Primo VE Administration
Local Fields

Hello, Local Fields allow you to map additional metadata so that it can be displayed in the Details section of a record’s full display or indexed for local facets and search fields.

In this session you will learn how to create Local Fields, how to customize default display fields including search and facet areas, and how to create Local Resource Types.

Local Fields let you use information in an item’s bibliographic record to extend search queries, filter search results with facets, and display additional information in the record’s brief and full displays. There are two ways to create Local Fields, using either the Bibliographic Field Method or the Normalization Rules Method.

The Bibliographic Field Method lets you map a number of different fields from four types of MARC records, as well as Dublin Core. This method can only be used if the field is in a supported format, the field is not conditionally mapped based on the content of one or more of its subfields or another field, and you want to map the field’s information as-is. You can have up to 100 local fields for MARC records, and 50 local fields for Dublin Core records.

The Normalization Rules Method uses custom normalization rules to map MARC records and Dublin Core fields from the source records to local display, search, and facet fields. Using this method you can have up to 10 local facet and/or search fields. Additionally, if a member institution of a consortium is using this method for a local field, the same local field should not be used by other member institutions unless they are using either the same normalization rules or the Bibliographic Fields mapping method; as it can be overwritten. Normalization rule changes to local search and facet fields require you to contact Support to re-index all or a set of records.

To access Local Fields, in Alma you’ll go to Configuration > Discovery > Display Configuration > Manage display and local fields. Here you can see all of the mapped fields configured at your institution. Local Fields will all have a Field name that says local\_field. Those that do not are Display Fields defined by normalization rules.

To modify an existing field, click on the row action tool, and select Edit. But let’s say you need to create a new Local Field for donation notes\_, so you’ll click Add field, and select Add local field. You are only required to select a Field to edit, the drop down will only show local fields that are available to be mapped; and give it a Display label. When you select a local field, the Local field details section will display. Check the boxes if you want to enable this field to be used for search and/or facet.

These checkboxes can be used to add a local search index and local facet for local display fields. You don’t need to have the MARC21 normalization rule for search and facet to make it work IF you are using MARC21. However, if you need to use normalization rules and you want to make it available for search and facet, you need to enable it in this secondary table.

If you’re using the Bibliographic Field Method, click Add MARC21 Fields, and select the field or fields you want to add from the drop-down.

Please note that if you cannot find the field you want in the drop-down and do not see the option to add Normalization Rules for Search and Facet, you may need to configure it. By defining the local field on the Local Fields using Search and Facet Normalization Rules page. For more information about how to do this please visit the Knowledge Center.

If you are using the Normalization Rules mapping method you’ll need to choose whether to configure either the normalization rules for display or for search and facet. If you choose the former, the normalization rules for display, you can map any MARC21 field to a local display field. Keep in mind that this will override any mappings defined in the MARC21 Fields section. To edit either of these types of normalization rules click on the row action tool and select Edit.

In the pop-up, you’ll replace the XXX with the field number you want to map followed by the subfield. When you’re done click Save.

Please note, no re-indexing is required for local display fields. Additionally, you can use different mapping methods for display and search and facet, but if you use normalization rules for search and facet, you cannot use the bibliographic method for display. You will need to create separate normalization rules for display information and search and facet information for the field.

The Normalization rules for search and facet will allow you to map any MARC21 field to a local search and facet field. When you’re done click Save. And here’s your new local field.

You can test a normalization rule for search and facet prior to re-indexing. Let’s look at an existing local field. Local Field 40, is configured to return the title of an item using the normalization rules for search and facet. To test it, open the row action tool, and select Edit. Then open the row action tool for the MARC21 normalization rule for search and facet and select Test. In the pop-up you’ll do a repository search to search your local catalog to find an item. The normalized local field will then display in the box below. In this case you can see that it returned the title of the item that was selected. Meaning that the normalization rule is working as expected. Click Close when you’re done.

Once you’re happy with your configurations, click Save. If you created a display rule you can click Apply rules to apply the new rule immediately.

To change what is displayed for a record you can customize the default mappings. Still on the Manage Display and Local Fields page, click Add field, and select Add display field. In the Field to edit drop-down, you can select one of the out-of-the-box display fields. This will populate the normalization rules for the selected field.

Click on the row action tool and select Edit. In the pop-up you can make changes as needed. For more information about modifying normalization rules please visit the Knowledge Center. Click Save when you’re done. Use the back arrow or click Back to return to the Manage Display and Local Fields page.

If you only made changes to display rules, click Apply rules. This will put your changes into effect. Changes to display rules do not require your system to re-indexed. Otherwise, you’ll need to contact support to re-index your records to put the new search and facet rules into effect.

Local Resource Types allow users to find resource types that are configured locally and are not included using the out-of-the-box rules, which are based on standard metadata. For example, your library may need to support the discovery of Local Resource Types such as: exams, book chapters, or case law.

To add a local resource type, still in Alma Configuration, you’ll go to Discovery > Display Configuration > Local Resource Types. Here you can see any Local Resource Types that have been configured at your institution. To add a new type, click Add local Resource Type. The only required fields in the General section are a Code, Display Singular Label, and the Plural Label. Fill in any additional information in the General section. For more information about each of these fields please visit the Knowledge Center.

In the Mapping from MARC records section, click Add Condition. You’ll specify the MARC field and subfield that contains the resource type that you want to map to this local resource type. In the Value in MARC field, enter the specific value of the resource type. If the field has more than one matching values use a semicolon to separate the possible values. For example, an examination paper might have exa;ex;Examination paper.

You can also enter information as a regular expression to extract the needed information. For example, in the Value field you could enter the following to extract the information. This would return the value of the MARC field if the character at position 33 is either an a, o, or c. Because it will match any character 32 times, and then check to see if the next character in the 33rd position is an a, o, or c. In this case we’ll leave this unchecked.

If you add more than one record, you can add conditional logic to each condition. Click Save when you’re done. Your Local Resource Type has now been created. If you didn't check the Active box when creating the resource type, you can use the toggle to activate the new Local Resource Type.

You now know how to create local fields, customize default display fields including search and facet areas, and how to create Local Resource Types.

Thanks for watching!