**Primo VE**

**How To Configure Resource Types**

Resource Type appears in records, as a facet, and as a search criterion.

Primo VE determines the resource type of every item based on its bib record according to mapping conditions.

Primo VE comes with many system resource types with out-of-the-box mapping conditions. These are documented in the Knowledge Center with tables showing which field of the bib record maps to which resource type.

You can modify these mapping conditions, assign a secondary resource type, and create custom resource types. Creating custom resource types is explained in the Primo VE Administration video “Local Fields.” In this video, we will demonstrate how to customize the mapping of system resource types and how to assign a secondary resource type.

Note for consortia: rules and conditions are determined by the owner of the record. If a record is from the Network Zone, then resource type is determined by the conditions set on the Network Zone level.

To customize the mapping conditions for system resource types, open Alma Configuration > Discovery > Display Configuration > Resource types configuration. Click Add/Edit Resource Type Configuration. Select the System Resource Types tab. Select from the drop-down the resource type you would like to customize.

Consider if you want to cancel the existing rules and replace them with your customized ones. If so, check the box for Replace existing rules. If, instead, you want to keep the out-of-the-box mapping rules and simply add to them, do not check the box.

Next, consider if your mapping conditions refer to MARC or Dublin Core records, and use the corresponding section. Click Add Condition. Enter the field and subfield, as well as the value.

If the field may hold several matching values, use a semicolon to separate the possible values. Or, use a regular expression such as this one to define a matching value, in which case, check the box for Use Regular Expression. Then click, Add Condition. Add more conditions if you would like, then click Save.

Click Confirm.

New mapping conditions are applied automatically to all new records that are created or loaded into Alma, as well as any existing records that are modified. To apply the new conditions to relevant existing records, you will need to run a job.

Create a set for all the records that contain the relevant condition. For more information on creating a set, see Managing Search Queries and Sets in the Knowledge Center.

Open Admin > Manage Jobs and Sets > Run a Job. Run the Recalculate Local Resource Types Job and specify the set created in the previous step.

You can assign some records a Secondary Resource Type. This means that the records will display when filtering or searching for either the Main or Secondary Resource Type. To add a Secondary Resource Type, open Configuration > Discovery > Search Configuration > Secondary Resource Type. Click Add Secondary Resource Type. Select one or more of the Main Resource Types, and a Secondary Resource Type. Then add conditions as we demonstrated for customizing system resource types. Click Save.

As before, run the Recalculate Local Resource Types Job to apply the secondary resource types to relevant existing records.

As you can see, these records are labeled as Journals. However, when you look at the Resource Type facet, you can see that they would also be included in a filter for Government documents.

That’s how to configure resource types.