

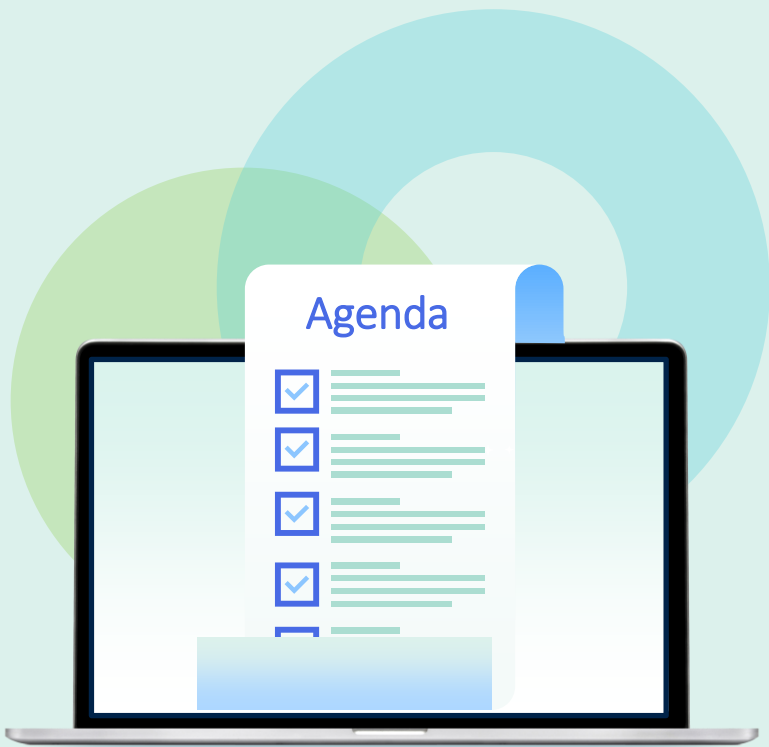


Primo VE Normalization Rules for Display and Local Fields

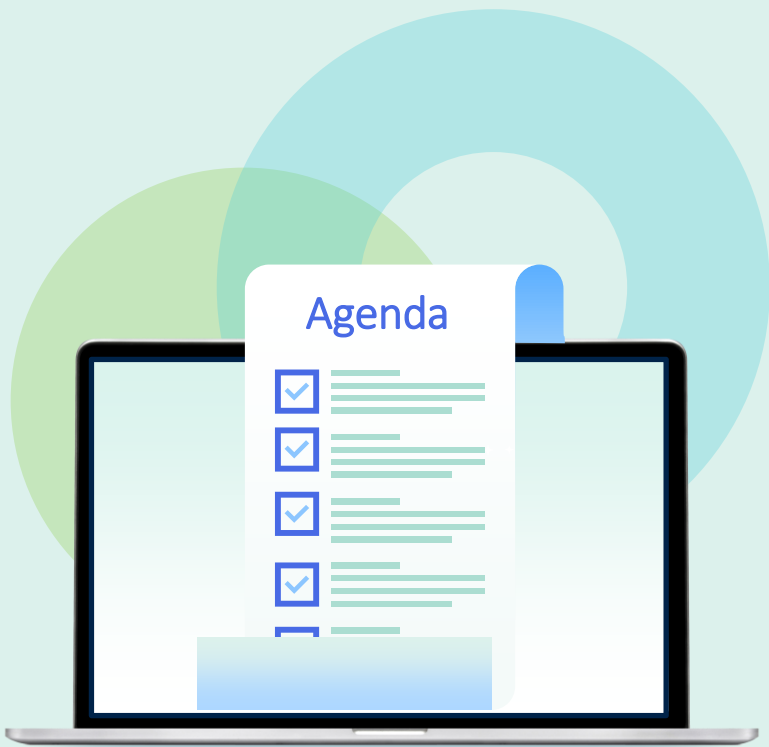
Jenny Draeger – Customer Education Team Lead
Natalia Entin—Technical Support Analyst

EX LIBRIS
Knowledge Days

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- Creating Local Fields
 - Bibliographic Local Field Mapping
 - Normalizing Local Fields
 - Best Practices & Use Cases
- Customizing Default Display Fields
- Translations for Facets and Display
- Indexing Full Text
- Creating Local Resource Types



- **Creating Local Fields**
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Creating Local Fields

```
leader 01943nam 2200457 a 4500
001 99224637300711
005 20201015111300.0
006 m o d |
007 cr#-n-----
008 081119s2009 orua ob 001 0 eng d
010 ##$z 2008050115
020 ##$a1-60469-146-8
035 ##$a(CKB)2550000001039157
035 ##$a(EBL)3410423
035 ##$a(SSID)ssj0000835023
035 ##$a(PQKBManifestationID)12426290
035 ##$a(PQKBTitleCode)TC0000835023
035 ##$a(PQKBWorkID)10989654
035 ##$a(PQKB)11236002
035 ##$a(MiAaPQ)EBC3410423
040 ##$aMiAaPQ $cMiAaPQ $dMiAaPQ
041 ##$aeng
043 ##$an-us---
050 #4$aB439 $b.T275 2009
082 00$a578.554
100 1#$aTallamy, Douglas W.
245 10$aBringing nature home : $bhow you can sustain wildlife with native plants / $c
250 ##$aUpdated and expanded pbk. ed.
260 ##$aPortland : $bTimber Press, $c2009.
336 ##$atext $btxt
337 ##$acomputer $bc
546 ##$aEnglish
500 ##$aFirst ed. published 2007.
504 ##$aIncludes bibliographical references (p. 331-340) and index.
505 0#$aRestoring natives to suburbia: a call to action -- The vital new role of the
650 #0$aNative plants for cultivation $zUnited States.
650 #0$aNatural landscaping $zUnited States.
650 #0$aAnimal-plant relationships $zUnited States.
650 #0$aInsect-plant relationships $zUnited States.
776 #1$a0-88192-992-1
933 ##$aDonated by Bedrock Gardens
```

Details

Title

Creator

Search filters

Donated By

Any field

Title

Author/Creator

Subject

→ Donated By contains

Availability ^

Held by library

Available online

Peer-reviewed Journals

Topic v

Author/Creator v

Location v

Library v

Resource Type v

Language v

Creation Date v

Donated By ^

Donated By Bedrock Gardens (2)

Donated By Jean Dill (1)

Ways to add local fields to the Primo VE Display

Bibliographic Local Field Mapping

- Add local fields into records' display
- Index fields for search
- Generate facets in Primo

Normalization Rules

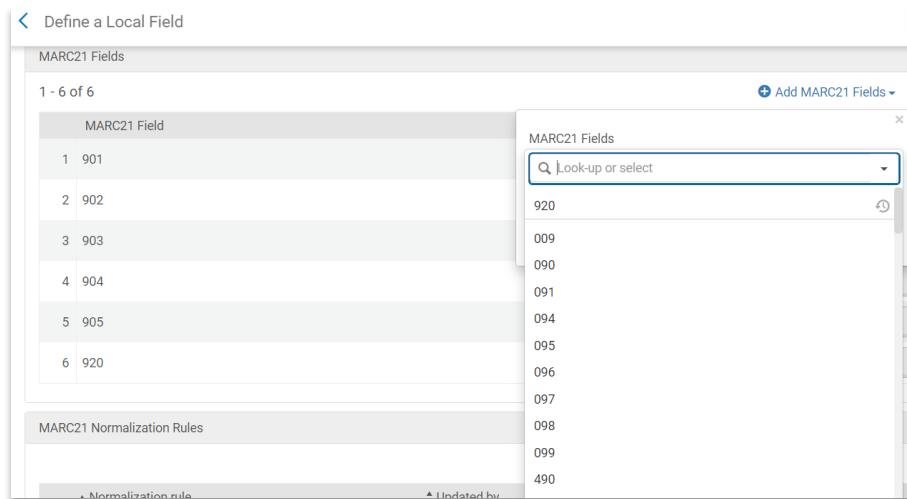
- Add local display, search and facet fields using drools
- Allow for greater flexibility in mapping

Creating Local Fields for Display, Search, and Facets

Bibliographic Local Field Mapping

Display, Search, Facets

- ✓ Local MARC tags
009, 09x, 490, 5xx, 69x, 9xx
- ✓ Full field with all subfields
- ✓ Applied immediately
- ✓ Up to 100 local MARC fields/50 Dublin Core (between both methods)



Creating Local Fields for Display, Search, and Facets

Normalization Rules

Display

- ✓ Able to use all MARC tags
- ✓ Can use any part of fields/subfields
- ✓ Applied immediately
- ✓ Up to 100 local MARC fields/50 Dublin Core (between both methods)

Search & Facets

- ✓ Able to use all MARC tags
- ✓ Can use any part of fields/subfields
- ✓ Open a Support Case to apply
- ✓ Up to 10 local fields

Best Practices & Use Cases – Example 1

Example 1

- Search for *Formatted Contents Note* in the **505**

Solution

- Use the Bibliographic Local Field Mapping
- Enable Search and Facets

Why?

- Because the **505 field** is available and we're using the entire field



Best Practices & Use Cases – Example 2

Example 2

- Search for *Place of Publication* in *260\$a* and *264\$a*

Solution

- Use the Normalization Rules
- Enable Search (and recalculate data)

Why?

- Not using entire *260* and *264 fields*



Best Practices & Use Cases – Example 3

Example 3

- Display and Facet for **Form and Type** in the **380\$a**

Solution

- Use the Normalization Rules for both
- Enable Search and Facets (and recalculate data)

Why?

- Not using entire **380 field**



Best Practices & Use Cases – Example 4

Example 4

- Separate, multiple facets for Topic/Subject - **OTB Topic, Work = 630\$a**, and **Place = 651\$a**

Solution

- Create 3 local fields using Normalization Rules
 - **Local field 1 = Topic = default Topic fields without the 630 and 651 fields**
 - **Local field 2 = Subject: Work = 630\$a**
 - **Local field 3 = Subject: Place = 651\$a**
- Enable Search and Facets (and recalculate data)
- Disable the out-of-the-box **Topic** facet in the View

Why?

- Normalization Method allows us to use specific fields and subfields for the local fields (and edit the default normalization rules)



Best Practices & Use Cases – Example 5

Example 5

- Search for *Acquisitions* in *541 field*
- Display *Acquisitions* using *541\$a* and *\$d*

Solution

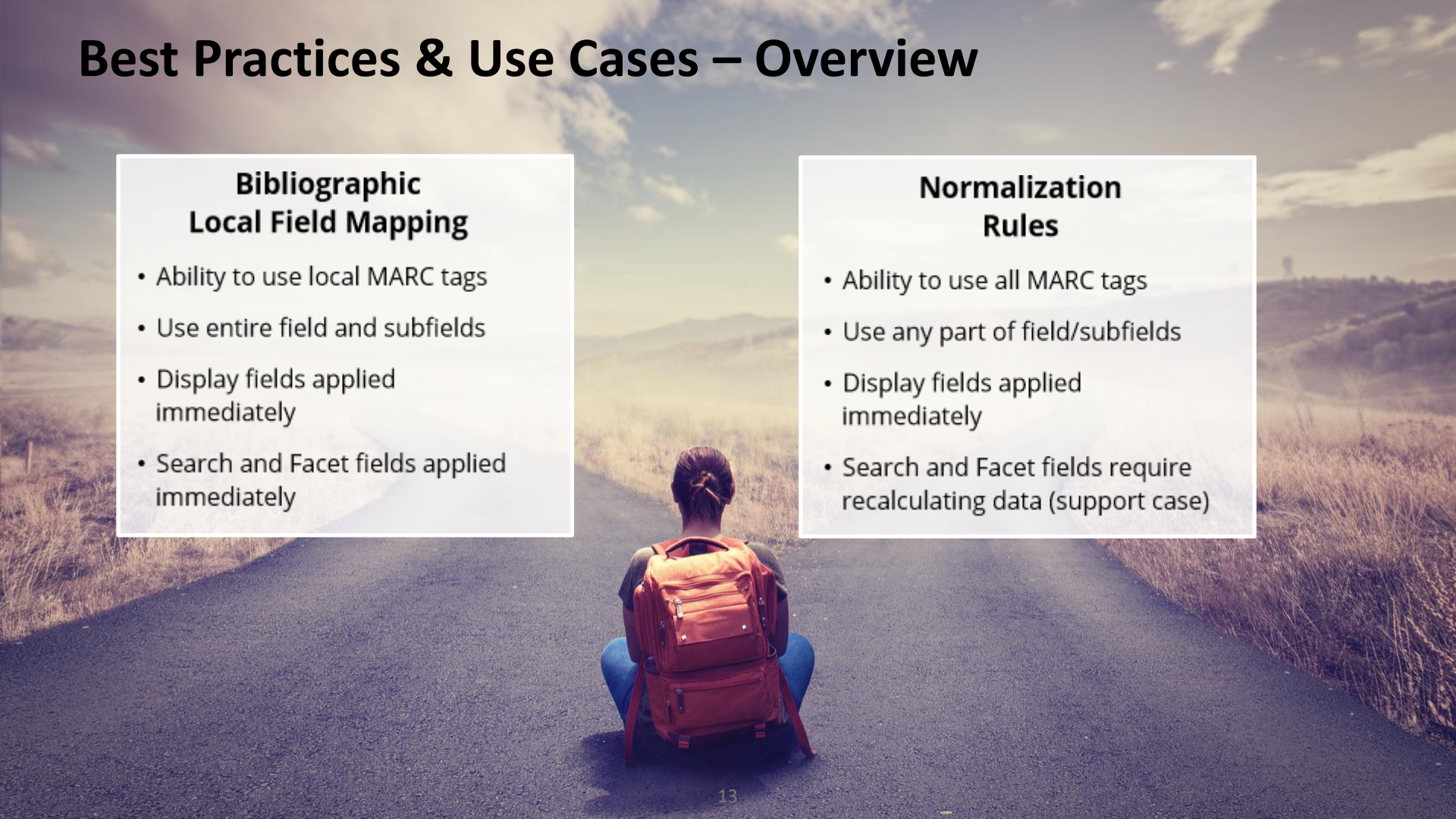
- Use the Bibliographic Local Field Mapping for Search
- Use the Normalization Rules for Display

Why?

- 541 is available to use in the Bibliographic Local Field mappings, and we can adjust the normalization rule for display there



Best Practices & Use Cases – Overview

A person with a red backpack is sitting on a paved road, looking towards a sunset. The road is flanked by dry grass and hills in the distance. The sky is filled with soft, golden light from the setting sun.

Bibliographic Local Field Mapping

- Ability to use local MARC tags
- Use entire field and subfields
- Display fields applied immediately
- Search and Facet fields applied immediately

Normalization Rules

- Ability to use all MARC tags
- Use any part of field/subfields
- Display fields applied immediately
- Search and Facet fields require recalculating data (support case)

Best Practices & Use Cases for Consortia – Example 1

Example 1

- All institutions want to search for *Dewey Categories* using the **082\$a**

Solution

- Create same local field in each institution
- Use the Normalization Rules
- Enable Search and Facets (and recalculate data)

Why?

- 082 is not a local field, and each institution should use the same local field number



Best Practices & Use Cases for Consortia – Example 2

Example 2

- Institution 1 wants to search for **Culture** in the **694** field
- Institution 2 wants to search and facet using the **LCCN** in the **010\$a**
- Institution 3 wants to display the **Formatted Contents Note** in the **505**

Solution

- All institutions can use the same local field
- Institution 1 will use Bibliographic Local Field Mapping method for display and search
- Institution 2 will use the Normalization Rules for search and facets
- Institution 3 will use the Normalization Rules for display

Best Practices & Use Cases for Consortia – Example 3

Example 3

- Institution 1 wants to search for **LCCN** in the **010\$a**
- Institution 2 wants to search for **Place of Publication** in the **260\$a** and **264\$a**

Solution

- Institutions should use different local fields
- Institution 1 will use Normalization Rules for search and facets using **local_field_03**
- Institution 2 will use Normalization Rules for search and facets using **local_field_04**

Why?

- Both institutions are using the Normalization rules, and should use different local fields

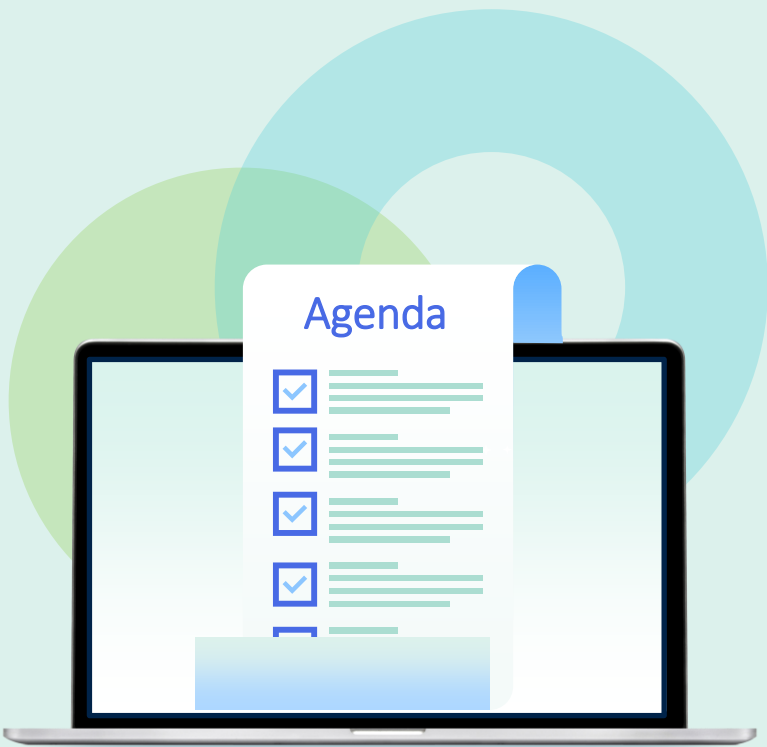
Best Practices & Use Cases for Consortia – Overview

Bibliographic Local Field Mapping

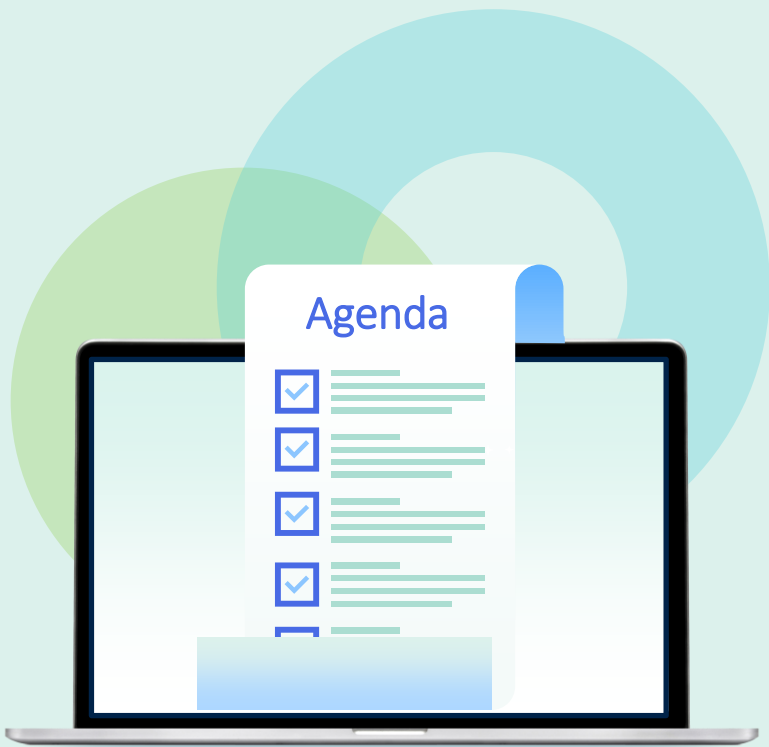
- Each institution sets up local fields (display, search, and facets) independently

Normalization Rules

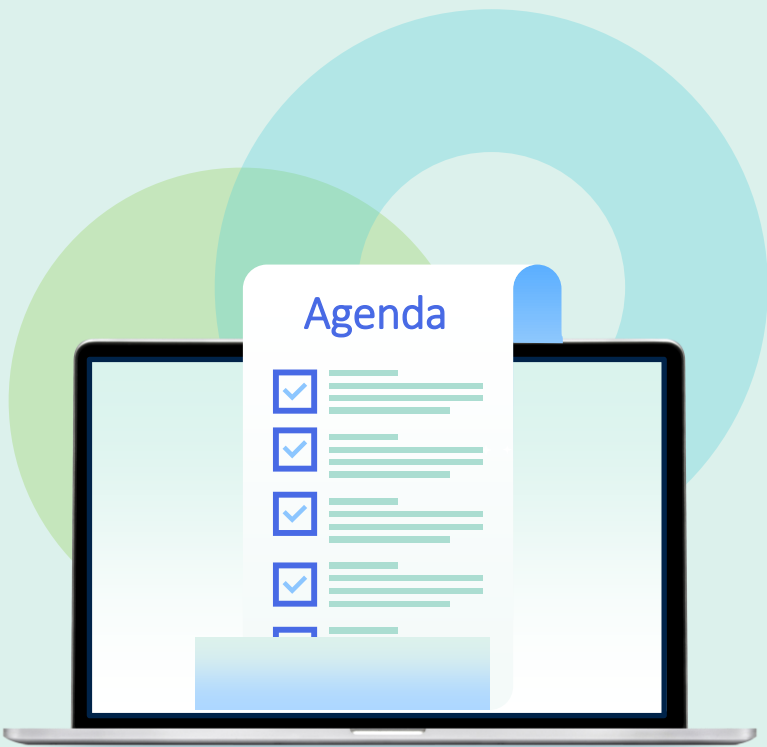
- Each institution sets up local display fields independently
- Common local search and facet field definitions are shared
- Institution-specific local search and facet fields defined separately



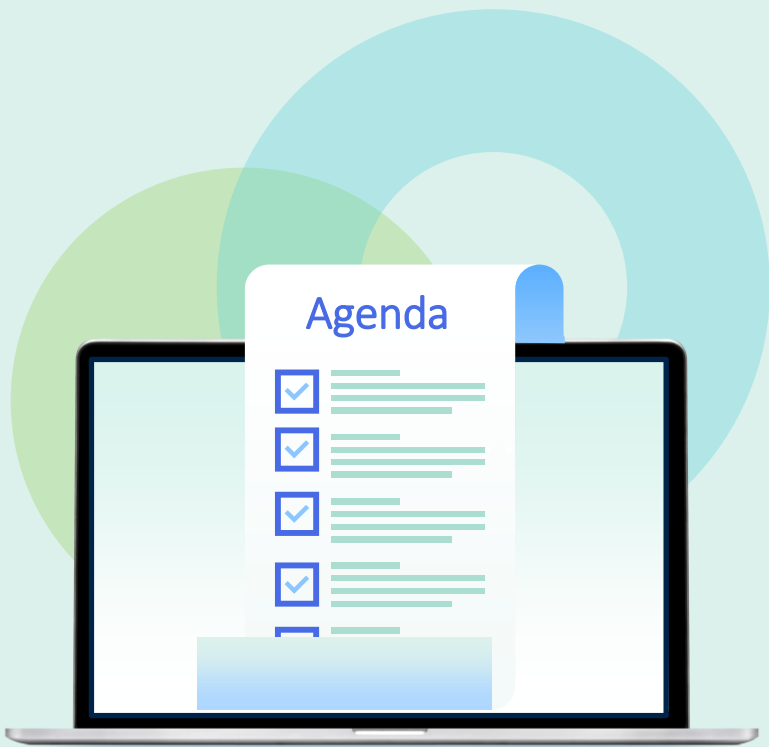
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Resources

Knowledge Center Resources

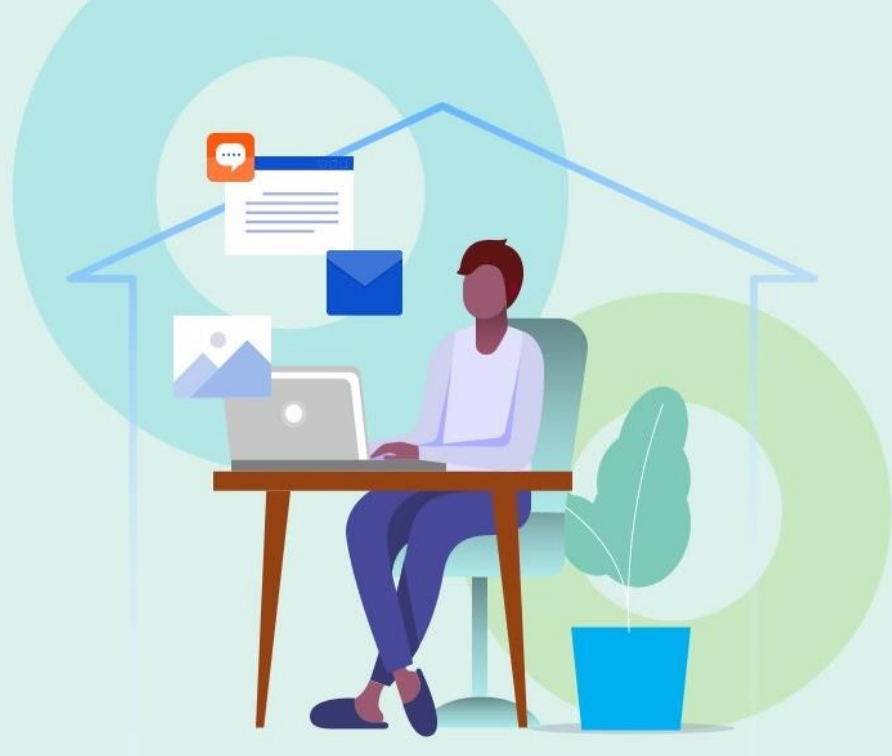
- [Configuring Normalization Rules for Display and Local Fields](#)
- [Managing Display and Local Fields for Primo VE](#)
- [Configuring Local Resource Types for Primo VE](#)

The survey for this session can be accessed via the QR code or URL

Thank you!



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