Primo VE – What’s new and what’s the same?

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Who is GIL?

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Agenda

- What is Primo VE?
- Primo VE Views
- Display / Local Fields
- Local Resource Types
- USG Policies and Practices
- Future Projects
What is Primo VE?

- What changed? Improved?
  - Unified back end management
    - Alma and Primo are one!
    - Need “Discovery-Admin” role to see Primo VE configs
  - Reduce duplicated processes
    - Code tables, etc
  - Real-time publishing in most cases
    - Some processing takes 15 minutes to “appear”
  - Most config changes are automatic
Views

- Discovery → Display Configuration → Configure Views
- A view is essentially one “instance” of Primo VE containing:
  ○ Scopes, links, search config, record display options, customization package, etc.
Views

- Links/Main Menu
  - Allows institutions to edit/change a wide variety of links
  - Individual institutions can customize on their own
Views

- Advanced Search config
  - Controls basic/advanced search index options - fields, resource types, languages
  - Local fields and resource types can be added using norm rules
Views - Search Scopes, Profiles, & Slots

- Discovery → Search Configuration → Search Profiles
- Hierarchy: Slots → Profiles → Scopes
Views - Search Scopes

- Foundation of searching
- Scopes can be out of the box or custom
- Custom scopes can be based on metadata, inventory info (availability, etc.), or local fields
Views - Search Profiles

- Profiles
  - Currently, most USG profiles are Local resources vs University System resources
  - Can contain just local data, a blend of local and “outside” data (think Central Index), or just “outside” data
  - Within a profile you can have multiple and/or custom scopes
    - Must contain at least one scope
Views - Search Slots

- Slots - Configured in the Views area!
  - Top of the hierarchy
  - Contain one or more profiles
  - Can also be a mix of local data and/or outside data
  - Can be specific to a certain type of resource, full catalog, journals, specific campus, etc.
Views - Brief Results

- Mainly controls facets section
  - Add local and OTB facets
  - Control number of items to display per facet
  - Control sort type - By Size vs Alphanumeric
- Also provides some control over dedup and FRBR
Views - Brief Record Display

- Set the fields that display for each record on Brief Results page
- Also control the appear/location of record “actions” - permalink, email, citation, etc.
Views - Full Record Services

- Mostly use this tab to edit Full Record Details
- Record details controls the display and placement of display fields (local and out of the box)
Display & Local Fields

- It’s all about the Normalization Rules
- Bulk of GIL staff Primo VE work
  - Involves work/testing/distributing display fields
- Alma allows for editing/creating both out of the box and local fields
- Similar to Primo Back Office
- **BUT** Primo VE / Alma uses regular expressions (regex)
Display & Local Fields - Out of the box

- OTB display fields cover things such as Title, Subject, Creator, Contributor, etc.
- GIL staff can edit HOWEVER
- Rules aren’t distributable from NZ
  - So, changes made 28 times!
- Also, OTB search/facet rules aren’t editable (more on that later)
- Mapped OTB - https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/120Other_Configurations/Mapping_to_the_Display%2C_Facets%2C_and_Search_Sections_in_the_Primo_VE_Record#Display_Section_Mapping
Display & Local Fields - Local

- Local display fields are created from scratch
- Direct translation of most Primo BO norm rules
- Cover things like Notes, Audience, Publisher info, etc.
- Can be distributed from the NZ
  - 100 local display fields total
  - Display fields 51 and above can be distributed from NZ
  - Local display fields 1-50 are meant for local use (not distributable)
Alma/Primo VE norm rules use a specific syntax - regex-ish

rule "title"

priority <rule with highest number receives priority>
When
Condition1 <Boolean operator>,
Condition2 <Boolean operator>,
...
Condition(n)
Then
<Transformations>
...
<set display field>
End
rule "Primo VE - Lds65"

  when

      MARC."581" has any "3,a,b"

  then

      create pnx."display"."lds65" with MARC."581" sub without sort "3,a,b"

end
**Display & Local Fields - RegEx**

**rule "Primo VE Display - Contributor"**

**priority 10**

**When**

MARC."700" has any "a,b,c,d,e,j,q,u" AND NOT MARC."700":ind1 equals "0"

**Then**

- set TEMP"1" to MARC."700" sub without sort "a"
- set TEMP"2" to MARC."700" sub without sort "a"
- set TEMP"3" to MARC."700" sub without sort "b,c,d,j,q,u"
- set TEMP"4" to MARC."700" sub without sort "c"
- set TEMP"5" to MARC."700" sub without sort "b,d,j,q,u"
- set TEMP"6" to MARC."700" sub without sort "a"
- set TEMP"7" to MARC."700" sub without sort "a"

- remove substring using regex (TEMP"1","^[\(\[^,\]*\)]")
- remove substring using regex (TEMP"2",",.*$")
- remove substring using regex (TEMP"1","[\,]"")
- remove substring using regex (TEMP"3","[\,]"")
- remove leading and trailing spaces (TEMP"1")
  - concatenate with delimiter (TEMP"1","TEMP"2","\")
  - concatenate with delimiter (TEMP"1","TEMP"3","\")
  - add prefix (TEMP"4","\[\")
  - add suffix (TEMP"4","\]")
- remove substring using regex (TEMP"1","[\(\[${\(\]}\)]")
- remove substring using regex (TEMP"4","[/|:;|=|,]+$")
- remove leading and trailing spaces (TEMP"6")
  - add prefix (TEMP"6","$$Q")
- remove substring using regex (TEMP"5","[\,]"")
- concatenate with delimiter (TEMP"1","TEMP"6","\")
- remove substring using regex (TEMP"7","[\,]"")
- create pnx."display","contributor" with TEMP"1"

**end**
Display & Local Fields - Search/Facet

- Separate from display norm rules
- Can edit local search/facet rules BUT can’t edit OTB ones
- Local search/facet rule creation:
  - Add rule to table in Alma
  - Create display rule, enable for search/facet
  - Create rule
  - Comes with a Test feature!
Local Resource Types

- Majority of resource types are covered - **OTB Resource Types**
- However, some aren’t...so we created local resource types in the NZ:

![Local Resource Types Table](image-url)
Local Resource Types

- Local resource type set-up requires targeting LDR/008/Marc and throwing in some regex
- In this example, LDR, position six ≠ e,f,g,k,o,r AND 008, position 23=b
USG Policies & Practices

- Committees
  - OPAC, Cataloging
- Change request process
  - [https://sites.google.com/view/g3almatraining/primo-opac/interface-changes?authuser=0](https://sites.google.com/view/g3almatraining/primo-opac/interface-changes?authuser=0)
- Local customization?
  - Code/Label changes
What can be changed beyond labels?

- Homepage HTML - Always local
- CSS & JS/Add-ons
  - CENTRAL_PACKAGE
    - Things shared by each institution
    - Mobile CSS
    - Spacing
    - Availability Counts/Blocking Banner/etc.
  - Local view
    - Specific to each institution
    - Branding/Institution colors
    - Chat Widgets/Local banners/etc.
- Why not use Primo Studio?
  - More specific control.
  - Readability.
  - Allows more complexity.
USG Policies & Practices

- OPAC - https://sites.google.com/view/g3almatraining/primo-opac/governance
- Catalog - https://sites.google.com/view/g3almatraining/cataloging/usg-policies
What next?

- Future projects and possibilities
  - ArchiveSpace
    - Currently piloting a sandbox set-up with UNG
  - Primo VE Deduplication Rules Working Group
    - Analyze current dedup rules and make recommendations for changes/additions
  - FRBR
    - Consider FRBR be applied to our records?
Questions?