

Primo VE - What's new and what's the same?

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Who is GIL?

- Chris Fishburn - GIL Application Analyst
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- Sean Boyle - Manager, GIL Technical Support

Agenda

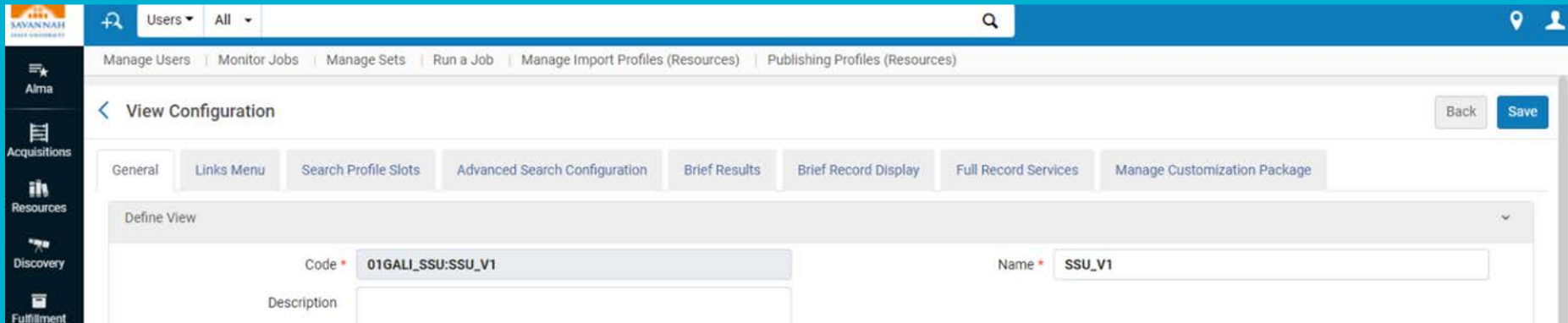
- What is Primo VE?
- Primo VE Views
- Display / Local Fields
- Local Resource Types
- USG Policies and Practices
- Future Projects

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.

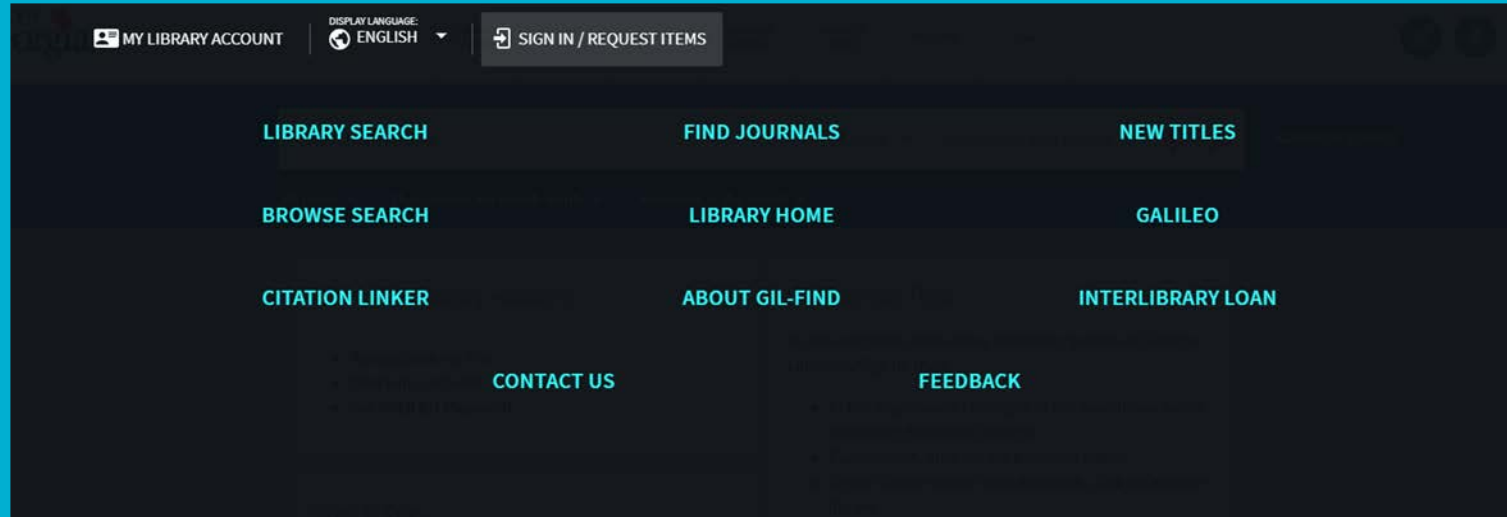


The screenshot displays the Primo VE Admin interface. At the top, there is a navigation bar with the Savannah State University logo and a search bar. Below the navigation bar, there are several tabs: Manage Users, Monitor Jobs, Manage Sets, Run a Job, Manage Import Profiles (Resources), and Publishing Profiles (Resources). The main content area is titled "View Configuration" and includes a "Back" button and a "Save" button. The "View Configuration" page has several tabs: General, Links Menu, Search Profile Slots, Advanced Search Configuration, Brief Results, Brief Record Display, Full Record Services, and Manage Customization Package. The "Define View" section is currently active, showing a form with the following fields:

- Code: 01GALI_SSU:SSU_V1
- Name: SSU_V1
- Description: (empty)

Views

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

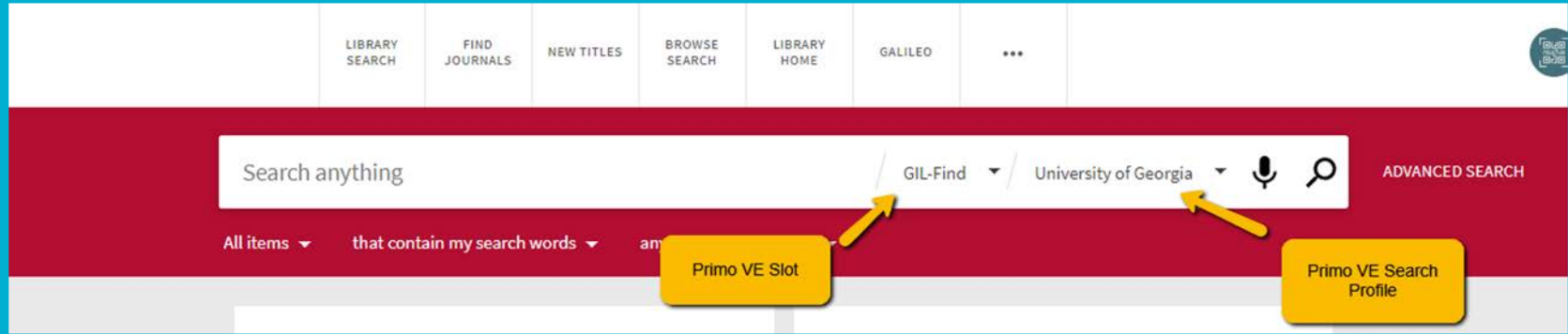


Views

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

The screenshot displays an advanced search configuration interface titled "Search Criteria". At the top, there are two radio buttons for "Search for": "GIL-Find" (selected) and "Course Reserves". To the right, the "Search Scope" is set to "Middle Georgia State University". Below this, there are three search filter rows, each with a dropdown menu and a text input field labeled "Enter a search term". The first row is for "Format", with a dropdown menu currently showing "All items". The second row is for "Language", with a dropdown menu showing "Any language". The third row is for "Start Date", with dropdown menus for "Day", "Month", and "Year". Below these, there are similar dropdown menus for "End Date". On the left side, a "Search Filters" dropdown menu is open, listing "Any field", "Title", "Author/creator", "Subject", and "ISBN". A red arrow points from the "Search Filters" dropdown to the "Format" dropdown. Another red arrow points from the "Search Scope" dropdown to the "Format" dropdown. A third red arrow points from the "Search Scope" dropdown to the "Language" dropdown. At the bottom right, there is a "SEARCH" button with a magnifying glass icon.

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

Select Scope Type *

Q Look-up or select

- My Campuses
- My Libraries
- Custom (Local data)
- Other Indexes
- My Entire Institution
- My Entire Network
- Central Index

Scope Details

Code *

Name *

Description

Scope Population My Institution Entire Network

Scope Conditions

[+ Add a Condition](#)

No conditions have been defined

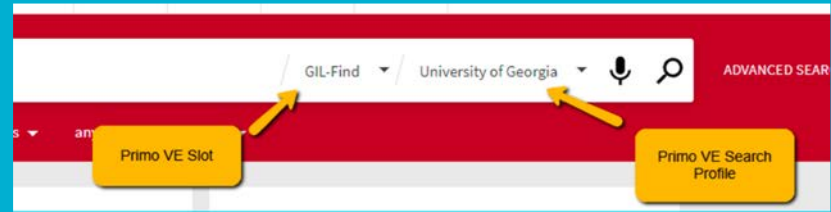
Up to three conditions can be defined

Search Index

Q Look-up or select

- Inventory >
- Local Fields >
- Metadata >

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

Search Profile Details

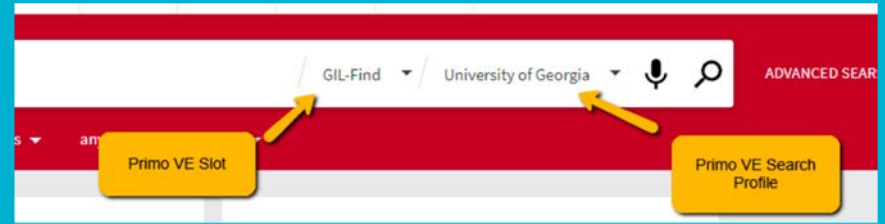
Code: MyInst_and_CI Display Name: Search everything ⓘ

Description: Blended - All records belonging to your institution and your Central Index profile

List of Scopes included in the Search Profile

Code	Name	Description	<input checked="" type="checkbox"/> Filter by Availability	<input type="checkbox"/> Exclude CDI eBooks	All CDI resource types	All CDI disciplines	Search In FT: Yes (Always)
1	CentralIndex	Central Index	All records within your Central Index profile				
2	MyInstitution	My Institution	All records belonging to your institution				

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.

Edit Profile Slot Cancel Save

Define Slot

Code * Name *

Description Tooltip

Select Search Profiles for slot

1 - 11 of 11

Active	Code	Name	Description	Profile Type		
<input checked="" type="checkbox"/>	MyInstitution	Georgia Southern University	All records belonging to your institution	Local Data		...
<input checked="" type="checkbox"/>	DiscoveryNetwork	University System of Georgia	All records within the Discovery Network	Local Data		...
<input checked="" type="checkbox"/>	HendersonLibrary	Zach S. Henderson Library	Zach S. Henderson Library	Local Data		...
<input checked="" type="checkbox"/>	LaneLibrary	Lane Library	Lane Library holdings	Local Data		...
<input checked="" type="checkbox"/>	JournalList	Journal Title List	-	Local Data		...
<input checked="" type="checkbox"/>	NewResources	New Resources (Georgia Southern)	-	Local Data		...
<input checked="" type="checkbox"/>	AvailableSoon	Available Soon (Georgia Southern)	-	Local Data		...

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

Dedup and FRBR

Sort FRBR Versions list by

Define FRBR display for local records Generic Preferred

Enable FRBR Enable Dedup

Criteria for the DEDUP preferred record

Availability None ALMA-P ALMA-E ALMA-D

General Links Menu Search Profile Slots Advanced Search Configuration Brief Results Brief Record Display Full Record Services Manage Customization Package

Facets

Restore Add a Local Facet

Active	Code	Values to display	Sort Type	Search Profile Slots	Additional flags
<input checked="" type="checkbox"/>	Availability	5	By Size	ALL_NOT_CR	-
<input checked="" type="checkbox"/>	Resource type	5	By Size	ALL_NOT_CR	-
<input checked="" type="checkbox"/>	Creation Date	5	None	ALL_NOT_CR	-
<input checked="" type="checkbox"/>	Library	5	By Size	ALL_NOT_CR	Display member libraries separately
<input checked="" type="checkbox"/>	Location	5	By Size	ALL_NOT_CR	-
<input checked="" type="checkbox"/>	Language	5	By Size	ALL_NOT_CR	-
<input checked="" type="checkbox"/>	Creator	5	By Size	ALL_NOT_CR	-
<input checked="" type="checkbox"/>	Corporations/Organiz...	0	By Size	ALL_NOT_CR	-
<input checked="" type="checkbox"/>	Topic	5	By Size	ALL_NOT_CR	-

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.

General Links Menu Search Profile Slots Advanced Search Configuration Brief Results Brief Record Display Full Record Services Manage Customization Package

Display Fields

Restore [icon] [gear]

Fields			
1 Vernacular Title ; Title	[dropdown]		[more]
2 Creator	[dropdown]	[up]	[more]
3 Edition Brief Publisher Creation date	[dropdown]	[up]	[more]
4 Is Part Of		[up]	[more]

Record Actions

Restore [icon] [gear]

Active	Code	Description	Up-Front Action (Up to 3)		
<input checked="" type="checkbox"/>	e-shelf	Add/Remove record to Favorites	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	E-mail	Send record via Email	<input checked="" type="checkbox"/>	[dropdown]	
<input checked="" type="checkbox"/>	Print	Print the record	<input type="checkbox"/>	[dropdown]	[up]
<input checked="" type="checkbox"/>	Permalink	Create a Permalink for the record	<input type="checkbox"/>	[dropdown]	[up]

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)

Edit Full Display Details

Delimiter * :

Fields	
1 Vernacular Title	
2 Title	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3 Uniform title	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
4 Other title	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
5 Former Title	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
6 Creator ; Contributor	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
7 Subject	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Title A critique of postcolonial reason : toward a **history** of the vanishing present / Gayatri Chakravorty Spivak.

Author [Gayatri Chakravorty Spivak \[author\]](#) >

Subject [Philosophy, Modern -- 19th century](#) >
[Philosophy, Modern -- 20th century](#) >
[Social Conditions](#) >
[Culture.](#) >
[Feminism and literature.](#) >
[Feminist criticism.](#) >
[Feminist theory.](#) >
[Philosophy, Modern.](#) >
[Politics and culture.](#) >
[Postcolonialism.](#) >
[Social history.](#) >
[Women and literature.](#) >

Contents Summary [Philosophy -- Literature -- History](#) -- Culture.
"Are the "culture wars" over? When did they begin? What is their relationship to gender struggle and the dynamics of class? In her first full treatment of postcolonial studies, a field that she helped define, Gayatri Chakravorty Spivak, one of the world's foremost literary theorists, poses these questions from within the postcolonial enclave. "We cannot merely continue to act out the part of Caliban." Spivak writes: and her book is an attempt to understand and describe a

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](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)

Display & Local Fields - RegEx

- 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

Display & Local Fields - RegEx

```
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
```

```
Then  
    MARC."700" has any "a,b,c,d,e,j,q,u" AND NOT  
    MARC."700".ind"1" equals "0"  
  
    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"1", "]")  
  
    remove substring using regex (TEMP"1", "[,]")  
    remove substring using regex (TEMP"4", "[,]")  
    concatenate with delimiter (TEMP"1",TEMP"4",",")  
    remove substring using regex (TEMP"6", "(/[:;|=|,)+$")  
    remove leading and trailing spaces (TEMP"6")  
    add prefix (TEMP"6", "$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"
```

Raimi, Sam, TEMP 1

Raimi, Sam, TEMP 2

film producer TEMP 4

Raimi, Sam,

Raimi, Sam,

Sam Raimi

Sam Raimi [film producer]

RegEx removes everything before the first comma

RegEx removes everything after the first comma

RegEx removes extra commas and then TEMP 1 & 2 are concatenated

[] are added to TEMP 4 then concatenated with TEMP 1

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!

Normalization rule for local_field_67

```
rule "Primo VE Marc - Lsr67"  
  when  
    MARC is "521"."a"  
  then  
    create pnx:"search"."lsr67" with MARC "521"."a"  
  end  
  
rule "Primo VE Marc - Lsr67-2"  
  when  
    MARC is "385"."a"  
  then  
    create pnx:"search"."lsr67" with MARC "385"."a"  
  end
```

Test Normalization Rules

9910360822602931

Normalized
Local Field

"lsr67" : "MPAA rating: PG (1-3); PG-13 (4, 5)"

Close



Close

Save

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

1 - 11 of 11 + Add local Resource Type  

Enabled	Code	Display label	Updated by	
<input checked="" type="checkbox"/>	database	Databases	gilstaff	...
<input checked="" type="checkbox"/>	looseleaf	Loose-leafs	gilstaff	...
<input checked="" type="checkbox"/>	microfiche	Microfiche	gilstaff	...
<input checked="" type="checkbox"/>	microfiche2	Microfiche	gilstaff	...
<input checked="" type="checkbox"/>	microfilm	Microfilm	gilstaff	...
<input checked="" type="checkbox"/>	microfilm2	Microfilm	gilstaff	...
<input checked="" type="checkbox"/>	microopaque	Microopaque	gilstaff	...
<input checked="" type="checkbox"/>	microopaque2	Microopaque	gilstaff	...
<input checked="" type="checkbox"/>	pbook	Book Series	gilstaff	...

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

General

Code *

Display Singular Label *

RIS type

Metadata format

Active

Display Plural Label *

Genre

Mapping from MARC records

1 - 2 of 2 + Add Condition

Logic	MARC field and subfield	Value in MARC field	Use Regular Expression
1 -	LDR	^{6}[*efgkor].*	true
2 And	008	^{23}b.*	true

USG Policies & Practices

- Committees
 - OPAC, Cataloging
- Change request process
 - <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?