Managing Display and Local Fields for Primo VE

The Display Fields page (Configuration Menu > Discovery > Display Configuration > Manage Display and Local Fields) allows you to perform the following additional configurations:

- Modify the normalization rules used to display information for the out-of-the-box display fields. For more information, see Adding a Display Field.

- Create local fields that you can use to extend search queries, filter search results, and display additional information in the record's brief and full displays. For more information, see Adding a Local Field.

Note

For Alma-Summon environments, see Configuring Local Display Fields.

Display Fields Page

For more information about the out-of-the-box mappings, see Mapping to the Display, Facets, and Search Sections in the Primo VE Record.

Adding a Local Field

The Define a Local Field page allows you to map additional information (such as notes) from the source records to a maximum of 50 local fields in Primo VE, where these fields can then be used to extend search queries, filter search results with facets, and display additional information in the record's brief and full displays. The following mapping methods are provided to populate your local fields:

- **MARC21/UNIMARC Fields** – This method limits you to the following fields, provides out-of-the-box mapping for all subfields, and does not require you to re-index existing records after defining a new local field:
  - **MARC21**: 009, 09X, 490, 5XX, 69X, and 9XX

- **Normalization Rules** – This method uses custom normalization rules to map any MARC21 and UNIMARC fields from the source records to local display, search, and facet fields.
To add a local field:

1. On the Display Fields page (Configuration Menu > Discovery > Display Configuration > Manage Display Fields), select **Add local field** from the **Add field** drop-down list to open the Define a Local Field page.

2. Specify the following fields:
   - **Field to edit** – Select the local field that you want to use.
   - **Display label** – Specify a display label for the information that you are mapping from the source records.

   Select the Globe button if you want to create translations for the label in the Advanced Search Index Fields Labels and Local Fields Labels code tables. For more information, see Configuring Display Labels.

3. Specify the following fields in the **Local field details** section:
   - **Enable field for search** – Select this field if you want the information in this local field to be searchable by users. Regardless of this setting, the system automatically indexes local fields, but they will not be searchable unless you select this check box. If you do not select this check box, you can still display the local field's information in Primo VE. For more details on search indexes, see Adding a Search Index.

---

**Note**

- To use this method for search and facets, you must first indicate which local fields will be used for this purpose. For more information, see Configuring Local Search and Facet Fields for Primo VE.
- You can create a maximum of 10 local facet/search fields.
- 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 MARC21/UNIMARC Fields mapping method.
- Normalization rule changes to local search and facet fields require you to contact Support to re-index all or a set of records.
- **Enable field for facet** – Select this field if you want the information in this local field to be used as a facet to filter search results. Regardless of this setting, the system automatically indexes local fields, but they cannot be used as facets unless you select this check box. If you do not select this check box, you can still display the local field's information in Primo VE. For more details on facets, see [Adding a Local Facet](#).

- **Use the parallel Local Field 01/50 from the Dublin Core record** – For use with Dublin Core records only, select this field if you have defined DC normalization rules that map information to the associated local discovery fields (discovery.local01 - discovery.local50) in the Primo VE DC expanded schema. For more information, see [Using the DC Expanded Schema](#).

- **Use Translations** – When this option is selected, Primo VE will display the translations that are defined in the Local Field Translate code table for the local field's values. For more information, see [Configuring Translations for Local Display and Facet Fields](#). If no translation is provided, Alma will display the value provided by the source record.

- **Use full text links for indexing** – Select this option if you want to index the externally-held full text file (which can be of type PDF, TXT, or HTML) to which this field links in the bibliographic record. During the indexing of the local fields, Primo VE will perform the following actions on each of the full text records:
  - Remove stop words based on the language.
  - Remove HTML tags.
  - Index up to 10,000 terms.

---

**Note**

You can assign this capability to a single local field only.

---

4. If you are using the MARC21/UNIMARC Fields mapping method, configure the **MARC21 Fields** and **UNIMARC Fields** sections, as needed:

   1. Select **Add MARC21 fields** or **Add UNIMARC fields** to open the appropriate dialog box for the source record's format.

   2. Select a field from the drop-down list.

   ![Example of MARC21 Fields Dialog Box](image)

   Example of MARC21 Fields Dialog Box

   3. Select **Add** to save the assignment.

   4. Repeat the previous steps if you want to map multiple MARC21/UNIMARC fields to a single local field. Note that you cannot map more than 20 fields to a single local field.
5. If you are using the Normalization Rules mapping method, configure the **MARC21 Normalization Rules** and **UNIMARC Normalization Rules** sections.

![Multiple MARC Fields Mapped to a Local Field](image)

Select Normalization Rules to Edit

1. Depending on the source record's format (MARC21 or UNIMARC) and type of local field (display or search/facet), edit the following normalization rule rows to display the normalization rules for the local field:

   - **MARC21 normalization rule for display** – This option allows you to map any MARC21 field to a local display field and overrides any mappings defined in the MARC21 Fields section. No re-indexing is required for local display fields.

   - **MARC21 normalization rule for search and facet** – This option allows you to map any MARC21 field to a local search and facet field. To test your normalization rules immediately without having your data re-indexed, see [Testing Normalization Rules for Local Search and Facet Fields](#).

   - **UNIMARC normalization rule for display** – This option allows you to map any UNIMARC field to a local display field and overrides any mappings defined in the UNIMARC Fields section. No re-indexing is required for local display fields.

   - **UNIMARC normalization rule for search and facet** – This option allows you to map any UNIMARC field to a local search and facet field. To test your normalization rules immediately without having your data re-indexed, see [Testing Normalization Rules for Local Search and Facet Fields](#).

---

**Note**

- This option is not applicable to local fields that have not been designated to support custom normalization rules. For more information, see [Configuring Local Search and Facet Fields for Primo VE](#).

- New and modified normalization rules require you to open a Support ticket to have either a set of records or all records re-indexed.

---

Ex Libris, a ProQuest Company
2. Update the normalization rule as needed, and then select **Save** to save your changes to the local field's normalization rules. For more information, see Configuring Normalization Rules for Display and Local Fields.

6. On the Define a Local Field page, select **Save** to create the local field and to return to the Manage Display and Local Fields page.

7. Select **Apply rules** on the Manage Display and Local Fields page to enable your normalization rule changes.

**Note**

- Primo VE provides a normalization template to assist in the creation of the field's normalization rule.
- For each MARC21/UNIMARC field that you are mapping, you must specify a subfield.

---

**Example of MARC21 Normalization Rules for Local Search and Facet Field**

---

**Note**

Normalization rules created for local search and facet fields require you to open a Support ticket to have your records re-indexed. Because a full re-indexing is time consuming, you may want to create a set of records in Alma that contain the relevant metadata condition (for example, 950 $a exists) and include the name of that set in your ticket. For more information on how to create an Alma bibliographic set based on metadata elements, see Managing Search Queries and Sets.

8. To utilize a new local field, refer to the following procedures to configure it in the view:

   - **Adding a Field to a Display Line** – This procedure allows you to add the local field to a display line in the record's brief and full display pages.
   - **Configuring the Details Service** – This procedure allows you to display the local field in the Details section on the record's full display page.
Adding a Search Index – This procedure allows you to add the local search field to the Advanced Search page.

Adding a Local Facet – This procedure allows you to add the local facet to the Brief Results page.

Adding a Display Field

For MARC21 and UNIMARC source formats only, the Define a Display Field page allows you to modify the normalization rules for the following out-of-the-box display fields: Contents, Contributor, Coverage, Creation Date, Description, Dissertation, Edition, Format, Frequency, Genre, Identifier, Includes, Is Part Of, Language, MESH subjects, Other title, Publisher, Related Work, Related titles, Rights, Series, Subject, Title, Uniform title, and Vernacular title.

To add a display field:

1. On the Display Fields page (Configuration Menu > Discovery > Display Configuration > Manage Display Fields), select Add display field from the Add field drop-down list to open the Define a Display Field page.

2. Select an out-of-the-box display field from the Field to edit drop-down list.

3. Depending on your supported formats, edit the normalization rule row in the following sections to display the configured rules for the display field: Marc21 Normalization Rule for display and Unimarc Normalization Rule.

4. When you are finished with the normalization rule, you can either save your changes (Save), cancel changes to current session (Close), or restore the out-of-the-box normalization rule (Restore Default)
5. Update the normalization rule as needed. For more information, see Configuring Normalization Rules for Display and Local Fields.

6. Select Save to create the display field and to return to the Display Fields page.

7. If you have created or modified existing normalization rules for a display field, select Apply rules on the Display Fields page to update your records.

---

Testing Normalization Rules for Local Search and Facet Fields

Prior to applying new or modified normalization rules to the view, you can test a local search and facet field's normalization rules.

---

**Note**

For information on how to add a local search and facet field, see Adding a Local Field and Configuring Local Search and Facet Fields for Primo VE.

---

To test a normalization rule:

1. On the Manage Display and Local Fields page (Configuration Menu > Discovery > Display Configuration > Manage Display Fields), edit your local search and facet field. The Define a Local Field page opens.

2. In the MARC21 normalization rule for search and facet normalization rule row, select Test. The Test Normalization Rules dialog box opens.
3. In the dialog box, enter an MMS ID in the first field using any of the following methods:

- Select the Recent icon
  and then select a previously entered MMS ID from the list.

- Select the Quick Pick icon
  , perform an Alma repository search, and then select a record from the results list.

The results of the test appear in the **Normalized Local Field** box. In the following example, the MARC 385 $a subfield is mapped to the **lsr03** local search and facet field:

![Example Test of Local Search and Facet Field](image)

**Configuring Translations for Local Display and Facet Values**

The Local Field Translate code table (Configuration Menu > Discovery > Display Configuration > Labels) defines translations for local facet and display field values. For a local facet or display field, it is used only when the **Use Translations** option is selected on the Define a Local Field page (see Adding a Local Field). If no match is found in this code table, Primo VE will use the values supplied in the source record.

![Local Field Translate Code Table](image)

By default, Primo VE will use the union of all subfield values to match codes defined in this code table to return a translation. For example, if a source record includes the MARC field **541 SaLAN $bINT $cBIO**, all subfield values "LAN INT BIO" are merged and used to match a single value in this code table. If you want to match specific subfield values, you will need to add the **append translation** command to all drools routines defined for the local display or search/facet field. In the following example, the union of the values only from subfields $b and $c will be compared against this code table to return a translation:

```java
rule "Primo VE - Lds02"
  when
    MARC."541" has any "a,b,c"
  then
```

Ex Libris, a ProQuest Company
To create a translation for a local field’s value:

1. Edit the Local Field Translate code table (Configuration Menu > Discovery > Display Configuration > Labels). The first time that you modify the table, you will need to select Customize.

2. From the Filter drop-down list, select English. The English version will be used as the default for other languages if they are not defined.

3. Select Add Row to open the Add Row dialog box.
   1. Enter the following fields:
      - Code – Enter the value that you are mapping from the source record’s MARC subfield. For example, if you are mapping 907 $a 610medicineAndHealth from the source record, enter 610medicineAndHealth.

      - Description – Enter the English translation. For example: Medicine and Health.

   2. Select Add Row to save your new mapping row and to return to the code table’s list of rows.

4. From the Filter drop-down list, select the language to which you want to translate the value. For example, select Spanish.

5. In the Translation field, enter the specified language’s translation. For example, enter Medicina y Salud.

6. Select Save to save your changes to the code table. The first time that you add a value, you will need to select Customize.