	metab	<a href="#">View</a>
OTB	Complex Zini - Template	2	complex_xml	<a href="#">View</a>
OTB	Alma Dublin Core - Template	5	dublin_core	<a href="#">View</a>
OTB	SFX - Template	19	marc	<a href="#">View</a>
OTB	Digital MARC - Template	17	digital_embryo	<a href="#">View</a>
OTB	ALEPH UNIMARC - Template	7	marc	<a href="#">View</a>
OTB	ALEPH KORMARC - Template	8	marc	<a href="#">View</a>
OTB	ALEPH MARC - Template	18	marc	<a href="#">View</a>
OTB	Alma MARC - Template	22	marc	<a href="#">View</a>

Create a New Normalization Rules Set

Owner: TRAVI\_ALMA Institution Duplicate from existing Normalization Rules Set Alma MARC - Template Name  [Create](#)

[Back](#)

## Primo home (Slide Layer)

### Normalization Rules

Primo Back Office - Training Server [About](#) [Logout](#) [Help](#)

Welcome to Primo Back Office - monitor and configure your settings

EXLibris [Primo](#)

Home [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#)

Home admin

#### Monitoring & Maintenance

- 1. **Monitor Primo Status**  
Stay in control with one glance of all aspects of Primo performance.
- 2. **Primo Utilities**  
Cleanup procedures and more.
- 3. **Primo Analytics**  
View and filter reports.
- 4. **Primo Reports**  
View available reports or create a new report.
- 5. **Schedule Tasks**  
Schedule Primo tasks such as harvesting, reloading indexes and more.
- 6. **PNX Viewer**  
Browse PNX files.

Hour	Total Searches	Rows Returned
16	2.5	100,000
17	1.5	120,000

[Deploy All](#)  
Deploy all

#### Configuration & Management wizards

- 1. **Ongoing Configuration Wizards**  
Configure and manage the Staff, Institutions, Views, Data sources and pipes settings to maintain the proper function of Primo.
- 2. **Advanced Configuration**  
Manage the advanced features of Primo, like Search history, Install.com, UI and PNX.

## 1.9 Pipes

### Agenda

- Data Sources
- Normalization Rules
- **Pipes**
- Session Review and Quiz

### Notes:

Pipes

## 1.10 Pipes Configuration

### Pipes Configuration

Primo Back Office - Training Server

Welcome to Primo Back Office - monitor and configure your settings

Home Deploy & Utilities General Local Data Publishing PE & Delivery Search Engine

Monitoring & Maintenance

- 1 Monitor Primo Status
- 2 Primo Utilities
- 3 Primo Analytics
- 4 Primo Reports
- 5 Schedule Tasks
- 6 PDK Viewer

Configuration & Management wizards

- 1 **Ongoing Configuration Wizards**
- 2 Advanced Configuration

Hour	Total Searches	Rows Returned
16	2.5	100,000
17	1.5	150,000

Deploy All

### Notes:

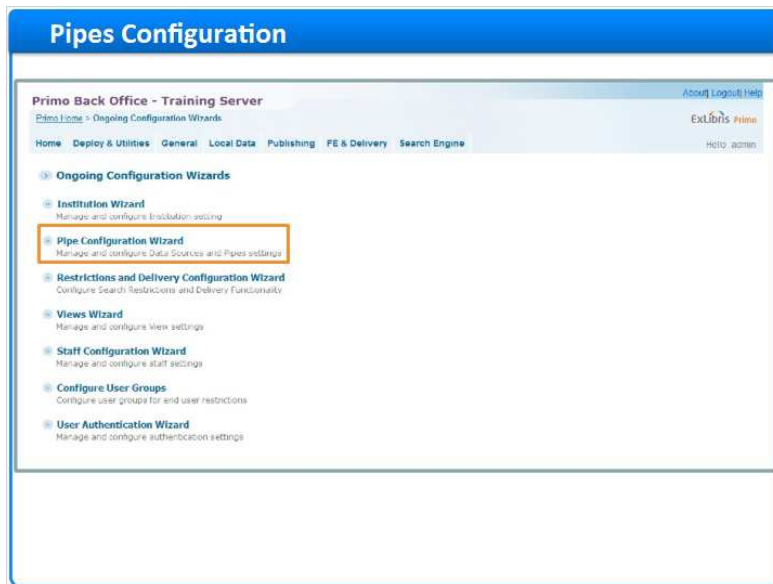
Now we're ready to configure the pipe to load the data into Primo.

To access the pipe configuration, we go to Ongoing Configurations > Pipe Configuration Wizard > Pipes Configuration, Define Pipe. You'll notice that I am brought immediately into the pipe creation screen. We can also get to the Pipes creation by selecting Publishing > Create a New Pipe in the navigation bar at the top of the screen.

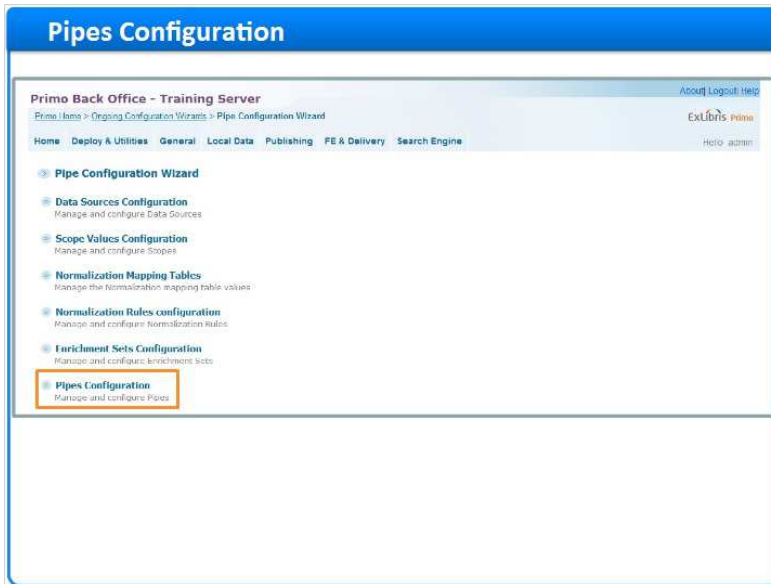
If we wanted to see the list of pipes that have already been created, we could use the Pipe List link here in the navigation bar, or we could use the 'Back to Pipes List' link at the bottom of the screen.

For now, let's stay in this screen and see how a pipe is created.

## Pipe configuration wizard (Slide Layer)

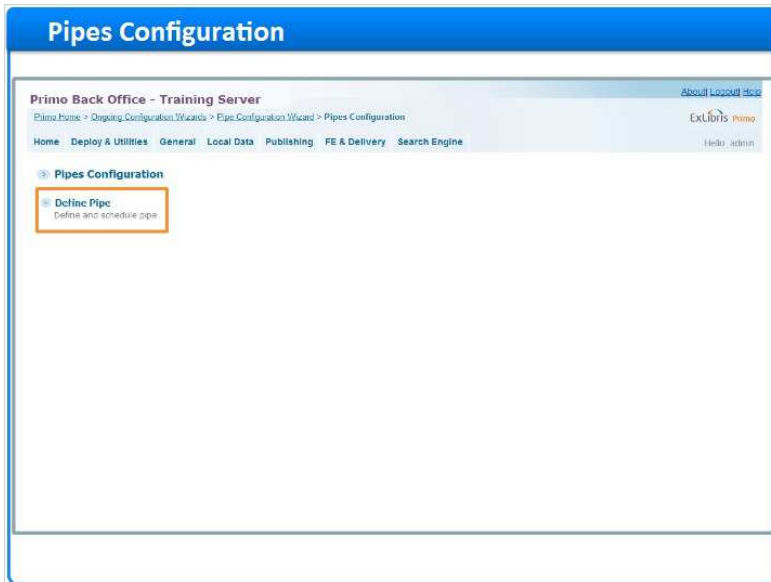


## Manage and configure pipes (Slide Layer)



The screenshot shows the 'Pipes Configuration' page in the Primo Back Office. The page title is 'Pipes Configuration'. Below the title, there is a breadcrumb trail: 'Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard'. The page is divided into several sections, each with a plus icon and a title: 'Pipe Configuration Wizard', 'Data Sources Configuration', 'Scope Values Configuration', 'Normalization Mapping Tables', 'Normalization Rules configuration', 'Enrichment Sets Configuration', and 'Pipes Configuration'. The 'Pipes Configuration' section is highlighted with an orange box. The page also includes a navigation menu with links for 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. In the top right corner, there are links for 'About', 'Logout', and 'Help', and a user profile for 'Hello admin'.

## Define a pipe (Slide Layer)



The screenshot shows the 'Pipes Configuration' page in the Primo Back Office. The page title is 'Pipes Configuration'. Below the title, there is a breadcrumb trail: 'Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration'. The page is divided into several sections, each with a plus icon and a title: 'Pipes Configuration' and 'Define Pipe'. The 'Define Pipe' section is highlighted with an orange box. The page also includes a navigation menu with links for 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. In the top right corner, there are links for 'About', 'Logout', and 'Help', and a user profile for 'Hello admin'.

## Define pipe screen (Slide Layer)

**Pipes Configuration**

Primo Back Office - Training Server

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

Define Pipe

Owner: TRAN\_ALMA Institution Pipe Name: Pipe Type: Regular

Pipe Description:

**Source**

Data Source: TRAN\_ALMA\_DS  
Harvesting method: FTP  
Username: Password: Source directory:  Delete after copy  
Start harvesting fresh records from: Dec 18, 2016  
Start time: 20:57:24

**Normalization and Enrichment**

Normalization Mapping Set: Alma MARC - Template  
Encoded Set: Alma MARC - Template  
Harvest File Format: tar.gz  Force DEDUP  
System Last Copy: PRBR  Force FPCR  
Configure Server Locals:

**Errors**

Priority: Medium  
Maximum error threshold: 5% (1-100)

Back to Pipes List Save

## Top nav - create (Slide Layer)

**Pipes Configuration**

Primo Back Office - Training Server

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

Define Pipe

Owner: TRAN\_ALMA Institution Pipe Name: Pipe Type: Regular

Pipe Description:

**Source**

Data Source: TRAN\_ALMA\_DS  
Harvesting method: FTP  
Username: Password: Source directory:  Delete after copy  
Start harvesting fresh records from: Dec 18, 2016  
Start time: 20:57:24

**Normalization and Enrichment**

Normalization Mapping Set: Alma MARC - Template  
Encoded Set: Alma MARC - Template  
Harvest File Format: tar.gz  Force DEDUP  
System Last Copy: PRBR  Force FPCR  
Configure Server Locals:

**Errors**

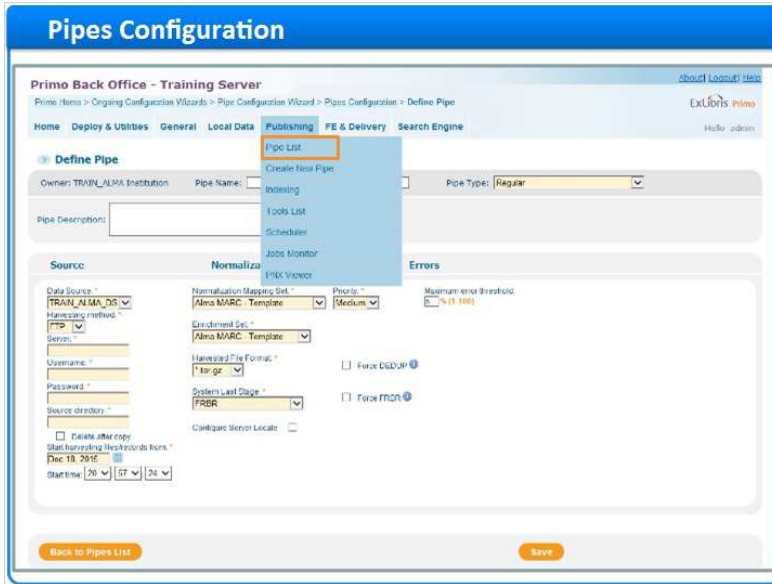
Priority: Medium  
Maximum error threshold: 5% (1-100)

Back to Pipes List Save

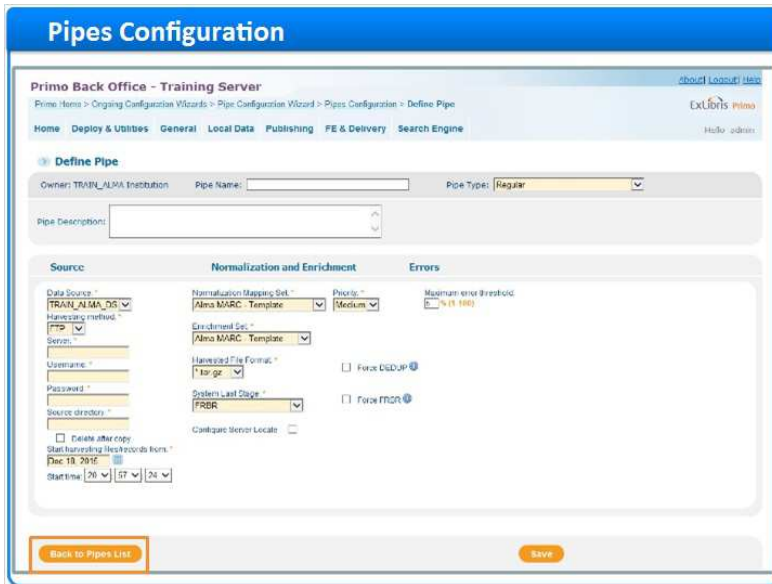
Publishing

- Pipe List
- Create New Pipe
- Indexing
- Tools List
- Schedules
- Job Monitor
- Pipe Viewer

## Top nav - pipe list (Slide Layer)



## Back to pipes list (Slide Layer)



## 1.11 Adding a Pipe

The screenshot shows the 'Adding a Regular Pipe' configuration page in the Primo Back Office. The page title is 'Adding a Regular Pipe' and the breadcrumb is 'Primo Back Office - Training Server > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe'. The page is divided into three main sections: 'Source', 'Normalization and Enrichment', and 'Errors'. In the 'Source' section, 'Data Source' is set to 'TRAINALMA\_DS', 'Harvesting method' is 'FTP', and 'Server' is empty. In the 'Normalization and Enrichment' section, 'Normalization Mapping Set' and 'Enrichment Set' are both set to 'Alma MARC - Template'. In the 'Errors' section, 'Priority' is 'Medium' and 'Maximum error threshold' is '5%'. There are also checkboxes for 'Force DEDUP' and 'Force MD5'. At the bottom, there are 'Back to Pipes List' and 'Save' buttons.

### Notes:

First, we want to determine the type of pipe we want to create, then name it.

There are several different types of pipes, and the configuration for each pipe differs depending on which type we are setting up. Today we will create a regular pipe, so the pipe will be named TRAINALMA\_Regular, and the pipe type will be set to Regular. If we wanted to enter a description, we could do so here.

**Regular pipes** are used to load data from the data source, whether it's the full data set or ongoing updates to the data.

To configure a regular pipe, we select the data source, which in our case is TRAINALMA\_DS and the normalization mapping set, ALMA MARC Template.

We can leave the priority set to medium, and the maximum error threshold set to 5%.

The enrichment set can be selected based on the source system. If we did not see our source system, we could select 'No Enrichments', but in our case we can select Alma MARC - template.

Next, we select the harvesting method. We can use FTP or SFTP if we need to access a different server to pick up the extracted files. Notice that I'm also prompted to fill in the server name, credentials, and source directory with these selections. If I was harvesting data using OAI, I would select this method, and note that the parameters change to server, metadata format, and set. If I am putting the extracted files onto the Primo server, I would use the Copy harvesting method, and would fill in the directory where the files were being placed. Since the Alma data is being transferred to the Primo server after it's extracted, I'm going to use this method, and fill in the directory.

Next I can choose whether or not to delete the records after they've been harvested - I am going to leave this unchecked for now.

The first time you run a regular pipe, you are most likely loading the full data set. You will want to set the date here to a date prior to when those data files were extracted. Once the pipe is run, this date will automatically adjust to ensure that the next time the pipe runs it will be only picking up new data, and not picking up all of the files in the directory.

The harvested file format will always be some form of compressed file, whether it is a tar.gz, warc, or zip. Our Alma data is in tar.gz format, so I will keep that selected.

The system last stage allows us to set the last stage of the publishing process. I am going to keep this set to FRBR. Please visit Ex Libris' Knowledge Center If you are interested in more information regarding this setting, or the Force DEDUP and FRBR settings.

Before we click save, let's see the other types of pipes that are possible.

## Pipe Type (Slide Layer)

The screenshot shows the 'Adding a Regular Pipe' configuration page in the Primo Back Office. The page is titled 'Adding a Regular Pipe' and is part of the 'Primo Back Office - Training Server' interface. The breadcrumb trail is 'Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe'. The page has a navigation menu with 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. The 'Define Pipe' section is active, showing the following configuration options:

- Owner:** TRAIN\_ALMA\_Institution
- Pipe Name:** TRAIN\_ALMA\_Regular
- Pipe Type:** Regular (highlighted with an orange box)
- Pipe Description:** (empty text area)
- Source:**
  - Data Source:** TRAIN\_ALMA\_DB
  - Harvesting Method:** FTP
  - Server:** (empty text field)
  - Username:** (empty text field)
  - Password:** (empty text field)
  - Source directory:** (empty text field)
  - Delete after copy
  - Start harvesting fresh records from: Dec 18, 2016
  - Start time:** 20:57:24
- Normalization and Enrichment:**
  - Normalization Mapping Set:** Alma MARC - Template
  - Enrichment Set:** Alma MARC - Template
  - Harvested File Format:** tar.gz
  - System Last Stage:** FRBR
  - Configure Server Locals
- Errors:**
  - Priority:** Medium
  - Maximum error threshold:** 2% (10)
  - Force DEDUP
  - Force FRBR

At the bottom of the page, there are two buttons: 'Back to Pipes List' and 'Save'.

## Pipe Name (Slide Layer)

**Adding a Regular Pipe**

Primo Back Office - Training Server

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

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Huber admin

**Define Pipe**

Owner: TRAN\_ALMA Institution Pipe Name: **TRANALMA.Regular** Pipe Type: Regular

Pipe Description:

**Source** **Normalization and Enrichment** **Errors**

Data Source: TRAN\_ALMA\_DS  
Harvesting method: FTP  
Server:  
Username:  
Password:  
Source directory:  
 Delete after copy  
Start harvesting fresh records from: Dec 18, 2016  
Start time: 20:57:24

Normalization Mapping Set: Alma MARC Template  
Priority: Medium  
Maximum error threshold: 5% (1:100)

Encriment Set: Alma MARC Template  
Harvest File Format: tar.gz  
System Last Copy: PRBR  
 Force DEDUP  
 Force FROD  
Configure Server Locals:

Back to Pipes List Save

## Pipe Description (Slide Layer)

**Adding a Regular Pipe**

Primo Back Office - Training Server

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

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Huber admin

**Define Pipe**

Owner: TRAN\_ALMA Institution Pipe Name: TRANALMA.Regular Pipe Type: Regular

Pipe Description:

**Source** **Normalization and Enrichment** **Errors**

Data Source: TRAN\_ALMA\_DS  
Harvesting method: FTP  
Server:  
Username:  
Password:  
Source directory:  
 Delete after copy  
Start harvesting fresh records from: Dec 18, 2016  
Start time: 20:57:24

Normalization Mapping Set: Alma MARC Template  
Priority: Medium  
Maximum error threshold: 5% (1:100)

Encriment Set: Alma MARC Template  
Harvest File Format: tar.gz  
System Last Copy: PRBR  
 Force DEDUP  
 Force FROD  
Configure Server Locals:

Back to Pipes List Save

## Data Source (Slide Layer)

**Adding a Regular Pipe**

Primo Back Office - Training Server

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

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**Define Pipe**

Owner: TRAN\_ALMA Institution Pipe Name: TRANALMA.Regular Pipe Type: Regular

Pipe Description:

**Source**

Data Source: **TRAN\_ALMA\_DS**

Harvesting method: FTP

Server:

Username:

Password:

Source directory:

Delete after copy

Start harvesting fresh records from: Dec 18, 2016

Start time: 20:57:24

**Normalization and Enrichment**

Normalization Mapping Set: **Alma MARC Template**

Discovered Set: Alma MARC Template

Harvest File Format: tar.gz

System Last Copy: PRBR

Configure Server Locals

**Errors**

Priority: Medium

Maximum error threshold: 100%

Force DDDP

Force PDR

Back to Pipes List Save

## Normalization mapping set (Slide Layer)

**Adding a Regular Pipe**

Primo Back Office - Training Server

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

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**Define Pipe**

Owner: TRAN\_ALMA Institution Pipe Name: TRANALMA.Regular Pipe Type: Regular

Pipe Description:

**Source**

Data Source: TRAN\_ALMA\_DS

Harvesting method: FTP

Server:

Username:

Password:

Source directory:

Delete after copy

Start harvesting fresh records from: Dec 18, 2016

Start time: 20:57:24

**Normalization and Enrichment**

Normalization Mapping Set: **Alma MARC Template**

Discovered Set: Alma MARC Template

Harvest File Format: tar.gz

System Last Copy: PRBR

Configure Server Locals

**Errors**

Priority: Medium

Maximum error threshold: 100%

Force DDDP

Force PDR

Back to Pipes List Save



## Enrichment set (Slide Layer)

**Adding a Regular Pipe**

Primo Back Office - Training Server

Prime Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

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Define Pipe

Owner: TRAN\_ALMA Institution Pipe Name: TRANALMA.Regular Pipe Type: Regular

Pipe Description:

Source	Normalization and Enrichment	Errors
Data Source: TRAN_ALMA_DS Harvesting method: FTP Server: Username: Password: Source directory: <input type="checkbox"/> Delete after copy Start harvesting fresh records from: Dec 18, 2016 Start time: 20:57:24	Normalization Mapping Set: Alma MARC Template Enrichment Set: Alma MARC Template Harvesting File Format: tar.gz System Last Copy: PRBR Configure Server Locals: <input type="checkbox"/>	Priority: Medium Maximum error threshold: 5% (1:100) <input type="checkbox"/> Force DEDUP <input type="checkbox"/> Force FPCR

Back to Pipes List Save

## Harvesting method FTP (Slide Layer)

**Adding a Regular Pipe**

Primo Back Office - Training Server

Prime Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

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Define Pipe

Owner: TRAN\_ALMA Institution Pipe Name: TRANALMA.Regular Pipe Type: Regular

Pipe Description:

Source	Normalization and Enrichment	Errors
Data Source: TRAN_ALMA_DS Harvesting method: FTP Server: Username: Password: Source directory: <input type="checkbox"/> Delete after copy Start harvesting fresh records from: Dec 18, 2016 Start time: 20:57:24	Normalization Mapping Set: Alma MARC Template Enrichment Set: Alma MARC Template Harvesting File Format: tar.gz System Last Copy: PRBR Configure Server Locals: <input type="checkbox"/>	Priority: Medium Maximum error threshold: 5% (1:100) <input type="checkbox"/> Force DEDUP <input type="checkbox"/> Force FPCR

Back to Pipes List Save

## Harvesting method OAI (Slide Layer)

The screenshot shows the 'Adding a Regular Pipe' configuration page in the Primo Back Office. The page title is 'Adding a Regular Pipe'. The breadcrumb trail is 'Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe'. The page is titled 'Primo Back Office - Training Server' and includes navigation links for 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. The user is identified as 'Hudson Admin'.

The 'Define Pipe' section shows the following configuration:

- Owner: TRAIN\_ALMA Institution
- Pipe Name: TRAINALMA\_Regular
- Pipe Type: Regular
- Pipe Description: (empty)

The configuration is divided into three main sections:

- Source:** Data Source: TRAIN\_ALMA\_DS; Harvesting Method: OAI; Source: (empty); Metadata Format: (empty); Sift: (empty); Start time: Dec 16, 2015; Start time: 20:57:28.
- Normalization and Enrichment:** Normalization Mapping Set: Alma MARC - Template; Priority: Medium; Maximum error threshold: 5% (100); Harvested File Format: (empty); Force DEDUP: (unchecked); Force FRDR: (unchecked); System: add meta: (empty); FRBR: (checked).
- Errors:** (empty)

Buttons at the bottom include 'Back to Pipes List' and 'Save'.

## Harvesting method Copy (Slide Layer)

The screenshot shows the 'Adding a Regular Pipe' configuration page in the Primo Back Office. The page title is 'Adding a Regular Pipe'. The breadcrumb trail is 'Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe'. The page is titled 'Primo Back Office - Training Server' and includes navigation links for 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. The user is identified as 'Hudson Admin'.

The 'Define Pipe' section shows the following configuration:

- Owner: TRAIN\_ALMA Institution
- Pipe Name: TRAINALMA\_Regular
- Pipe Type: Regular
- Pipe Description: (empty)

The configuration is divided into three main sections:

- Source:** Data Source: TRAIN\_ALMA\_DS; Harvesting Method: Copy; Source: (empty); Source: (empty); Source: (empty); Start time: Dec 16, 2015; Start time: 20:07:24.
- Normalization and Enrichment:** Normalization Mapping Set: Alma MARC - Template; Priority: Medium; Maximum error threshold: 5% (100); Enrichment Set: Alma MARC - Template; Harvested File Format: (empty); Force DEDUP: (unchecked); Force FRDR: (unchecked); System: Last Page: (empty); FRBR: (checked).
- Errors:** (empty)

Buttons at the bottom include 'Back to Pipes List' and 'Save'.

## Harvesting method filled in (Slide Layer)

**Adding a Regular Pipe**

Primo Back Office - Training Server

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

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Huber admin

**Define Pipe**

Owner: TRAN\_ALMA Institution Pipe Name: TRANALMA\_Regular Pipe Type: Regular

Pipe Description:

**Source** **Normalization and Enrichment** **Errors**

Data Source: TRAN\_ALMA\_DS  
Harvesting method: **Harvesting method**  
Source direction: **Source direction**  
MaxBr/MaxAlma: **MaxBr/MaxAlma**  
Start harvesting after records from: Dec 16, 2015  
System Last Stage: **System Last Stage**  
Batch size: 20 27 24

Normalization Mapping Set: Alma MARC - Template Priority: Medium MaxItems per Threshold: 5 (11 100)

Enrichment Set: Alma MARC - Template

Harvested File Format: **Harvested File Format**  
Format: **Format**  
Force DEDUP:  Force FRDR:

Back to Pipes List Save

## Delete records (Slide Layer)

**Adding a Regular Pipe**

Primo Back Office - Training Server

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

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Huber admin

**Define Pipe**

Owner: TRAN\_ALMA Institution Pipe Name: TRANALMA\_Regular Pipe Type: Regular

Pipe Description:

**Source** **Normalization and Enrichment** **Errors**

Data Source: TRAN\_ALMA\_DS  
Harvesting method: **Harvesting method**  
Source direction: **Source direction**  
MaxBr/MaxAlma: **MaxBr/MaxAlma**  
Start harvesting after records from: Dec 16, 2015  
System Last Stage: **System Last Stage**  
Batch size: 20 27 24

Normalization Mapping Set: Alma MARC - Template Priority: Medium MaxItems per Threshold: 5 (11 100)

Enrichment Set: Alma MARC - Template

Harvested File Format: **Harvested File Format**  
Format: **Format**  
Force DEDUP:  Force FRDR:

Back to Pipes List Save

## Date (Slide Layer)

**Adding a Regular Pipe**

Primo Back Office - Training Server

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

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Huber admin

**Define Pipe**

Owner: TRAN\_ALMA Institution Pipe Name: TRANALMA.Regular Pipe Type: Regular

Pipe Description:

**Source** **Normalization and Enrichment** **Errors**

Data Source: TRAN\_ALMA\_DS1  
Harvesting method: Copy  
Source directory: /xbr/br/ata/alma  
Start harvesting from records from: Dec 16, 2015  
System Last Stage: 20 07 24

Normalization Mapping Set: Alma MARC Template  
Priority: Medium  
Maximum error threshold: 5 (11 100)

Enrichment Set: Alma MARC Template  
Harvested File Format: tar.gz  
Force DEDUP:   
Force FRDR:

Back to Pipes List Save

## Format (Slide Layer)

**Adding a Regular Pipe**

Primo Back Office - Training Server

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

about Logout Help

EXLIBRIS primo

Huber admin

**Define Pipe**

Owner: TRAN\_ALMA Institution Pipe Name: TRANALMA.Regular Pipe Type: Regular

Pipe Description:

**Source** **Normalization and Enrichment** **Errors**

Data Source: TRAN\_ALMA\_DS1  
Harvesting method: Copy  
Source directory: /xbr/br/ata/alma  
Start harvesting from records from: Dec 16, 2015  
System Last Stage: 20 07 24

Normalization Mapping Set: Alma MARC Template  
Priority: Medium  
Maximum error threshold: 5 (11 100)

Enrichment Set: Alma MARC Template  
Harvested File Format: tar.gz  
Force DEDUP:   
Force FRDR:

Back to Pipes List Save

## System last stage (Slide Layer)

**Adding a Regular Pipe**

Primo Back Office - Training Server

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

about Logout Help

ExLibris primo

Huber admin

**Define Pipe**

Owner: TRAN\_ALMA Institution Pipe Name: TRANALMA.Regular Pipe Type: Regular

Pipe Description:

**Source** **Normalization and Enrichment** **Errors**

Data Source: TRAN\_ALMA\_DS1  
Harvesting method: Copy  
Source directory: /xbr/AlmaData  
 Disables when copy  
Start harvesting from records from: Dec 16, 2015  
Batch size: 20 17 24

Normalization Mapping Set: Alma MARC Template Priority: Medium Members over threshold: 5 (11 100)

Enrichment Set: Alma MARC Template

Harvested File Format: Target: XML

System Last Stage: **FRBR**

Force DEDUP  
 Force FRBR

Back to Pipes List Save

## Last stage and force (Slide Layer)

**Adding a Regular Pipe**

Primo Back Office - Training Server

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

about Logout Help

ExLibris primo

Huber admin

**Define Pipe**

Owner: TRAN\_ALMA Institution Pipe Name: TRANALMA.Regular Pipe Type: Regular

Pipe Description:

**Source** **Normalization and Enrichment** **Errors**

Data Source: TRAN\_ALMA\_DS1  
Harvesting method: Copy  
Source directory: /xbr/AlmaData  
 Disables when copy  
Start harvesting from records from: Dec 16, 2015  
Batch size: 20 17 24

Normalization Mapping Set: Alma MARC Template Priority: Medium Members over threshold: 5 (11 100)

Enrichment Set: Alma MARC Template

Harvested File Format: Target: XML

System Last Stage: FRBR

Force DEDUP  
 Force FRBR

Back to Pipes List Save

## 1.12 Pipe Types

The screenshot shows the 'Define Pipe' configuration page in the Primo Back Office. The page title is 'Pipe Types'. The breadcrumb trail is 'Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe'. The page has a navigation menu with 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. The 'Define Pipe' section includes a 'Pipe Name' field with 'TUANALMA.Regular', a 'Pipe Type' dropdown set to 'Regular', and a 'Pipe Description' field. Below this are three tabs: 'Source', 'Normalization and Enrichment', and 'Errors'. The 'Source' tab is active, showing 'Data Source' as 'PRIMO\_ALMA\_DS', 'Source Directory' as 'Primo/Alma', and 'Start Harvesting' set to 'Dec 16, 2015'. The 'Normalization and Enrichment' tab shows 'Normalization Mapping Set' as 'Alma MARC - Templates', 'Enrichment Set' as 'Alma MARC - Templates', and 'Harvested File Format' as '\*.tar.gz'. The 'Errors' tab shows 'Maximum error threshold' as '1000000'. At the bottom, there are 'Back to Pipes List' and 'Save' buttons.

### Notes:

While **Regular pipes** are used to load data from the data source, **No Harvesting - Update Data Source** pipes are used when updates have been made to the normalization rules and we want to apply those updates to the data. Since this pipe does not harvest the data from the source, you'll note that when I have this type selected, I do not see the harvesting options, and only need to select the appropriate data source, normalization mapping set, and system last stage.

**Delete Data Source** does just that - it deletes any data associated with that data source. Notice that I only need to determine the data source for this type of pipe.

**Delete Data Source and Reload** deletes the data associated with the data source first, then reloads the data from the source system. Because of this, we have the harvesting options, and would need to ensure we set the date to include all of the files at the pickup site.

Now that we've seen each of the pipe types, let's go back to the Regular pipe. Notice that my original parameters are still selected, so I can click save, and be brought back to the pipes list.

## No harvest pipe (Slide Layer)

The screenshot shows the 'Pipe Types' configuration page in the Primo Back Office. The page title is 'Pipe Types' and the breadcrumb trail is 'Primo Back Office - Training Server > Orgaing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe'. The page includes a navigation menu with 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. The 'Define Pipe' section is active, showing the 'Owner' as 'TRAIN\_ALMA Institution' and the 'Pipe Name' as 'TRAIN\_ALMA\_Regular'. The 'Pipe Type' is set to 'No harvest pipe - Update Data Source'. The 'Pipe Description' field is empty. The 'Source' section is highlighted with a red box and contains the following configuration: 'Data Source' is 'TRAIN\_ALMA\_DS', 'Normalization and Enrichment' is 'Normalisation Mapping Eng.', 'Priority' is 'Medium', and 'Maximum error threshold' is '11.5000'. The 'Enrichment Set' is 'Alma MVRG Template' and the 'Stream Last Stage' is 'FRDR'. There are checkboxes for 'Force DEDUP' and 'Force FRDR', both of which are unchecked. At the bottom of the page, there are two buttons: 'Back to Pipes List' and 'Save'.

## Delete Data Source Pipe (Slide Layer)

The screenshot shows the 'Pipe Types' configuration page in the Primo Back Office. The page title is 'Pipe Types' and the breadcrumb trail is 'Primo Back Office - Training Server > Orgaing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe'. The page includes a navigation menu with 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. The 'Define Pipe' section is active, showing the 'Owner' as 'TRAIN\_ALMA Institution' and the 'Pipe Name' as 'TRAIN\_ALMA\_Regular'. The 'Pipe Type' is set to 'Delete Data Source'. The 'Pipe Description' field is empty. The 'Source' section is highlighted with a red box and contains the following configuration: 'Data Source' is 'TRAIN\_ALMA\_DS' and 'Priority' is 'Medium'. There are checkboxes for 'Force DEDUP' and 'Force FRDR', both of which are unchecked. At the bottom of the page, there are two buttons: 'Back to Pipes List' and 'Save'.

## Delete Reload Pipe (Slide Layer)

The screenshot shows the 'Define Pipe' configuration page in the Primo Back Office. The page title is 'Primo Back Office - Training Server'. The breadcrumb trail is 'Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe'. The navigation menu includes 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. The user is logged in as 'Hudo admin'.

The 'Define Pipe' section shows the following configuration:

- Owner: TRAN\_ALMA Institution
- Pipe Name: TRANALMA.Regular
- Pipe Type: Delete Data Source and Reload
- Pipe Description: (empty)

The configuration is divided into three main sections:

- Source:** Data Source: TRAN\_ALMA\_DS; Harvesting method: Copy; Source directory: /pub/driv/data/alma; Harvest after copy: ; Start harvesting fresh records from: Dec 18, 2016; Start time: 20:57:24.
- Normalization and Enrichment:** Normalization Mapping Set: Alma MARC - Template; Enrichment Set: Alma MARC - Template; Harvest File Format: tar.gz; System Last Change: FRBR.
- Errors:** Priority: Medium; Maximum error threshold: 5% (100); Force DEDUP: ; Force FRBR: .

Buttons at the bottom include 'Back to Pipes List' and 'Save'.

## Regular Pipe (Slide Layer)

The screenshot shows the 'Define Pipe' configuration page in the Primo Back Office. The page title is 'Primo Back Office - Training Server'. The breadcrumb trail is 'Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe'. The navigation menu includes 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. The user is logged in as 'Hudo admin'.

The 'Define Pipe' section shows the following configuration:

- Owner: TRAN\_ALMA Institution
- Pipe Name: TRANALMA.Regular
- Pipe Type: Regular
- Pipe Description: (empty)

The configuration is divided into three main sections:

- Source:** Data Source: TRAN\_ALMA\_DS; Harvesting method: Copy; Source directory: /pub/driv/data/alma; Harvest after copy: ; Start harvesting fresh records from: Dec 18, 2016; Start time: 20:57:24.
- Normalization and Enrichment:** Normalization Mapping Set: Alma MARC - Template; Enrichment Set: Alma MARC - Template; Harvest File Format: tar.gz; System Last Change: FRBR.
- Errors:** Priority: Medium; Maximum error threshold: 5% (100); Force DEDUP: ; Force FRBR: .

Buttons at the bottom include 'Back to Pipes List' and 'Save'.

## Save (Slide Layer)

**Primo Back Office - Training Server**

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Pipes Configuration > Define Pipe

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Define Pipe**

Owner: TRAIN\_ALMA Institution Pipe Name: TRAIN\_ALMA\_Regular Pipe Type: Regular

Pipe Description:

**Source**

Data Source: TRAIN\_ALMA\_DS  
Harvesting method: Copy  
Source directory: /xolibs/data/alma  
 Displays when copy  
Start harvesting: 01/01/2015  
Schedule: 20 07 24

**Normalization and Enrichment**

Normalization Mapping Set: Alma MARC Templates Priority: Medium  
Enrichment Set: Alma MARC Templates  
Harvested File Format: Change  
System Last Stage: PFER

**Errors**

Maximum error threshold: 5 / 11 100  
 Force DEDUP  
 Force PDR

Back to Pipes List Save

## Pipes List (Slide Layer)

**Primo Back Office - Training Server**

Primo Home > Monitor Primo Status > Pipe Monitoring

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

**Pipes List**

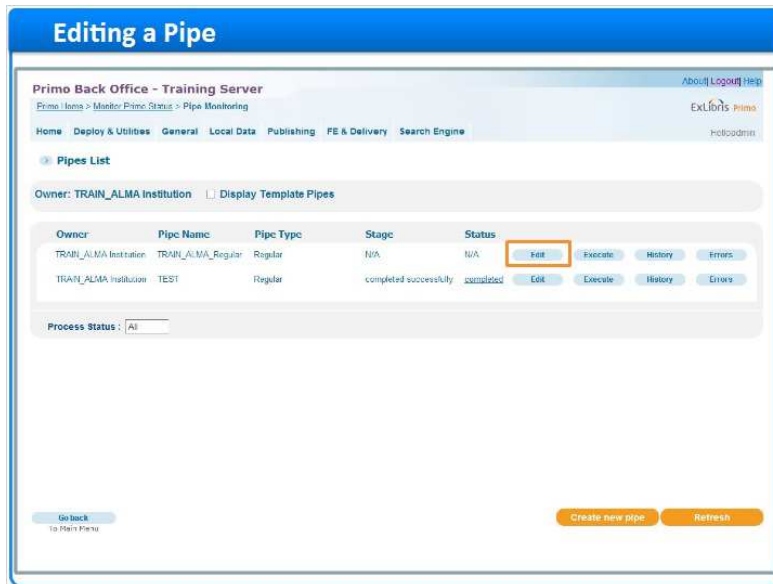
Owner: TRAIN\_ALMA Institution  Display Template Pipes

Owner	Pipe Name	Pipe Type	Stage	Status	
TRAIN_ALMA Institution	TRAIN_ALMA_Regular	Regular	N/A	N/A	Edit Execute History Errors
TRAIN_ALMA Institution	TEST	Regular	completed successfully	completed	Edit Execute History Errors

Process Status: All

Go back To Pipes Menu Create new pipe Refresh

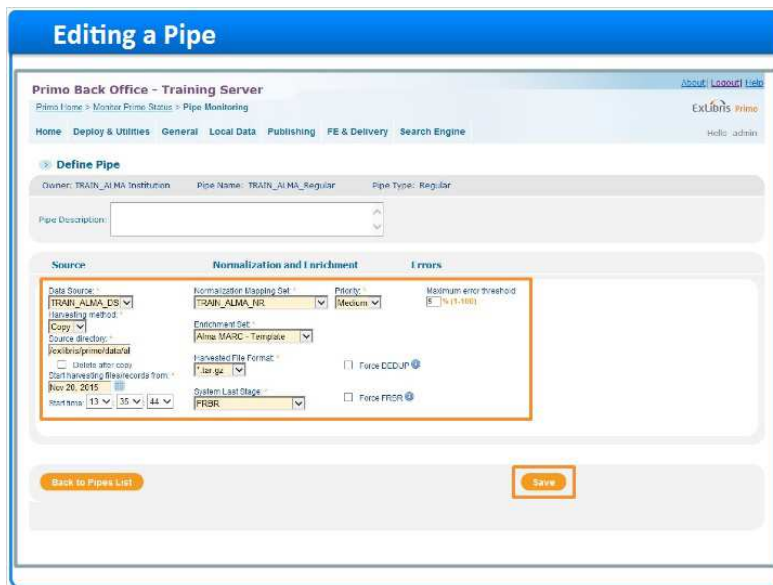
## 1.13 Editing a Pipe



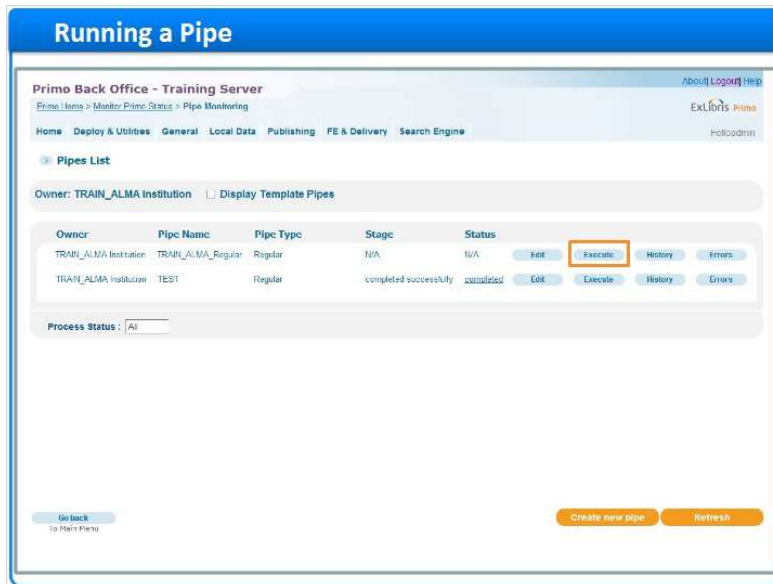
### Notes:

Here in the pipes list, if I want to edit an existing pipe, I can select *Edit*. I won't be able to change the type of the pipe, but I can change any of the other parameters, and click save to apply those changes.

## Define pipe (Slide Layer)



## 1.14 Running a Pipe



### Notes:

From the pipes list, I can run any of the configured pipes. To run a pipe, I click *Execute*.

Once I've executed the pipe, I can see the stage and status here in the pipes list, and I can click on the status for more information.

In the Job Details screen, I have access to various log files, the stage and status information, and I can either terminate or suspend the pipe if needed.

The next few sections down provide details about each stage of the publishing process, including the harvesting stage, the normalization-enrichment-persistence stages, and the DEDUP and FRBR stages. I can click Refresh at the bottom of the page to update the information on the page. When the pipe is finished running, the stage show *completed successfully*, and the status will show *completed*. If the pipe does not finish for some reason, the stage will reflect where the process stopped, and the status will indicate the pipe has stopped.

When a pipe completes successfully, we still need to wait for the indexing and hotswapping processes to run before the records can be seen in the front end.

I can return to the pipe list at any time by clicking *Back to Pipes List*.

## Stage and status (Slide Layer)

The screenshot shows the 'Running a Pipe' interface. At the top, there is a navigation bar with 'Primo Back Office - Training Server' and 'About Logout Help'. Below this, there are tabs for 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. The main content area is titled 'Pipes List' and shows a table of pipes. The table has columns for 'Owner', 'Pipe Name', 'Pipe Type', 'Stage', and 'Status'. The 'Stage' and 'Status' columns are highlighted with orange boxes. The first row shows a pipe with 'Stage: pending for harvest' and 'Status: not started'. The second row shows a pipe with 'Stage: completed successfully' and 'Status: completed'. Below the table, there is a 'Process Status' dropdown menu set to 'All'. At the bottom, there are buttons for 'Go back to Main Menu', 'Create new pipe', and 'Refresh'.

Owner	Pipe Name	Pipe Type	Stage	Status
TRAIN_ALMA Institution	TRAIN_ALMA_Regular	Regular	pending for harvest	not started
TRAIN_ALMA Institution	TEST	Regular	completed successfully	completed

## Job details screen (Slide Layer)

The screenshot shows the 'Job details' screen for a specific pipe job. The title is 'Job details' and the job ID is '2015-11-20-17-33-11-18912025'. The job name is 'TRAIN\_ALMA\_Regular' and the job type is 'Regular'. The job status is 'running'. The start time is '11/20/15 17:33:19' and the end time is '11/20/15 17:35:43'. The job details are summarized in a table below. The 'Normal' section shows 424 Normal Records, 1 Deleted Record, 154 Num Inserts, 0 Num Updates, 0 Failed Files, and 0 Empty Files. The 'NEP' section shows 924 Succeeded Records and 0 Failed Records. The 'Terminate' and 'Suspend' buttons are highlighted with orange boxes.

Category	Item	Value
Normal	Files Copied:	0
	Failed Records:	0
	Normal Records:	424
	Deleted Records:	0
	Normal Bulks:	1
	Deleted Bulks:	1
NEP	Num Inserts:	154
	Num Updates:	0
	Num Duplications:	0
	Failed Files:	0
Empty Files:	0	

## Harvesting stage (Slide Layer)

### Running a Pipe

<b>Harvest</b>	
Files Copied: 8	Failed Records: 0
Normal Records: 474	Deleted Records: 70
Normal Bulks: 1	Deleted Bulks: 1
Num Inserts: 154	Num Updates: 300 Num Duplications: 0
Failed Files: 0	Empty Files: 0
Start time: 11/20/15 17:33:19	End time: 11/20/15 17:33:30

<b>NEP</b>	
Succeeded Records: 424	Failed Records: 0
Start time: 11/20/15 17:33:49	End time: 11/20/15 17:33:38

<b>Dodup</b>	
Single: 433	Member: 55 Failed Records: 0
Merge: 30	Vectors: 199
Start time: 11/20/15 17:35:38	End time: 11/20/15 17:35:43

<b>TMM</b>	
Single: 430	Member: 15 Failed Records: 0
Keys: 180	
Start time: 11/20/15 17:35:43	End time: 11/20/15 17:35:44

[Back to Pipe List](#) [Refresh](#)

## NEP stage (Slide Layer)

### Running a Pipe

<b>Harvest</b>	
Files Copied: 8	Failed Records: 0
Normal Records: 474	Deleted Records: 70
Normal Bulks: 1	Deleted Bulks: 1
Num Inserts: 154	Num Updates: 300 Num Duplications: 0
Failed Files: 0	Empty Files: 0
Start time: 11/20/15 17:33:19	End time: 11/20/15 17:33:30

<b>NEP</b>	
Succeeded Records: 424	Failed Records: 0
Start time: 11/20/15 17:33:49	End time: 11/20/15 17:33:38

<b>Dodup</b>	
Single: 433	Member: 55 Failed Records: 0
Merge: 30	Vectors: 199
Start time: 11/20/15 17:35:38	End time: 11/20/15 17:35:43

<b>TMM</b>	
Single: 430	Member: 15 Failed Records: 0
Keys: 180	
Start time: 11/20/15 17:35:43	End time: 11/20/15 17:35:44

[Back to Pipe List](#) [Refresh](#)

## Dedup and FRBR stage (Slide Layer)

### Running a Pipe

**Harvest**

Files Copied: 8	Failed Records: 0
Normal Records: 474	Deleted Records: 70
Normal Bulks: 1	Deleted Bulks: 1
Num Inserts: 154	Num Updates: 300 Num Duplications: 0
Failed Files: 0	Empty Files: 0
Start time: 11/20/15 17:33:19	End time: 11/20/15 17:33:30

**NEP**

Succeeded Records: 424	Failed Records: 0
Start time: 11/20/15 17:33:49	End time: 11/20/15 17:33:38

**Dedup**

Single: 433	Member: 55 Failed Records: 0
Merge: 30	Vectors: 199
Start time: 11/20/15 17:35:38	End time: 11/20/15 17:35:43

**FRBR**

Single: 430	Member: 15 Failed Records: 0
Keys: 180	
Start time: 11/20/15 17:35:43	End time: 11/20/15 17:35:44

[Back to Pipe List](#) [Refresh](#)

## Refresh (Slide Layer)

### Running a Pipe

**Harvest**

Files Copied: 8	Failed Records: 0
Normal Records: 474	Deleted Records: 70
Normal Bulks: 1	Deleted Bulks: 1
Num Inserts: 154	Num Updates: 300 Num Duplications: 0
Failed Files: 0	Empty Files: 0
Start time: 11/20/15 17:33:19	End time: 11/20/15 17:33:30

**NEP**

Succeeded Records: 424	Failed Records: 0
Start time: 11/20/15 17:33:49	End time: 11/20/15 17:33:38

**Dedup**

Single: 433	Member: 55 Failed Records: 0
Merge: 30	Vectors: 199
Start time: 11/20/15 17:35:38	End time: 11/20/15 17:35:43

**FRBR**

Single: 430	Member: 15 Failed Records: 0
Keys: 180	
Start time: 11/20/15 17:35:43	End time: 11/20/15 17:35:44

[Back to Pipe List](#) [Refresh](#)

## Completed status (Slide Layer)

**Running a Pipe**

Primo Back Office - Training Server [About](#) [Logout](#) [Help](#)

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#) [ExLibris Primo](#)

Hello admin

**Job details**

Job Details for 2015.11.20.17.33.11-18912025

**TRAIN\_ALMA\_Regular** [Load/Save](#)

[View Log](#) [View Normal Log](#) [View Duplicate Log](#) [View PRR Log](#)

Job ID: 2015.11.20-17.33.11-18912025

**Stage:** completed **Status:** completed

Start Time: 11/20/15 17:33:19 End Time: 11/20/15 17:33:43

**Harvard**

Files Copied: 0	Failed Records: 0
Normal Records: 424	Deleted Records: 0
Normal Bulks: 1	Deleted Bulks: 1
Num Inserts: 154	Num Updates: 300 Num Duplications: 0
Failed Files: 0	Empty Files: 0
Start time: 11/20/15 17:33:19	End time: 11/20/15 17:33:30

**NEP**

Succeeded Records: 424	Failed Records: 0
Start time: 11/20/15 17:33:49	End time: 11/20/15 17:33:38

[Back to Pipe List](#) [Refresh](#)

## Back to pipes list (Slide Layer)

**Running a Pipe**

Primo Back Office - Training Server [About](#) [Logout](#) [Help](#)

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#) [ExLibris Primo](#)

Hello admin

**Job details**

Job Details for 2015.11.20.17.33.11-18912025

**TRAIN\_ALMA\_Regular** [Load/Save](#)

[View Log](#) [View Normal Log](#) [View Duplicate Log](#) [View PRR Log](#)

Job ID: 2015.11.20-17.33.11-18912025

**Stage:** completed **Status:** completed

Start Time: 11/20/15 17:33:19 End Time: 11/20/15 17:33:43

**Harvard**

Files Copied: 0	Failed Records: 0
Normal Records: 424	Deleted Records: 0
Normal Bulks: 1	Deleted Bulks: 1
Num Inserts: 154	Num Updates: 300 Num Duplications: 0
Failed Files: 0	Empty Files: 0
Start time: 11/20/15 17:33:19	End time: 11/20/15 17:33:30

**NEP**

Succeeded Records: 424	Failed Records: 0
Start time: 11/20/15 17:33:49	End time: 11/20/15 17:33:38

[Back to Pipe List](#) [Refresh](#)

## 1.15 Pipe History

The screenshot displays the 'Pipe History' page in the Primo Back Office. The page title is 'Pipe History' and the breadcrumb trail is 'Primo Home > Monitor Primo Status > Pipe Monitoring'. The page includes a navigation menu with options like 'Home', 'Deploy & Utilities', 'General', 'Local Data', 'Publishing', 'FE & Delivery', and 'Search Engine'. Below the navigation, there is a 'Pipes List' section with a filter for 'Owner: TRAIN\_ALMA Institution' and a checkbox for 'Display Template Pipes'. The main content is a table with the following data:

Owner	Pipe Name	Pipe Type	Stage	Status				
TRAIN_ALMA Institution	TRAIN_ALMA_Regular	Regular	completed successfully	completed	Edit	Execute	History	Errors
TRAIN_ALMA Institution	TEST	Regular	completed successfully	completed	Edit	Execute	History	Errors

At the bottom of the page, there is a 'Process Status' dropdown menu set to 'All', a 'Go back to Main Menu' button, and 'Create new pipe' and 'Refresh' buttons.

### Notes:

From the pipes list, I can see the history of this pipe by clicking *History*.

Each time this pipe was run, the job details are saved in this list. We can see the stages and statuses for each job, as well as the start and end times.

To get back to the job details for any of these pipe runs, I can click on the name in this column.

Records that produced errors can be found here, by clicking on *Errors*, or by clicking on *Errors* in the Pipes List.

## History (Slide Layer)

**Pipe History**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

Job monitor

History for TRAIN\_ALMA\_Regular

Owner: TRAIN\_ALMA\_institution

Owner	Name	Stage	Status	Start Time	End Time	
TRAIN_ALMA_institution	2215.11.20.17.33.11.18910205	completed successfully	completed	11/20/15 17:33:19	11/20/15 17:36:43	Errors

Back to Pipe List Refresh

## Errors in pipe list (Slide Layer)

**Pipe History**

Primo Back Office - Training Server

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

Pipes List

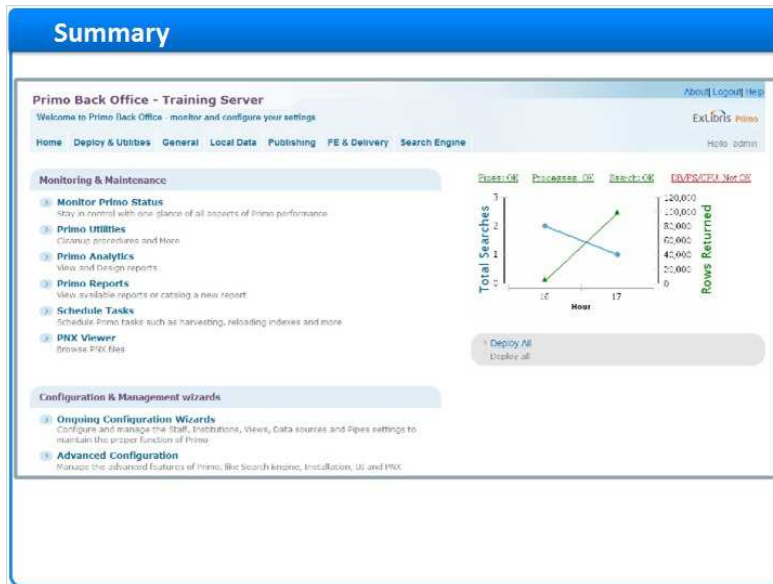
Owner: TRAIN\_ALMA\_institution  Display Template Pipes

Owner	Pipe Name	Pipe Type	Stage	Status					
TRAIN_ALMA_institution	TRAIN_ALMA_Regular	Regular	completed successfully	completed	Edit	Execute	History	Errors	
TRAIN_ALMA_institution	TEST	Regular	completed successfully	completed	Edit	Execute	History	Errors	

Process Status: All

Go back to Pipe's Menu Create new pipe Refresh

## 1.16 Summary



### Notes:

And that is how data is loaded into Primo! By creating a data source, using a normalization mapping set, and configuring a pipe, we can harvest data from your source systems and convert it into PNX records for use in Primo.

## 1.17 Session Review and Quiz

### Agenda



- Data Sources
- Normalization Rules
- Pipes
- **Session Review and Quiz**

### Notes:

Session Review and Quiz

## 1.18 Session Review

### Session Review

**In this session we covered:**

- How to load data using data sources, normalization rules and pipes
- How to monitor the data loading process

**Next Steps:**

- Take the quiz
- Perform the exercises
- Review the recommended articles.
- Continue to the next training session

### Notes:


In this session we covered how to load data into Primo using data sources, normalization rules and pipes, and how to monitor the data loading process. After the brief quiz that begins on the next page, please complete the exercises that are provided in the Knowledge Center where you launched this training. Please refer to the Recommended Articles section for additional information.

After finishing the exercise, you can continue on to the next training session in this series.

### 1.19 Question 1

(Multiple Choice, 10 points, 1 attempt permitted)

**Quiz: Pipes Configuration**

 Please select the correct response. It is possible to configure the following pipe types:

- Regular, No Harvesting-Update Data Source, Delete Data Source, and Delete Data Source and Reload
- Full, Update, Delete, and Delete Reload
- Harvesting, No Harvesting, Deleting, Deleting and Reloading
- Initial load, Update load, Delete
- MARC XML, Dublin Core, PNX

Correct	Choice
X	Regular, No Harvesting-Update Data Source, Delete Data Source, and Delete Data Source and Reload
	Full, Update, Delete, and Delete Reload
	Harvesting, No Harvesting, Deleting, Deleting and Reloading
	Initial load, Update load, Delete
	MARC XML, Dublin Core, PNX

**Feedback when correct:**

---

The pipe types are: Regular, No Harvesting-Update Data Source, Delete Data Source, and Delete Data Source and Reload

**Feedback when incorrect:**

The pipe types are: Regular, No Harvesting-Update Data Source, Delete Data Source, and Delete Data Source and Reload

**Notes:**

**Correct (Slide Layer)**

**Quiz: Pipes Configuration**

?

Please select the correct response. It is possible to configure the following pipe types:


- Regular, No Harvesting-Update Data Source, Delete Data Source, and Delete Data Source and Reload
- Full, Update, Delete, and Delete Reload
- Harvesting, No Harvesting, [
- Initial load, Update load, De
- MARC XML, Dublin Core, PNX

The pipe types are: Regular, No Harvesting-Update Data Source, Delete Data Source, and Delete Data Source and Reload

**Correct** Continue

## Incorrect (Slide Layer)

**Quiz: Pipes Configuration**

 Please select the correct response. It is possible to configure the following pipe types:


- Regular, No Harvesting-Update Data Source, Delete Data Source, and Delete Data Source and Reload
- Full, Update, Delete, and Delete Reload
- Harvesting, No Harvesting, The pipe types are: Regular, No Harvesting-Update Data Source, Delete Data Source, and Delete Data Source and Reload
- Initial load, Update load, De
- MARC XML, Dublin Core, PNX

**Incorrect** Continue

## 1.20 Question 2

*(Multiple Response, 10 points, 1 attempt permitted)*

**Quiz: Pipes Configuration**

 Please select the correct responses. Select all that apply. What steps are needed to load data into Primo?

- Data source created
- Normalization rule in place
- Pipe configured to harvest and load data
- Records need to be in a MARC XML file
- Data must be placed on the Primo server

Correct	Choice
X	Data source created

X	Normalization rule in place
X	Pipe configured to harvest and load data
	Records need to be in a MARC XML file
	Data must be placed on the Primo server

**Feedback when correct:**


In order to load data into Primo, a data source needs to be created, a normalization rule needs to be in place, and a pipe needs to be configured to harvest and load data.

**Feedback when incorrect:**

In order to load data into Primo, a data source needs to be created, a normalization rule needs to be in place, and a pipe needs to be configured to harvest and load data.

**Correct (Slide Layer)**

**Quiz: Pipes Configuration**

 Please select the correct responses. Select all that apply. What steps are needed to load data into Primo?


- Data source created
- Normalization rule in place
- Pipe configured to harvest a
- Records need to be in a MARC XML file
- Data must be placed on the Primo server

In order to load data into Primo, a data source needs to be created, a normalization rule needs to be in place, and a pipe needs to be configured to harvest and load data.

Correct
Continue

## Incorrect (Slide Layer)

**Quiz: Pipes Configuration**

 Please select the correct responses. Select all that apply. What steps are needed to load data into Primo?

- Data source created
- Normalization rule in place
- Pipe configured to harvest a
- Records need to be in a MA
- Data must be placed on the


In order to load data into Primo, a data source needs to be created, a normalization rule needs to be in place, and a pipe needs to be configured to harvest and load data.

**Incorrect** Continue

### 1.21 Question 3

*(True/False, 10 points, 1 attempt permitted)*

**Quiz: Pipes Configuration**

 The History of the pipe shows the job details for each time the pipe was run.

- True
- False

Correct	Choice
X	True

False

**Feedback when correct:**

The History of the pipe shows the job details for each time the pipe was run.

**Feedback when incorrect:**

The History of the pipe shows the job details for each time the pipe was run.


**Notes:**

**Correct (Slide Layer)**

The screenshot shows a quiz interface with a blue header bar containing the text "Quiz: Pipes Configuration". Below the header, there is a question icon (a question mark in a blue circle) followed by the text "The History of the pipe shows the job details for each time the pipe was run." Below the question, there are two radio button options: "True" (which is selected) and "False". To the right of the options, there is a green feedback box containing the text "The History of the pipe shows the job details for each time the pipe was run." At the bottom of the slide, there is a green banner with the word "Correct" in white text, and a "Continue" button to its right.

## Incorrect (Slide Layer)

**Quiz: Pipes Configuration**

 The History of the pipe shows the job details for each time the pipe was run.

True

False

The History of the pipe shows the job details for each time the pipe was run.

**Incorrect** Continue

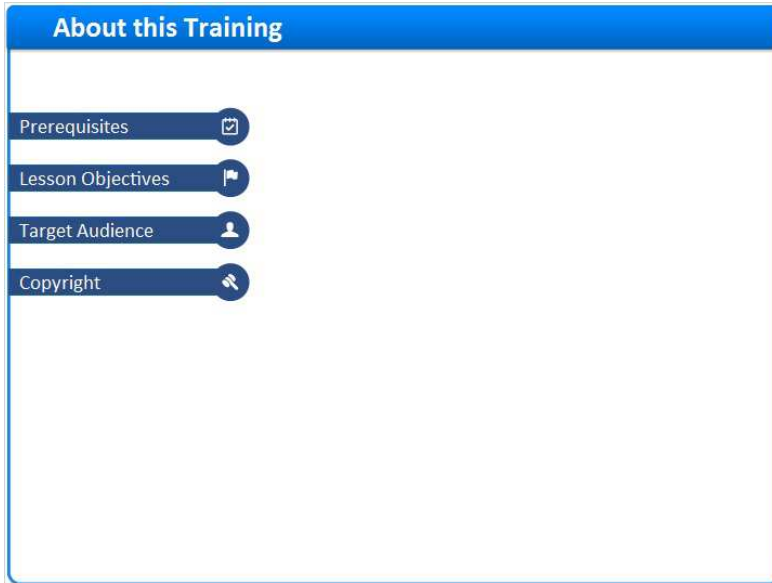
## 1.22 Thank You!



### Notes:

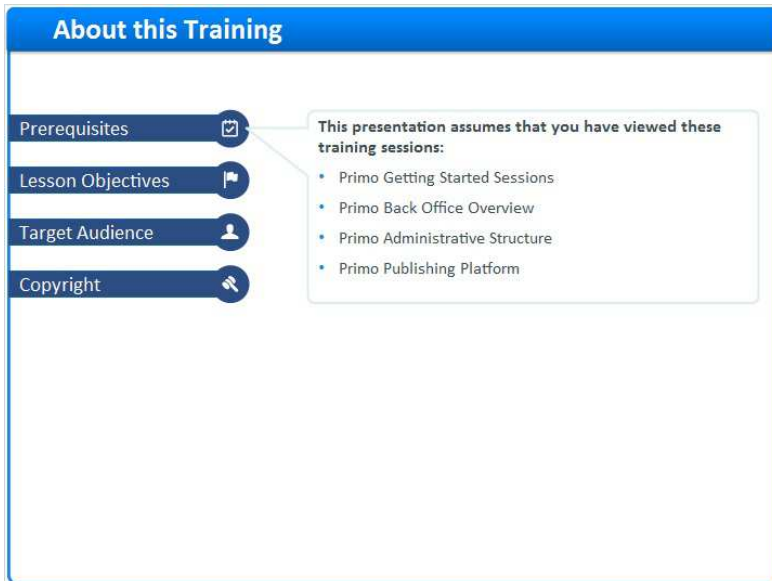
Thank you for joining this session!

## 1.23 About this Training







### Notes:

### 1 (Slide Layer)



## 2 (Slide Layer)

### About this Training





- Prerequisites 
- Lesson Objectives 
- Target Audience 
- Copyright 

**By the end of this training session, you will know:**

- How to load data into Primo
- How to monitor the data loading process

## 3 (Slide Layer)

### About this Training

- Prerequisites 
- Lesson Objectives 
- Target Audience 
- Copyright 

**Target Audience:**

- Staff implementing and maintaining Primo

## 4 (Slide Layer)

### About this Training

- Prerequisites
- Lesson Objectives
- Target Audience
- Copyright

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