

Creating a New Static Facet Based on a MARC Field

The example below will show how to create a new static facet based on a MARC Field.

The example will create a NBS Static Facet that uses the MARC 830 \$a subfield.

It will create a facet called “NBS Facet” in the Primo FE.

For more information on Static Facets please refer to the Primo Back Office Guide.

Create & Deploy New Facet

1. Log into Primo.
2. Click on Ongoing Configuration Wizards > Pipe Configuration Wizard > Normalization Rules configuration.
3. Select to **Edit** your **Rules Set**.
4. Choose to: **Display Empty PNX fields**.
5. Select the **PNX Section of Facets** and choose to **Edit** the **facets:lfc01** section.
6. Click on the **Advanced** button at the top of the screen.
7. Add the following rule:

The screenshot shows the 'Pipe Configuration Wizard' interface for 'Normalization Rules'. The 'Rule group' is set to 'facets:lfc01'. The 'Source' is 'MARC', 'Field' is '830', 'Ind1' is empty, 'Ind2' is empty, 'Subfield' is 'Include', and 'a' is entered. The 'Enabled' checkbox is checked. The 'Conditions logic' is set to 'True'. Under 'Condition 1 - Logic', it is set to 'True'. Under 'Condition 1 - Source', it is set to 'MARC', 'Field' is '830', 'Ind1' is empty, 'Ind2' is empty, 'Subfield' is 'Include', 'a' is entered, and 'Success If' is 'Match Any'. Under 'Condition 1 - Routines', 'General Parameter' is empty, 'Routine' is 'Check that string exists', and 'Parameter' is 'NBS'. The 'Transformations' section shows three transformations: 'Delete characters' with parameter ';', 'Delete Spaces' with parameter ' ', and 'Take first words' with parameter '3'. The 'Behavior' is set to 'ADD'.

This rule can be explained as follows:

Source: the rule is based on the 830 \$a subfield.

Conditions: the rule will be applied to any record that has an 830 \$a subfield and that subfield contains the string “NBS”.

Transformations: the rule will add the first 3 words from the 830 \$a to the <lfc01> facet of the records Pnx. Before it does so it will remove any whitespace and semi-colons.

So, *NBS technical note ; 552.* becomes *NBStechnicalnote*.

8. **Save** and **Deploy** the Normalization Rules.

Edit the Static Facets Code Table

9. Click on Primo Home > Advanced Configuration > All Mapping Tables.
10. Select the Sub System of: **Static Facets**.
11. Choose to **Edit** the **Static Facets** table.
12. From the **Choose a Facet:** dropdown select the Facet you have created. In this case: **Local Field 1**.
13. Add a **Static Facet Name** for the Static Facet. E.g. NBS Facet.
14. **Save** the changes.

Edit the Static Facet Table

15. Saving the new Facet above will have created a new table under the Static Facets Sub System.
16. Choose to **Edit** the new table. In this case called: facet_local1_values.
17. Under **Create a New Mapping Row** add the details for the row.
The Value field is the value the will appear in the PNX.
The Value Name field is the related display in Primo.
e.g. Click on **Create**.

Mapping Table Rows

| Enabled | Value Name | Value* |
|-------------------------------------|-------------------------|-----------------------|
| <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| <input checked="" type="checkbox"/> | NBS Technical Note | NBStechincalnote |
| <input checked="" type="checkbox"/> | NBS Special Publication | NBSspecialpublication |
| <input checked="" type="checkbox"/> | NBS Monograph | NBSmonograph |

18. **Save** the changes.
19. Click on the **Sync** button next to the facets table you have just edited.
This will create a Code Table under All Code Tables > Front End that is based on the mapping table you have created (e.g. facet_local1_values_codes).
This table will show the display codes for your Static Facet.
20. Go to Advanced Configuration > All Code Tables.
21. Select the **Front End Sub System** and edit the **Facet Labels** table.
22. Choose to **Create a New Code Table Row**.
23. Edit the code for your facet table (in this case: default.facets.facet.facet_local1).
Add a Description of the table (e.g. NBS Facet).
24. **Save** the Changes.
25. **Deploy** the changes to the Mapping/Code tables.

Create & Deploy View Updates

26. Click on Ongoing Configuration Wizards > Views Wizard .
27. **Edit** your institutions **View**.
28. Navigate to the **Tiles Configuration** screen.
29. Select **Brief Display** from the **Page** dropdown.
30. Click on **Edit** for **Refine My Results (Facets)**.
31. Select **Local Field 1** for **Add new Facet to tile** and then **Create**.



Add new Facet to tile Facet Type:

32. Activate the new facet for the search tabs you wish to apply it to.
Move the facet up the display list (if required).

| Type | Items to Display | Sort | Default | CSIRO | Articles |
|--------------|--------------------------------|--|-------------------------------------|-------------------------------------|-------------------------------------|
| Library | <input type="text" value="5"/> | <input type="text" value="alpha_numeric"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Local Field1 | <input type="text" value="5"/> | <input type="text" value="alpha_numeric"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Subject | <input type="text" value="5"/> | <input type="text" value="alpha_numeric"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

33. Click on **Save** and **Continue**.
34. **Deploy** the changes.

Run the No Harvest Pipe

35. Click on Publishing > Pipes List.
36. Run the NO_HARVESTING pipe.

End Result

A new facet has been created.

Note: The Static Facet will not display in the FE if all the results stored in the new facet field have the same value.

Looking at the Pnx of a relevant record will show the facet.

e.g. **OMNITAB II user's reference manual**

```
<library>WAITELIB</library>
<atoz>0</atoz>
<lfc01>NBStechanicalnote</lfc01>
```

After the Primo nightly full reindex the Static Facet will display for searches from the FE.

Refine My Results

NBS Facet

NBS Monograph (1)

NBS Special Publication (2)

NBS Technical Note (2)

More options 