Local Resource Type Issues in VE, Workarounds, Status at ExL

This document is a listing of the known (/potential) issues related to the use of Local Resource Types in the Alliance instances of Primo VE. Where possible, each problem is accompanied by any local workarounds in use, case numbers, and development status from Ex Libris.

Presented:November 16th, 2022
Recording:
https://drive.google.com/file/d/11mTBi1evpMeIgvIaghg8fosm3oHL6-Ds/view?usp=share_link
Presenters: Blake Galbreath, Jeremy McWilliams, Wade Guidry, Ron Chesko, and Kelley McGrath

Notes from NRSG Info Session on November 16th are included at the bottom of the document.

1. Reserves and items in Summit temp locations do not show Print Books type:

Workarounds: Staff are manually entering 972$a; Jeremy M. has developed a PHP script to add 972$a to logical sets; and Wade is working on a Cloud App to perform the same automation. The Cloud App has potential to be used by everyone experiencing this issue.

Since there is no way to edit the quick cataloging template used for creating course reserves to automatically include a 972 (or any other local field), all workarounds require staff action *after* the record is created. Some institutions are looking into setting up a separate MARC template instead of using the quick cataloging template, but there's no word on whether this is a viable alternative to the standard reserves workflow.
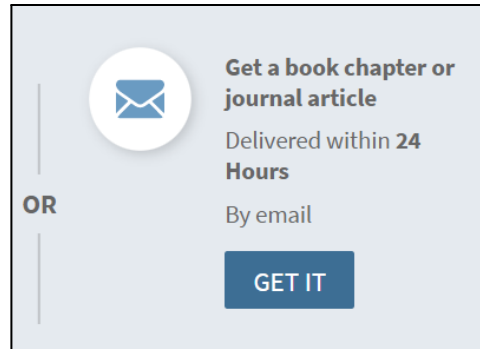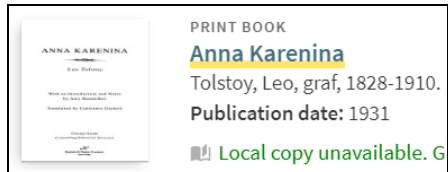
2. Issues related to "Print books" in Rapido libraries:

A) Wrong request form: Article request form used in offer, instead of chapter request form. **This was fixed with November 2022 release.
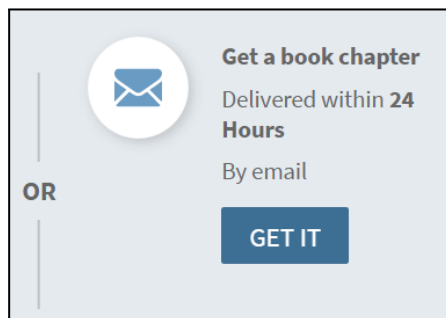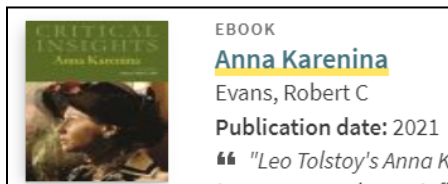
B) However, the code used to display the chapter request offer still overlaps with an article request. Therefore, we have to label it "book chapter or journal article."

Print Book

As opposed to the chapter request for an ebook, which has a separate label code. Therefore, we are able to label it separately from an article request.

Ebook

3. Print books do not exhibit the correct record relationships:

With contextual relationships enabled in Primo VE (Related records display): https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_ (English)/050Display_Configuration/Configuring_Contextual_Relationships_for_Primo_VE, the functionality works for ebooks, but not for print books.

- Ebook example: https://searchit.libraries.wsu.edu/permalink/01ALLIANCE_WSU/1rq08rk/alma99900579 893601842.
- Print book example: https://searchit.libraries.wsu.edu/permalink/01ALLIANCE_WSU/1rq08rk/alma99329236 970101842.

There is an error message in the developer console: "Related item call only for book or book chapter or book review not for : pbooks". I suspect from this that the issue is our consortial split of ebooks (code=books) and print books (code=pbooks). Can you confirm if this is the issue? If

so, can anything be done to make contextual relationships work for print books? For example, could we add code "pbooks" to a contextual relationship table?

Blake opened case #06517819 for WSU on 10/3/22; was moved to Tier 2 on 10/4/22.

Additional context:
- WSU print book, no reviews: https://searchit.libraries.wsu.edu/permalink/01ALLIANCE_WSU/1rq08rk/alma99329236970101842
- Same WSU print book in sandbox: https://alliance-wsu-psb.primo.exlibrisgroup.com/discovery/fulldisplay?docid=alma99329236970101842&context=L&vid=01ALLIANCE_WSU:WSU&lang=en&search_scope=WSU_everything&adaptor=Local%20Search%20Engine&tab=default_tab&query=any,contains,62766073&offset=0
- Seattle Colleges print book, yes reviews: https://sbctc-seattlecolleges.primo.exlibrisgroup.com/permalink/01STATEWA_SEATTLE/1d3d7jg/alma991877763402820

4. Zotero browser connectors cannot parse local resource type:

Reed College has reported this in Support Case #6412216: Zotero browser connectors can't import some items into Zotero as the correct item type, but defaults to the generic "document". This happens for our local resource types. One of our local resource types is "Books" (code: "pbooks"), which we use as a workaround to the lack of distinction between ebooks and print books, which our users expect to be able to differentiate. In Classic Primo, before moving to VE, we also had this custom resource type, and the Zotero browser connector was able to parse it.

Ron Chesko (WWU) has done some additional testing that shows that things like ebooks, streaming video, articles and conference proceedings were importing into Zotero fine (ie: reporting the correct Item Type). Using the Zotero plugin, books (pbooks) and audio CDs were reporting as documents at WWU and WSU. However, exporting the RIS from VE and importing it into Zotero results in the correct Item Type. This may point to more of a Zotero problem.

In looking at the Zotero forums, this isn't the first time there was a Zotero/Primo issue and it looks like Zotero has "fixed" the problem in the past. Here's an example: https://forums.zotero.org/discussion/92610/primo-zotero-book-section-wrongly-identified-as-document-item-type
(Follow this link to go to the forum. You can register for an account and upvote this!)

Margaret Alexander (UO) has also reported this as a current issue in VE. The latest update on Reed's Case came on 11/16/22, and was that

> "I have investigated the issue further, and found that the Zotero Connector is supposed to use the PNX (Primo Normalized XML) "type" field when saving the metadata. For print books, the value in that field is "pbooks". It's not clear why the local resource type mapping stopped working - something may have changed on the Zotero side. Unfortunately, we cannot check the code of the Zotero Connector to see how the Primo record metadata is currently being mapped, since this is a third party product. I would suggest checking with Zotero if there is a configuration file that maps values from the Primo "type" field to its own resource types, and if "pbooks" can be added to that mapping configuration."

5. CDI "ebooks" leading users to Print Book:

CDI resources are all labeled ebook. If members have CDI resources turned on that they don't have FT access to, these will be labeled as ebook, but won't be available to users to read. This causes confusion/frustration, because Primo gives the user a link to the physical book if it's available. So the record says Ebook, but the link is to the print book.

Workaround: Changed text of availability statement to "Check full record for access options".

6. Other potential issues, from the audience
Notes

Information Session: 11/16/22 - Notes

Issue 1 - Bibs not linked to NZ aren't automatically marked with a 972.
- Manual addition is one method to use.
- Jeremy's workaround with a PHP script - A daily script retrieves the records from a logical set, and then use an API to add the 972 "pbooks" code.
  - Set = physical titles without 972 (location based)
  - Script uses set ID - Sets API gets all members' MMS IDs and then Bibs API to add 972 and post the record back to Alma.
  - Can automate the script and have it report out when complete.

- ○ Slides: https://docs.google.com/presentation/d/1R-tWaRky9Y1rxVQrqWd9Q3wJQldwJioIO41R-zGVkVY/edit?usp=sharing
- ○ Github repository: https://github.com/watzek/add-972-to-bib
- ○ Requires a server that can run PHP. If you use a local workstation, make sure it's always on!
- ○ Possible to run this Alliance-wide by updating the code to loop through institutions with API keys - need to work with Tamara on this.
- Wade's approach:
  - ○ Caveat: Requires cataloger permissions in Alma, which isn't ideal for workflows that mostly Circulation folks are performing (at UW).
  - ○ Cloud app that adds 972 "pbooks" to the record without having to edit the bib via the MDE. It's triggered from the record preview screen, and works on one record at a time.
  - ○ Based on AngularJS customization. Could also make use of Alma API with editing privileges to get past Cataloger requirement. But that is going to require more intense scripting work.
- Erin @ UW: So I did one additional thing for automated 972 addition but it isn't spectacular...I created a bib template containing only the local 972 pbooks and named it Course Reserves Print Book IZ Marker, that way staff can use Expand From Template in the MDE with that template to add the field after they create records. Haven't found a workflow to incorporate this into yet but mentioning it in case it's useful.
  - ○ I also created an Alma widget for Course Reserves that shows 972 or not (had to create a SF case to add 972). Then they know to email cataloging to fix. Happy to share the report if helpful. egrant2@uw.edu
  - ○ (Dashboard, not widget at present):

- Cheryl Davenport: We use a normalization rule. Off the top of my head, I don't recall if special permissions are needed to run a job. I have our add 972 set up as a norm rule that runs on a logical set so our Course Reserves specialist (we only have one person

who does have cataloging permissions). Part of the course reserves process is to run this job after creating a new course reserve. Not glamorous, but it works for us.

Issue 2: Print books in Rapido Libraries (8 Alliance members)
- November release fix appears to have helped the situations - Chapter request form opens for print books.
- One remaining issue - the label code is the same for both article and chapter requests, so WSU relabeled this to "Get a book chapter or journal article" to cover both scenarios. Ebooks have an independent label code, so they didn't have to be relabeled.
- Any move to request an independent label for the chapter and article requests from Ex Libris?
  - WSU is going to submit once they're out of implementation. Rose at PSU has been in contact with ExL, and they're aware of the label issue and say they're working on it. Sydney heard the same thing from ExL.

Issue 3: Record relationships
- If you have related records display enabled in VE, you should be able to see links to related things like book chapters and book reviews associated with a book title. But Print books don't display these links, while ebooks do.

Question: Can you give a refresher of what the OTB resource type designations look like? I cannot remember whether all books show as an ebook resource type or just if there is an ebook and a print book for the same resource?
- Out of the box, print and e are put together under the resource type label of "Book". Since we have implemented a resource type for Print Book, many members have changed the OTB label to say "Ebook".
- What's the history of why we separated them out after migration in 2013/14? During migration, there was a strong push for replicating the split present in WorldCat Local.
- Deduplication is also a factor, since our current dedup key (OCLC number only) is not working properly. Ex Libris is aware of the problem, and Development is working with priority to find a fix.

Issue 4: Zotero plugin issue
- Browser connector started having issues distinguishing between pbook and ebook, and will default to the "Document" citation type.

- Ron's testing showed that using the RIS Export from Primo VE and import directly to Zotero results in properly formatted citations. So the issue is with the Zotero connector, and their forum chats indicate that it has happened before.
- Next steps: Get attention on the issue with Zotero directly. No updates at Reed or to Margaret's inquiry with Zotero.
- Everyone is encouraged to follow the link to the forum topic and comment/upvote to get more focus on the issue and expedite a fix.
- Suggestion for Zotero initiative: If we don't see a response on the current discussion reasonably soon, we may want to start a new discussion. It's quite possible that Zotero tech support may be overlooking this particular discussion since it was created in Oct 2021.

Issue 5: CDI issues
- Problems here are intrinsic to the CDI architecture as it relates to Alma/Primo, so not easily solvable, or things that we can work around in a sustainable way.
- CDI records are processed and resource types assigned by Ex Libris's "black-boxed" algorithms. These will have OTB "book" code/label.
- It may be helpful to think of CDI records more as "Format-agnostic book citations", rather than as bib records. The data is not equivalent to MARC21 data.
- CDI records will often present links to print resources, due to related records display settings in Primo VE.
- CDI availability is an attempt to represent both online and tangible availability. Just because a title is in CDI doesn't mean that your institution's users have access to it in an online form. When you don't have full text access, Primo can present links to print version records, which may cause user confusion because the search result is labeled as an "Ebook".
    - The problem is more frequent for institutions that activate collections for search in CDI that they don't have FT access to.
- We also have local resource types for tangible audio and video formats that WILL cause the same problem with users being directed to physical resources from CDI audio/video records - but these resources tend to see less use and these problems may be underreported for that reason.
- Possible option of using secondary resource types (which create facets only) to recreate physical sub-types under the Ex Libris OTB types. Caveat: This would leave us with no way to facet specifically to streaming media types - because they inhabit the primary RT only.

Q&A/Other issues:

- Thank you for this session!
- Kim and Mike at PSU ran into a scoping issue that they'll write up and send to the NRSG. PSU is Rapido, and feels a strong need to differentiate between print and ebook types!
- Is there a plan to drop the ebook/pbook divide?
  - This is an information session only - there's no discussion yet about doing that. The NRSG will at some point survey members on whether they would prefer to drop or keep the distinction.
- Thomas D: CDI - EXL isn't using the same data we're using for resource types, right? So we have no way to enforce that on external records like CDI?
  - Yes. Records from CDI are beyond our control.
- Anyone else on Rapido experiencing issues when using an "Everything" scope?
- I was thinking we weren't able to do secondary faceting in VE? Do I have that wrong or has it/is it changing?
  - It's not secondary faceting, per se. Secondary resource types function as standalone facet values. So if you get a bunch of things in the OTB resource type in your results, you'll see the secondary types show up in the facet pane that you can select from - but it doesn't "drill down" like truly nested facets would.
- Are Rapido records CDI records?
  - Rapido creates the "Global Title Index" of records that is mashed-up with CDI records for retrieval.
- NERS request on resource types?
  - Blake: We're working with Ex Libris on this. Secondary resource types were part of the solution for this, but more work is needed on those.
  - There's also more coming from Ex Libris, that they hope to be able to deliver to us by the second half of 2023.