Advanced search : updating material types

In Primo Back Office

Ongoing Configuration Wizards

(Note: The following screenshots are of the Sandbox back office but you should make your changes in the Production back office.)

CalState Sandbox Primo Back Office

Welcome to Primo Back Office - monitor and configure your settings

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

Monitoring & Maintenance

> **Monitor Primo Status**
> Stay in control with one glance of all aspects of Primo performance

> **Primo Utilities**
> Cleanup procedures and More

> **Primo Reports**
> View available reports or catalog a new report

> **Schedule Tasks**
> Schedule Primo tasks such as harvesting, reloading indexes and more

> **PNX Viewer**
> Browse PNX files

Configuration & Management wizards

> **Ongoing Configuration Wizards**
> Configure and manage the Staff, Institutions, Views, Data sources and Pipes settings to maintain the proper function of Primo

> **Advanced Configuration**
> Manage the advanced features of Primo, like Search Engine, Installation, UI and PNX

Views Wizard

CalState Sandbox Primo Back Office

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

› Ongoing Configuration Wizards

» Institution Wizard
Manage and configure Institution setting

» Pipe Configuration Wizard
Manage and configure Data Sources and Pipes settings

» Restrictions and Delivery Configuration Wizard
Configure Search Restrictions and Delivery Functionality

» Views Wizard
Manage and configure View settings

» Staff Configuration Wizard
Manage and configure staff settings

» Configure User Groups
Configure user groups for end user restrictions
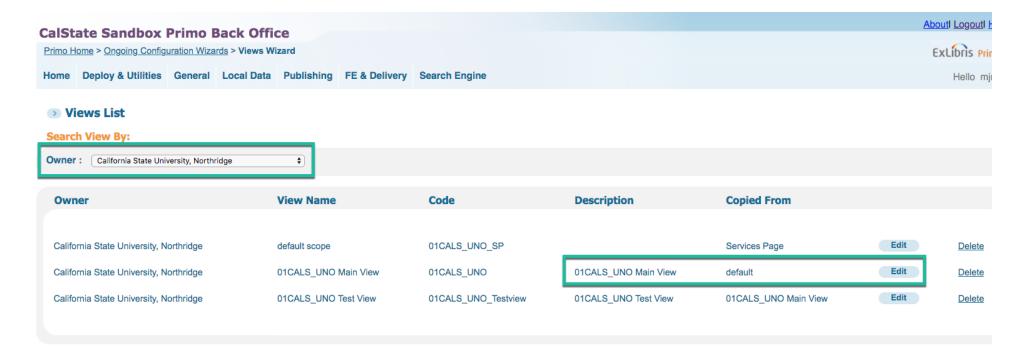
» User Authentication Wizard
Manage and configure authentication settings

» PDS Configuration Wizard
Manage and configure PDS settings

Select a campus and edit its Main View

(In the screenshot below, I chose Cal State Northridge and edited its Main View.)

CalState Sandbox Primo Back Office

Primo Home > Ongoing Configuration Wizards > **Views Wizard**

ExLibris Prim

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

Hello mj

> **Views List**

Search View By:

Owner :   California State University, Northridge ⬍

Owner	View Name	Code	Description	Copied From		
California State University, Northridge	default scope	01CALS_UNO_SP		Services Page	Edit	Delete
California State University, Northridge	01CALS_UNO Main View	01CALS_UNO	01CALS_UNO Main View	default	Edit	Delete
California State University, Northridge	01CALS_UNO Test View	01CALS_UNO_Testview	01CALS_UNO Test View	01CALS_UNO Main View	Edit	Delete

Save & Continue to Scopes List

Continue to View Tabs

Continue to Tile List

CalState Sandbox Primo Back Office

Primo Home > Ongoing Configuration Wizards > Views Wizard

About| Logout| Help

ExLibris Primo

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

Hello mjun

> **Tabs Configuration**

View : 01CALS_UNO

Tabs List for View 01CALS_UNO

No.	Tab Code	Description			
1	everything	CSUN Collections	Edit	Delete	▲ ▼
2	course_reserves	Course Reserves	Edit	Delete	▲ ▼
3	all_libraries	All CSU Libraries	Edit	Delete	▲ ▼

Create a New Tab

Tab Code: [   ]   Description: [   ]   Create

go back
To Scopes List

Continue
To Tile List

Advanced Search, Edit Tile

CalState Sandbox Primo Back Office

Primo Home > Ongoing Configuration Wizards > Views Wizard

ExLibris Primo

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

Hello mjun

▶ Tiles Configuration

View : 01CALS_UNO   Page :   Home Page ▼

All tiles of 01CALS_UNO

Page	Tile	Status	More
Home Page	Basic Search	Configured By Client	Edit Tile
Home Page	Advanced Search	Configured By Client	Edit Tile
Home Page	Main Menu	Configured By Client	Edit Tile
Home Page	Static HTML	Configured By Client	Edit Tile

Go back
To Views List

Continue
To Deploy

Material Type, Edit

CalState Sandbox Primo Back Office

ExLibris Primo

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

Hello mjun

Edit Advanced Search Attributes

View :01CALS_UNO   Tile : Advanced Search

Texts of Advanced Search Tile

Interface Language:: [English ⬍]

Code	English Label
Opening Text	
Ending Text	

Define search pre-filters

Search Type	Search Status	everything	course_reserves	all_libraries			
Complex Search Line 25	User Defined	☑	☐	☑	Edit	Delete	▲▼
Complex Search Line 1	User Defined	☑	☐	☑	Edit	Delete	▲▼
Complex Search Line 21	User Defined	☑	☐	☑	Edit	Delete	▲▼
Publication Date	Default	☑	☐	☑	Edit	Delete	▲▼
Material Type 5	User Defined	☑	☑	☑	Edit	Delete	▲▼
Languages 1	User Defined	☑	☑	☑	Edit	Delete	▲▼
Date Range	Default	☑	☑	☑		Delete	▲▼
Complex Search Line 22	User Defined	☐	☑	☐	Edit	Delete	▲▼
Complex Search Line 23	User Defined	☐	☑	☐	Edit	Delete	▲▼
Complex Search Line 24	User Defined	☐	☑	☐	Edit	Delete	▲▼

Create a new search option	Search Type: [Publication Date ⬍]	Create

Cancel & Go back
To Tiles List

Save & Continue
To Tiles List

OK

calstate-primosb.hosted.exlibrisgroup.com:1443 says

You may have updated some details regarding the search type on
this page. Save these changes before continuing?

Cancel   **OK**

Select the media type/material types you wish to display in Primo's advanced search.

The order of the media/material types in the Back Office is the same as they will appear in Primo's advanced search material type drop-down.

To change the order of the media/material types, use the up and down arrows.
(It's very tedious so save your work periodically by clicking on Save & Continue.)

CalState Sandbox Primo Back Office

ExLibris Primo

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

Hello mjun

▸ Edit Advanced Search Attributes

View :01CALS_UST   Tile : Advanced Search

Interface Language: English ▲▼

Search Target Media Types of Advanced Search tile:

Media Type	Display	Default	
Books	☑	○	▲▼
Articles	☑	○	▲▼
Journals	☑	○	▲▼
Images	☑	○	▲▼
Scores	☐	○	▲▼
Maps	☐	○	▲▼
All items	☑	◉	▲▼
Databases	☐	○	▲▼
Web Sites	☐	○	▲▼
Research Datasets	☐	○	▲▼
Technical Reports	☐	○	▲▼
Rare Books	☐	○	▲▼
Legal Documents	☐	○	▲▼
Reference Entries	☐	○	▲▼

(After re-ordering, your list may look like the following:)

All items	CD-ROM/DVD-ROMs	Medias
Archival Materials	Databases	Scores
Articles	DVDs	Three Dimensional Objects
Atlases	Images	Videos
Audios	Journals	Videocassettes
Audio CDs	Kits	Web Sites
Blu-rays	LPs	
Books	Maps	

CalState Sandbox Primo Back Office

ExLibris Primo

Home	Deploy & Utilities	General	Local Data	Publishing	FE & Delivery	

Hello
mjun

Search Engine

⟩ Edit Advanced Search Attributes

View :01CALS_UNO   **Tile : Advanced Search**

Interface Language: English ⬍

Search Target Media Types of Advanced Search tile:

Media Type	Display	Default	
All items	☑	⦿	▲▼
Archival Materials	☑	◯	▲▼
Articles	☑	◯	▲▼
Atlases	☑	◯	▲▼
Audios	☑	◯	▲▼
Audio CDs	☑	◯	▲▼
Blu-rays	☑	◯	▲▼
Books	☑	◯	▲▼
CD-ROM/DVD-ROMs	☑	◯	▲▼
Databases	☑	◯	▲▼
DVDs	☑	◯	▲▼
Images	☑	◯	▲▼
Journals	☑	◯	▲▼

Save & Continue to Advanced Tile Configuration.

Save & Continue to Tiles List

Primo Home > Ongoing Configuration Wizards > Views Wizard

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

Hello mjun

Edit Advanced Search Attributes

View :01CALS_UNO   Tile : Advanced Search

Texts of Advanced Search Tile   Interface Language:: [English ⬍]

Code	English Label
Opening Text	
Ending Text	

Define search pre-filters

Search Type	Search Status	everything	course_reserves	all_libraries			
Complex Search Line 25	User Defined	☑	☐	☑	Edit	Delete	▲▼
Complex Search Line 1	User Defined	☑	☐	☑	Edit	Delete	▲▼
Complex Search Line 21	User Defined	☑	☐	☑	Edit	Delete	▲▼
Publication Date	Default	☑	☐	☑	Edit	Delete	▲▼
Material Type 5	User Defined	☑	☑	☑	Edit	Delete	▲▼
Languages 1	User Defined	☑	☑	☑	Edit	Delete	▲▼
Date Range	Default	☑	☑	☑		Delete	▲▼
Complex Search Line 22	User Defined	☐	☑	☐	Edit	Delete	▲▼
Complex Search Line 23	User Defined	☐	☑	☐	Edit	Delete	▲▼
Complex Search Line 24	User Defined	☐	☑	☐	Edit	Delete	▲▼

Create a new search option   Search Type: [Publication Date ⬍]   Create

Cancel & Go back
To Tiles List

Add new search options

Save & Continue
To Tiles List

Continue to Deploy

CalState Sandbox Primo Back Office

Primo Home > Ongoing Configuration Wizards > **Views Wizard**

ExLibris Primo

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

Hello mjun

⟩ Tiles Configuration

View : 01CALS_UNO   **Page :**   [Home Page   ⇕]

All tiles of 01CALS_UNO

Page	Tile	Status	More
Home Page	Basic Search	Configured By Client	Edit Tile
Home Page	Advanced Search	Configured By Client	Edit Tile
Home Page	Main Menu	Configured By Client	Edit Tile
Home Page	Static HTML	Configured By Client	Edit Tile

Go back
To Views List

Continue
To Deploy

Deploy Now.

CalState Sandbox Primo Back Office

Primo Home > Ongoing Configuration Wizards > **Views Wizard**

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

> **Tiles Configuration**

To have the View Configuration take effect in the Front End UI the View Configuration must be deployed.

If you do not deploy the configuration now it can be deployed at any time.
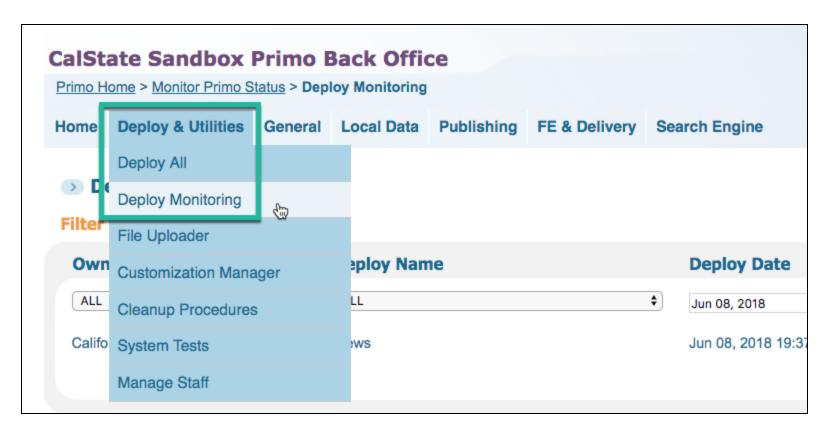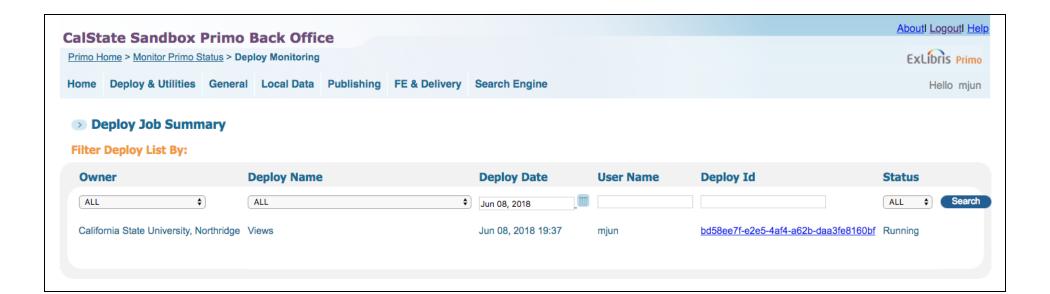
Deploy Now

Go back
To Views List

To check the status of the deployment,

Deploy & Utitlities, Deploy Monitoring

ExLibris Primo

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

> **Deploy Job Summary**

Filter Deploy List By:

Owner	Deploy Name	Deploy Date	User Name	Deploy Id	Status
ALL	ALL	Jun 08, 2018			ALL	Search
California State University, Northridge	Views	Jun 08, 2018 19:37	mjun	bd58ee7f-e2e5-4af4-a62b-daa3fe8160bf	Running

Result

OneSearch

Search for: ○ CSUN Collections   ○ Course Reserves   ⦿ All CSU Libraries

Any field ▾ contains ▾ **the**

AND ▾ Any field ▾ contains ▾

＋ ADD A NEW LINE   ↺ CLEAR

↳ Any field *contains* **the**

| All items |
| Archival Materials |
| Articles |
| Atlases |
| Audio CDs |