How to – Use Bibliographic Library of Congress Call Numbers in Primo for Browse Search and Virtual Browse

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Use Case

As a user, I want to have a better browsing and serendipitous discovery experience when using Primo Call Number Browse Search and Virtual Browse

Goal

The desired outcome of Virtual Browse and Browse Search is to provide users with a serendipitous browsing experience of local content, as collections increasingly move from physical to online form and the option to physically browse the shelves disappears.

The out-of-the-box (OTB) configuration for Primo Back Office for the Call Number Browse Search and Virtual Browse is to use the Holdings level Call Number in the 852, published to Primo in the AVA.

This is undesirable as

1. The functionality is restricted to only local physical resources
2. A significant – and rising – percentage of physical resources are being moved to offsite storage. As part of this process, our Library changes the 852 in the Holdings to a local running number, and we keep the original Library of Congress Call Number in the Bibliographic Record only. This Holdings level running number facilitates the best use of space without interfiling in our Warehouse, and avoids time-consuming back-shelving projects. However, it also means that Browse Search and Virtual Browse become increasingly more irrelevant, confusing, and contrary to purpose

These issues can be removed and these features made more useful by changing the Primo Back Office configuration to instead use the Bibliographic level Call Number, which is more typically the subject focused Library of Congress Call Number.

Both the Virtual Browse feature in Full Record Display and the Library of Congress Call Number Browse Search use the same Browse section of the PNX, so this process takes care of updating both features at once.

Summary

- Configuration time: 30 minutes to 1 hour for active config, but potentially up to 24 hours if LC filing routine correction is required
- Configuration difficulty: Medium – High, as requires changes to Normalization rules, Mapping Tables, Code Tables, and maybe the Customization Package
Systems Specs

- Alma and Primo New UI
- Primo Multi-tenant Back Office

Primo Back Office Configuration Areas

- Alma Normalization Rules – Browse Section
- Browse Lists Mapping Table (only if LC filing correction is needed)
- Browse Lists Labels Code Table (only if wanting to change labels, such as during LC filing correction)

Primo Back Office – Alma Normalization Rules – PNX Section: Browse

- All sections have not been screenshot, for example all the False exclusions for poor CZ data which can throw off your Browse displays (and also can be done in better ways via string regex, but at this stage I just have them all listed separately for a quick fix)
- Screenshots also include the same process of move to Bibliographic Call Numbers for 090 Local Call Numbers, for consistency of data and configuration
- I also tend to leave the OTB rules in place, but disabled, just in case I make a mess of things and need to start from scratch. These are seen in the overview section, but I've not included them in the Edit area screenshots, as irrelevant to this process
Primo Back Office – Browse Lists Mapping Table (only relevant if LC filing correction is needed)

Primo Back Office – Browse Lists Labels Code Table (only relevant if wanting to change labels, such as during LC filing correction)
Updated display - Virtual Browse using Bibliographic Call Number of SF961 .J65 1960, instead of the Holdings AVA Local Call Number of BA21702

Updated Browse Search example using the Bibliographic Call Number of SF961 .J65 1960, instead of the Holdings AVA Local Call Number of BA21702
Example Source Record

Example Browse Section of the PNX

Ex Libris Relevant Guides

- Virtual Browse release in Primo New UI: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/030Highlights/030Primo_November_2016_Highlights#Virtual_Browse
- Virtual Shelf Tab in Primo Classic UI: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/010The_PNX_Record/150The_Browse_Section/020Virtual_Shelf_Tab
- Browse Search: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/010The_PNX_Record/150The_Browse_Section/030Browse_Search
- Configuring Normalization Rules – The Browse Section: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/010The_PNX_Record/150The_Browse_Section/040Configuring_the_Normalization_Rules
Notes on Library of Congress Call Number Filing Routine

There is a poorly documented update for this area of the Primo Back Office, introduced in the August 2016 Release.

If you’re not aware of this, then you may see very strange and incorrect sorting by LC order in Browse Search and Virtual Browse.

For example, the Virtual Browse highlights a different resource than the record and presents non-related resources to either side, and the Browse Search does not have the record searched at the top of the search results, but it is instead on a previous page, seen only by using the Previous button.

This is especially the case if you find the same situation as I did, where the Mapping Table was found to be partially implemented from the release, leading to a mix of two LC filing routines. If you are in this position, the only option is to move forward to implementing the new routine.

This fix will cause some display issues and functionality loss for 12-24 hours, while you follow the procedure only documented in the release notes, although you can choose to add local code provided in the release notes to your customization package for Virtual Browse during this period to hide the section completely.

- Browse Search – no option of Library of Congress call numbers in the dropdown menu
- Virtual Browse – the boxes appear at the bottom of an Alma record, but are empty of data and have no thumbnails

The process is basically

- Disable all LC mapping rows (both the Is Enabled field = No and Enabled checkbox unticked), Save and Deploy
- Run your Update pipe and wait for indexing and hotswapping
- Enable all LC mapping rows (both the Is Enabled field = Yes and Enabled checkbox ticked), Save and Deploy

Do NOT be tempted to re-enable the settings in the Mapping Table until you are absolutely certain that all records are completely indexed and hotswapped!

If you do this too early, you will need to start all over again.

August 2016 Primo Release with new LC Call Number Filing Routines: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/030Highlights/040Primo_August_2016_Highlights#New_LC_and_NLM_Call_Number_Filing_Routines

Unexpected display of Virtual Browse, with LC Filing Routine issue
Unexpected display in Browse Search, with LC Filing Routine issue

Display Issues and Functionality Loss during correction of LC Filing Routine

Feedback or suggestions

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