

Configuring Display Logic Rules

Welcome to this training session on Alma and Primo VE Integration. In this session, you'll see how to configure the display logic rules for your electronic services.

Display Logic Rules allow you to customize the delivery areas of Discovery – namely the View it and Get it menus.

The View it menu can include the links to access open access, selected and full text resources, database services, general electronic services, and the delivery services for digital representations.

The Get it menu can include links for booking and digitization requests, general electronic services, hold requests, and purchase and resource sharing requests.

There are a lot of options here! And since you may not want to display all possible services under all circumstances, you can build Display Logic Rules.

Let's go to Go to Alma Configuration Menu > Fulfillment > Discovery Interface Display Logic > Display Logic Rules.

Here you can see the list of Display Logic Rules for your institution. If your library has implemented campuses, you would also see another section with a list of campus-specific rules.

Let's take a look at the first rule.

In this rule, you can see that the Resource Sharing Request service is not presented when the book is available for loan. The service will, however, be displayed if the book is already checked out by another patron or it is not owned by the institution.

Let's see how this rule was crafted.

This rule is being applied to all user groups – though it's possible to select them from the dropdown here.

In the hide service field, the Resource Sharing Request service is already selected – but this field can contain one or more services from this dropdown.

In this case, there are certain criteria defined – when it's True that the resource is available in the institution, the Resource Sharing Request option will be hidden.

Let's cancel out of this one and see another.

The next rule hides the Resource Sharing Request service from the Get It section when full text is available in the View It section.

This rule also pertains to our Resource Sharing Request service. But this time, the 'with' and 'with value' fields here are blank. This will hide the service if the Full Text Service exists.

Let's cancel out of this one, and see how to create a rule.

OK – so let's say we want to streamline the long list of links from various vendors that might appear in the View Online section. We could do this a couple of ways.

First, we might decide that when Gale has links to the full text, we don't need to show links to EBSCO databases.

We'd Add a Rule, then select

- Hide service = full text
- With = interface
- With value = EBSCOhost
- If exists service = full text
- With = interface
- With value = Gale

Then I'd Add and Close the rule.

Another method that doesn't involve choosing one vendor over another would be to hide one e-collection if another was in the list.

Let's Add another rule, then select

- Hide service = full text
- With = electronic collection
- With value = Taylor & Francis Education eBooks and Taylor & Francis Geography eBooks
- If exists service = full text
- With = electronic collection
- With value = Taylor & Francis Ebooks Complete

And we add and close the rule.

This rule would ensure that if an ebook appeared in either or both of these collections AND in Ebooks complete, the user would only see the Ebooks Complete link.

These rules are applied immediately – we could go into Discovery and see the changes have already taken effect.

You can also change the order of rules using the icon here, and dragging and dropping them. Display Logic Rules are processed sequentially, from top to bottom, and the first one that applies is used. Later rules in the list are ignored, even if they match.

And that is how Display Logic Rules work in Alma and Primo VE!

Thank you for watching!
