Discovery - Primo VE

Discovery - Primo VE Configuration

Secondary Resource Types

In August of 2022, Ex Libris introduced a new feature for Primo VE - secondary resource types. This feature allows records to have at least two resource types. The main resource type will continue to appear in the record view in Primo. The secondary resource type allows records to be found using filters and search pre-filters.

WRLC configured secondary resource types for records of government documents in the WRLC Network Zone. The secondary resource type of *Government Document* is applied to the following main resource types:

- Audios
- Books
- Computer Files
- Images
- Journals
- Maps
- Video/Film

The mapping for government document uses the 008 code for government documents (position 28) with the following regular expression string:

```
^.{28}[acfilmos].*
```

Because this is configured in the Network Zone, it is only applicable to Network Zone records. If your institution would like to recreate these configurations for Institution Zone records, the settings would need to be configured in your Institution Zone.

Once saved, the secondary resource type is automatically added to new records. In order to apply the label to pre-existing records in the catalog, a Recalculate Local Resource Type job must be run on the pertinent records; this job re-indexes the records for Primo VE, thereby updating their labels.

Institution Zone Instructions :

Use the following instructions below if you wish to recreate the NZ settings in your own IZ
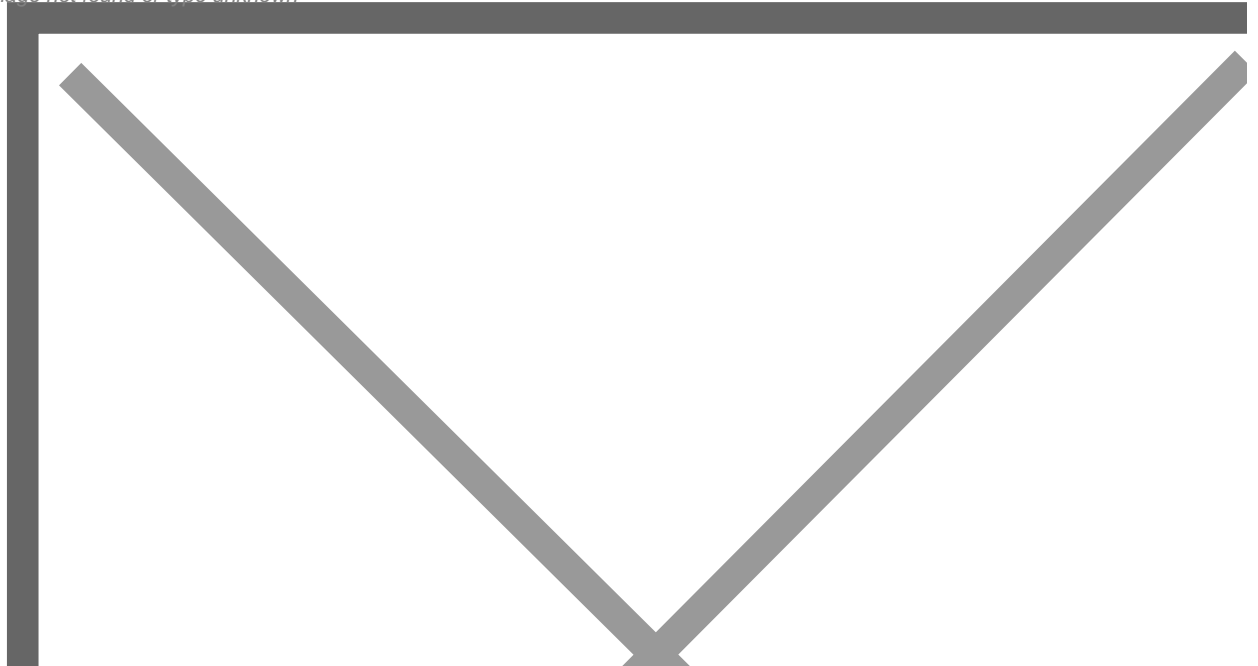
User Roles Needed :

- Discovery - Administrator
- Catalog Administrator OR Catalog Manager

Instructions :

1. Configure secondary resource types

   1. Go to *Configuration > Discovery > Search Configuration > Secondary Resource Type*
   2. Follow the steps below for each of the Main Resource Types listed in the summary section above:
      1. Select *Add Secondary Resource Type*
      2. Choose the *Main Resource Types* from the list in the summary above
      3. Choose the *Secondary Resource Type* of *Government Documents*

         Image not found or type unknown
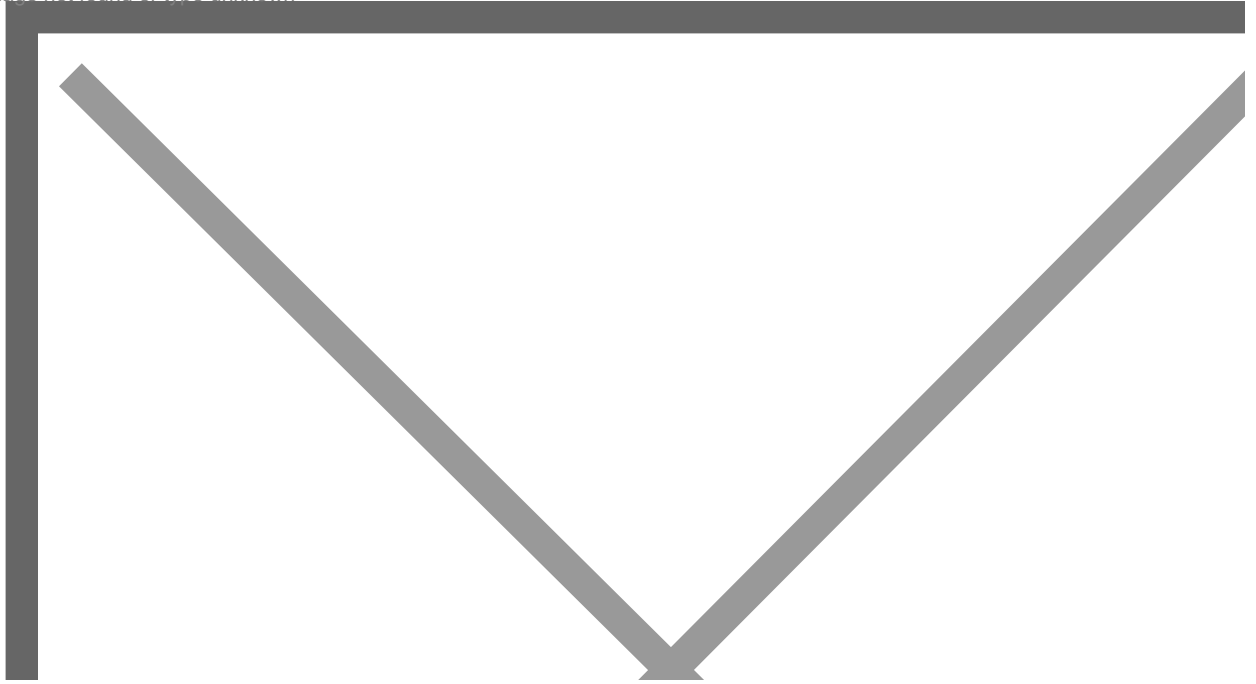

      4. Under *Mapping from MARC Records*, select *Add Condition*
      5. For the *MARC Field and Subfield*, type 008
      6. For the *Value in MARC Field*, copy and paste the regular expression :

         ```
         ^.{28}[acfilmos].*
         ```

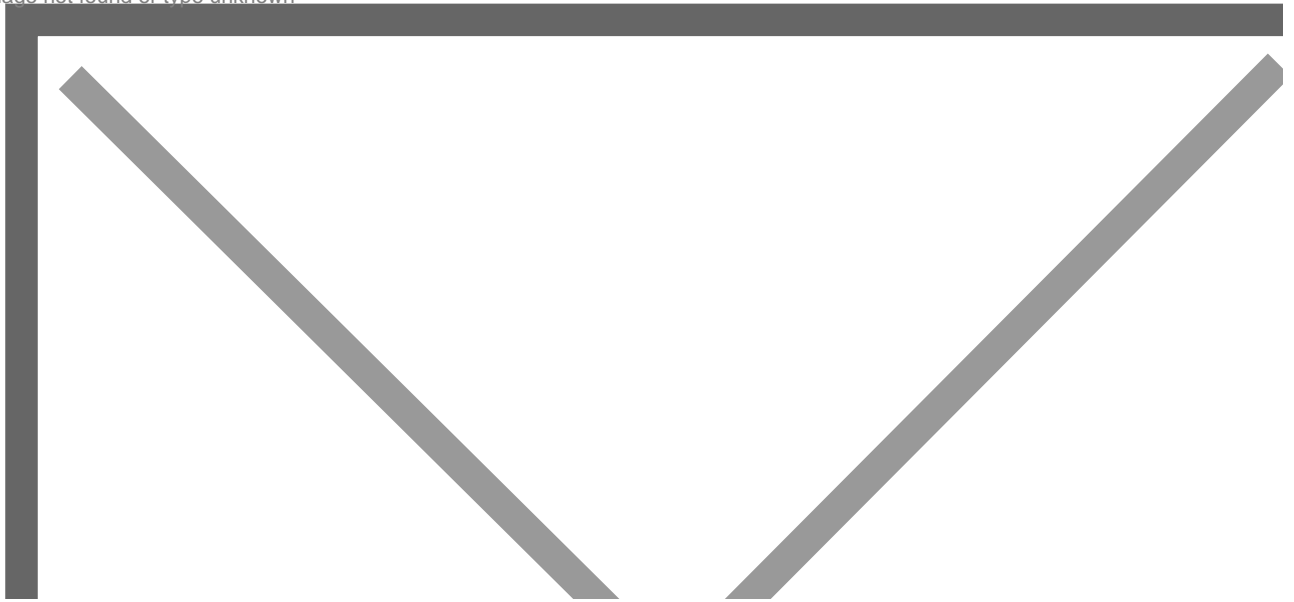   7. For *Use Regular Expression*, click the checkmark
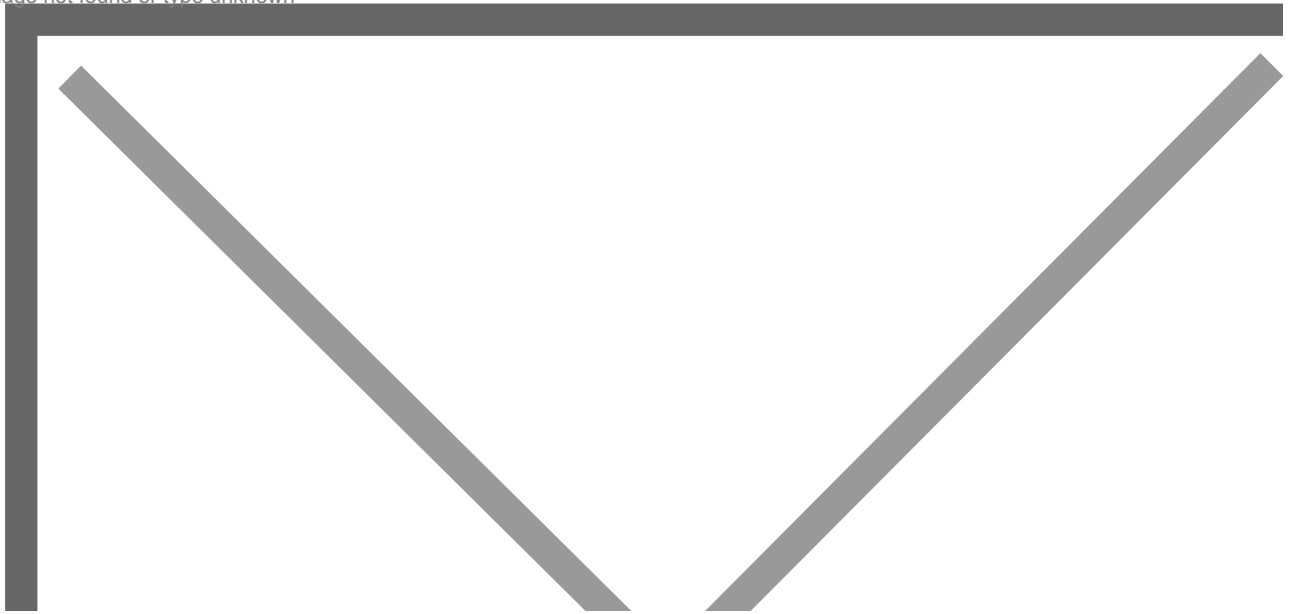
8. Select *Add Condition*

9. Select *Save* at the top right-hand side of the screen to save the Secondary Resource Type rule
10. Repeat these steps for each of the Main Resource Types listed in the [Summary](#) portion of this document.

2. Create an indication rule to find Institution Zone records cataloged as government documents

   1. Go to the *Metadata Editor*
   2. In the upper left-hand corner, select *Rules* and then select *Indication* to view all Indication Rules
   3. Search for the Indication Rule titled *Government Documents*. Right-click on the name of the rule, then choose *Duplicate*

4. A *Duplicate Rule* save page will appear. Click *Save*.
5. The new indication rule is saved to the Institution Zone, and can be used on Institution Zone records.

3. Filter all Institution Zone records by the *Government Documents* indication rule

   1. Perform an Advanced Search in Alma by clicking the magnifying glass icon in the top left-hand corner of the Alma homepage
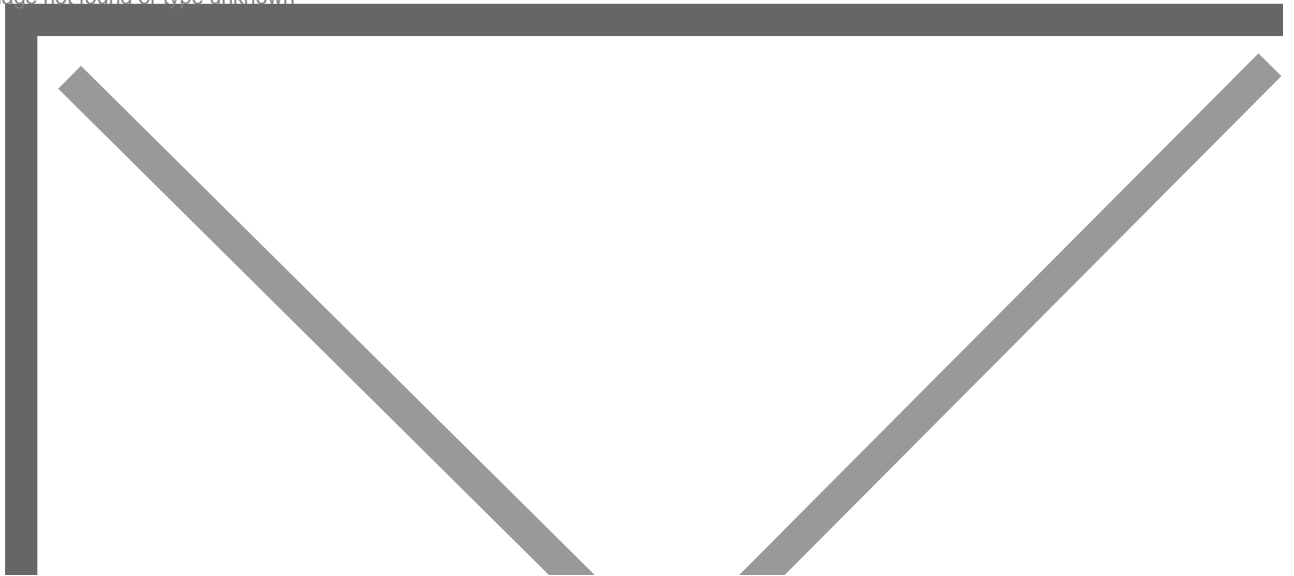   2. Select an *All Titles* search

3. Choose the parameters *Is Linked Equals No*, then click *Search*

   Image not found or type unknown

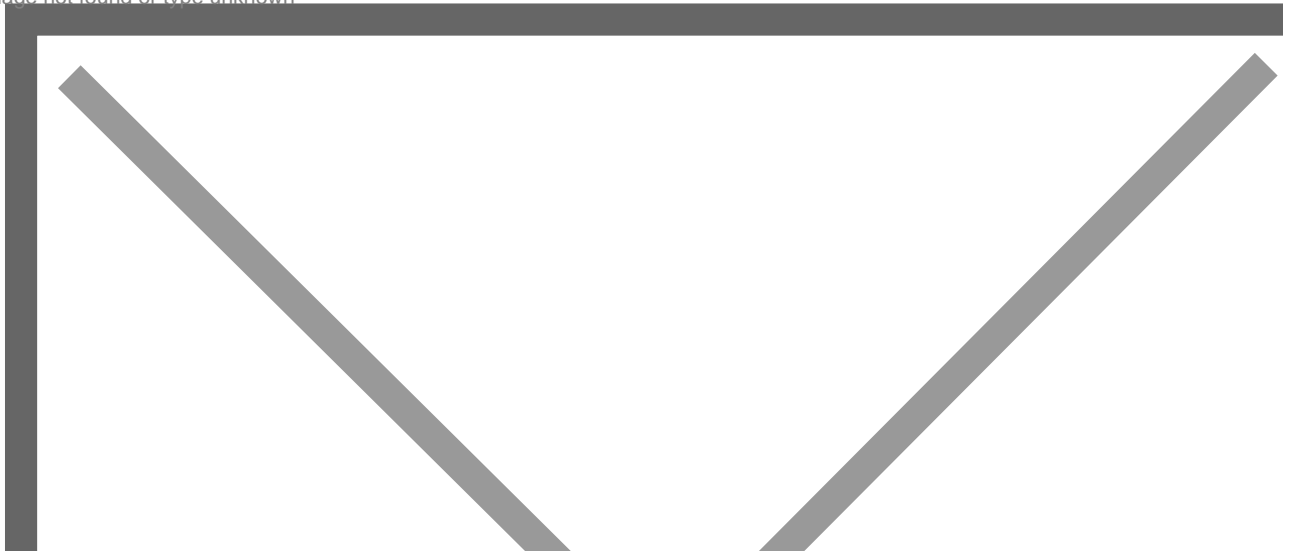4. Once the results are listed, select *Save and Filter Query*

   Image not found or type unknown
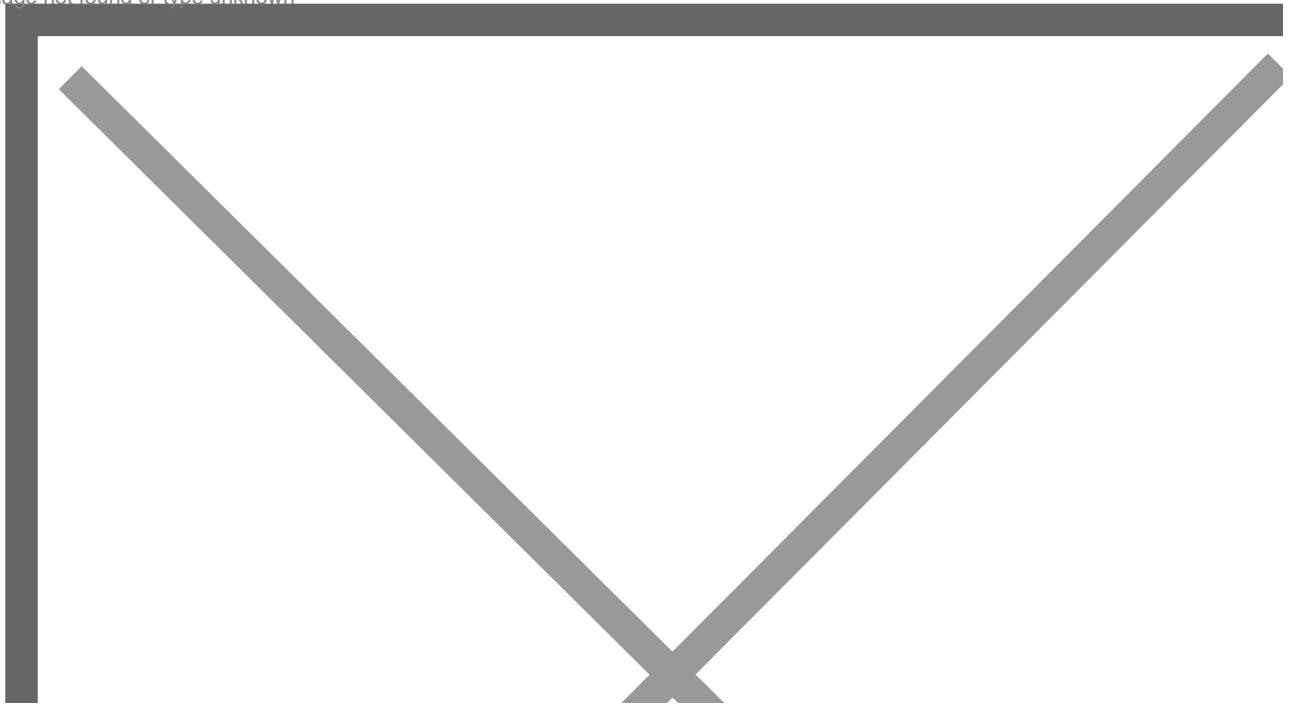
5. Type in a *Set Name*

6. Select *Save and Filter*

7. Choose the Indication Rule created earlier, then select *Filter Set*

Image not found or type unknown

8. Select *Confirm* to filter the set

4. Run the *Recalculate local resource types* job on the above filtered set

   1. Once the filtered set has been created, go to *Admin > Run a Job*
   2. Select the *Recalculate Local Resource Types* job from the Job List, then select *Next*
   3. Select the filtered set created earlier, then select *Next*
   4. Select *Submit*

Alma Resources :

- [Primo VE 2022 Release Notes](#)
- [Configuring Secondary Resource Types for Primo VE](#)
- [MARC21 008 field](#)
- [Working with Indication Rules](#)
- [Managing Search Queries and Sets](#)
- [Manual Jobs](#)

Resource Types Configuration

Below is a list of all custom resource types currently configured in the WRLC NZ.

1. Audio LP's
    - Code : AUDIOLP
    - Display Singular Label : Audio LP
    - Display Plural Label : Audio LPs
    - RIS Type : Sound recording
    - Genre : Unknown
    - Metadata format : Book
    - Logic
        - MARC field and subfield : 007
        - Value in MARC subfield (regular expression):

        ```
        ^s.{2}b.*
        ```

2. Journals (the rules below **are added to** the out-of-the-box configuration for Journals)
    - Replace existing rules : No
    - Logic
        - MARC field and subfield : LDR
        - Value in MARC subfield (regular expression):

        ```
        ^.{6}a[bis].*
        ```

    AND

        - MARC field and subfield : 008
        - Value in MARC subfield (regular expression):

        ```
        ^.{21}m.*
        ```

3. Book Chapters (the rules below **replace** the out-of-the-box configuration for Book Chapters)

    - Replace existing rules : Yes

- Logic
    1. MARC field and subfield : LDR
    2. Value in MARC subfield (regular expression):

    ```
    ^.{6}aa.*
    ```

4. Books (the rules below **replace** the out-of-the-box configuration for Books)

- Replace existing rules : Yes
- Logic
    - MARC field and subfield : LDR
    - Value in MARC subfield (regular expression):

    ```
    ^.{6}a[cdm].*
    ```

Resources

- Configuring Resource Types for Primo VE
- Out-of-the-box MARC Mapping of Resource Types for Primo VE

Managing Custom Banner Notifications in Primo VE

To include an alert banner message in your institution's Primo VE discovery interface, simply fill out the information for your university in **this spreadsheet**.

Below is an example of the fields you may configure.

- For "Message", type the information you wish to display in the banner message.
- For "link", include a URL if applicable. You may leave this field blank.
- For "expirationdate", set the end date for when you want the message to expire.
- You may ignore the remaining fields as they are used by the backend to determine how and when messages are displayed.

	message	link	show	expirationdate
au	Links to Proquest Congressional and Supreme Court Insight databases are not working correctly. Please click here to access these resrouces from the A-Z Database list.	https://subjectguides.library.american.edu/az.php	FALSE	12/19/23

If you do not have access to the spreadsheet linked above, please contact Joel Shields at joel.shields@wrlc.org.