

# Working with NRSG Local Display Fields in Primo VE

*This document contains instructions for Alliance members on how to use NRSG-developed local display fields 51-100 in Primo VE. Instructions are also given for applying NRSG-developed edits to Primo VE's out-of-the-box (OTB) display fields.*

## **Table of Contents:**

[Adding NRSG Local Display Fields 51-100 to the Full Record Display:](#)

[Using Search and Facet functionality from Local Display Fields 51-100:](#)

[Using facets](#)

[Using search indexes](#)

[Adding NRSG Local Display Fields 31-50 to the Full Record Display:](#)

[Adding NRSG Search and Facet rules for Fields 31-50:](#)

[Editing OTB Display Fields:](#)

[Pairing OTB and NRSG fields for display](#)

[Display Fields for Local Data Fields \(MARC 59X, 69X, 9XX\)](#)

[Method 1: MARC21 Fields](#)

[Method 2: NRSG-provided templates or locally-developed norm rules](#)

## **Adding NRSG Local Display Fields 51-100 to the Full Record Display:**

The NRSG will be using local display fields 51-100 to enable the display of MARC data that is not contained in Primo VE's out-of-the-box (OTB) display fields. In addition, the NRSG may also use a local display field to "re-home" some metadata that is included in the OTB display fields, but needs to be separated for a more user-friendly display.

Local display fields 51-100 are managed from the Network Zone, and are pushed out to members via a process in Primo VE. This "push" from the Network Zone will overwrite any changes made to the local display fields at the IZ level.

Once a local display field is pushed from the NZ to the IZs, it will appear in the list of available local display fields at **Discovery > Display Configuration > Manage Display and Local Fields**.

## Manage Display and Local Fields

1 - 20 of 25

|   | ▲ Field         | ↕ Display label   |
|---|-----------------|-------------------|
| 1 | description     | Description       |
| 2 | format          | Format            |
| 3 | local_field_100 | OCLC Number       |
| 4 | local_field_64  | Event             |
| 5 | local_field_65  | Technical Details |
| 6 | local_field_66  | Accessibility     |
| 7 | local_field_67  | Awards            |

The NRSB manages local fields 51-100

To use one of these local fields in your Primo VE view, navigate to **Discovery > Display Configuration > Configure Views**. Select the view you wish to edit. Navigate to the **Full Record Services** tab, and click on the action button for the **Details** line. Click **Configure**.

View Configuration

01ALLIANCE\_NETWORK:NRS

General Links Menu Search Profile Slots Advanced Search Configuration Brief Results

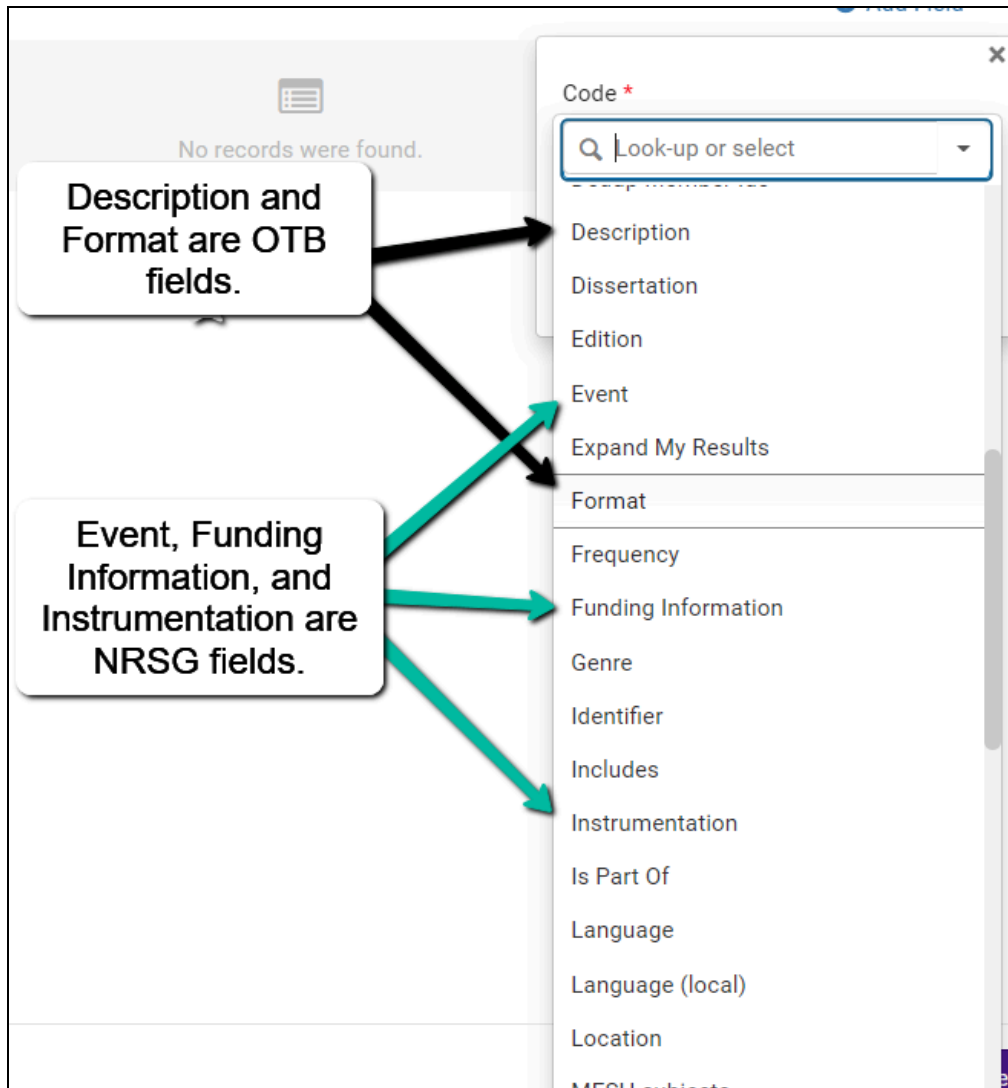
Brief Record Display Full Record Services Manage Customization Package

Customize

| Code             | Description                          |
|------------------|--------------------------------------|
| 1.. searchWit... | Search for articles within a journal |
| 2.. quickAcce... | Quick Access                         |
| 3.. getit_link1  | View It/Get It                       |
| 4.. details      | Record details                       |
| 5.. recommen...  | Recommendations                      |
| 6.. tags         | Tags                                 |
| 7.. browseshelf  | Browse Shelf                         |

Configure

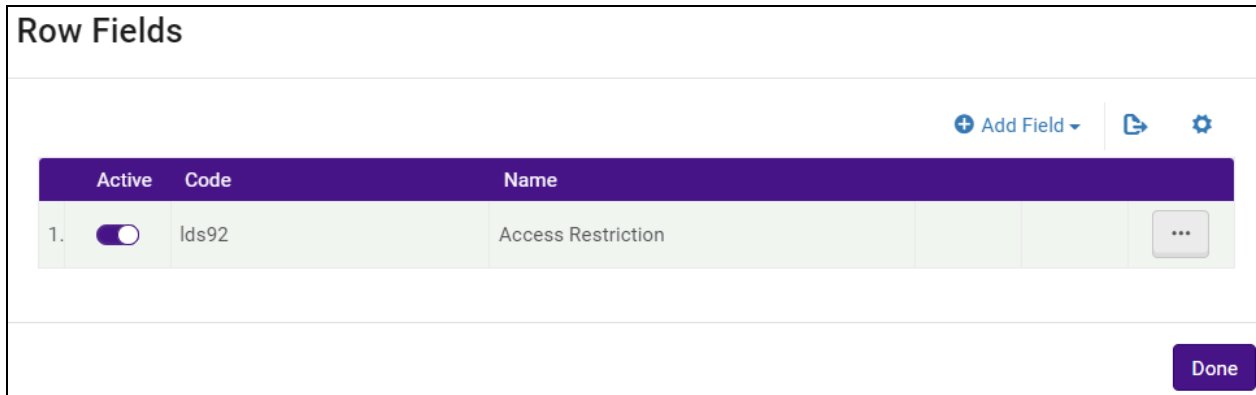
Click on the **Add Field** link at the top of the list. In the Row Fields pop-up that appears, click on the **Add Field** link. Select the local field you wish to add to your view from the drop-down list.



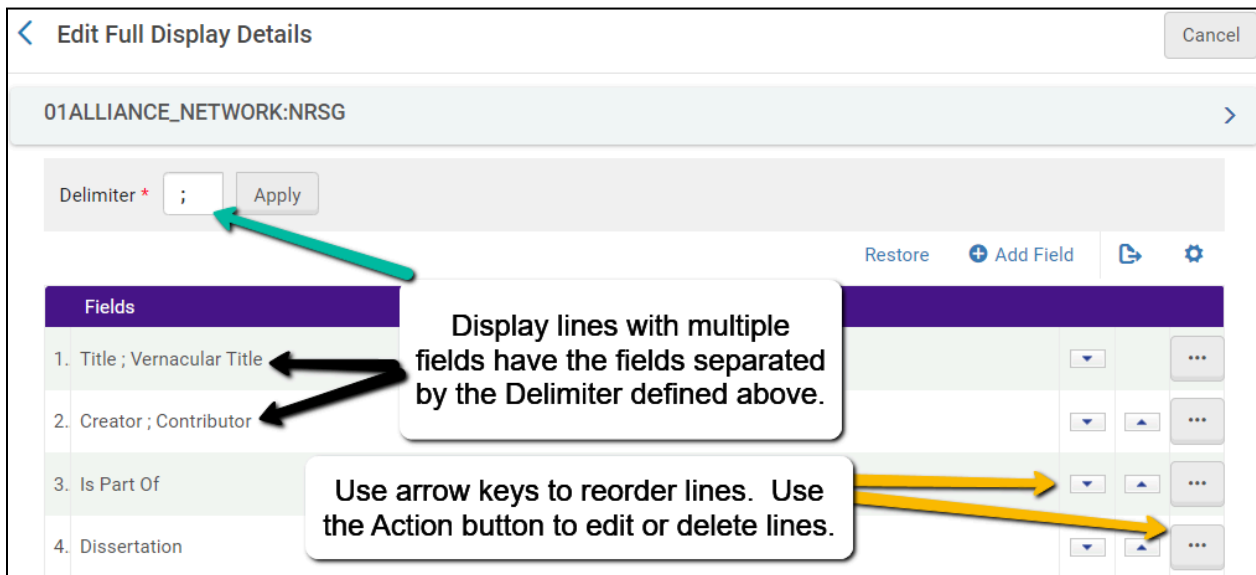
\*Pro Tip\*: The list contains the Display Label of each field - NOT its local field number. To save time, check the list at **Discovery > Display Configuration > Manage Display and Local Fields** to make a note of which Display Label you're looking for before you start your view configuration.

\*Pro Tip\*: You can also use this procedure to turn on an OTB display field - just pick its display label from this list.

Once you select a field, it will display in the row fields pop-up, where its local field number and display label are shown. If you would like multiple fields to appear in the same display line in the Primo VE front end, you can click **Add Field** to add another field to this list. Once you're done adding fields to the display line, click **Done**.



The new line will be added at the bottom of the list of active display fields for your view. To re-order the lines in the Primo VE front end, you'll need to use the arrows on the right side of the table to move your display fields up/down one line at a time. The action button can be used to edit the field(s) contained in the display line, or to delete the display line entirely.



Once you're done making changes, use the arrow at the top left corner of the page to go back to the **View Configuration** page. Navigate to the **General** tab. Click **Save**.

### Using Search and Facet functionality from Local Display Fields 51-100:

Some fields distributed by the NRSB include extra rules that allow them to be used as advanced search indexes or as facets. A couple of extra steps are required to use these additional features in your Primo view.

#### Using facets

To make use of a facet distributed by the NRSB, navigate to **Discovery > Display Configuration > Configure Views**. Edit the desired view, and go to the Brief Results tab. In the facets section, click **Add a Local Facet**. From the drop-down that appears, select the local facet you want to

use and click the **Add Facet** button. You can now edit the facet's settings to customize the number of values displayed, sort type, etc.

The screenshot shows the 'Advanced Search Configuration' tab in the Primo VE interface. The 'Facets' section is active, displaying a table of existing facets. A callout box with the text 'Click here to add a facet' points to the '+ Add a Local Facet' button. A modal window titled 'Local Facet' is open, showing a search input field with 'Musical Key' and an 'Add Facet' button.

| Activ | Code         | Values to display | Sort Type     | Search Profile S |                                     |
|-------|--------------|-------------------|---------------|------------------|-------------------------------------|
| 1.    | Availability | 5                 | By Size       | ALL_NOT_CR       |                                     |
| 2.    | Topic        | 0                 | By Size       | ALL_NOT_CR       |                                     |
| 3.    | Creator      | 0                 | By Size       | ALL_NOT_CR       |                                     |
| 4.    | Library      | 0                 | Alpha Numeric | ALL_NOT_CR       | Display member libraries separately |
| 5.    | Institution  | 0                 | Alpha Numeric | ALL_NOT_CR       | -                                   |
| 6.    | Location     | 0                 | Alpha Numeric | ALL_NOT_CR       | -                                   |

Full documentation on facet use and configuration is available at

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/050Display\\_Configuration/010Configuring\\_Discovery\\_Views\\_for\\_Primo\\_VE#Adding\\_a\\_Local\\_Facet](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Adding_a_Local_Facet)

NOTE: If you want to use any of your local display fields 1-30 for search/facet functionality and need to use the normalization rules method to do so, you'll need to [check this spreadsheet](#) and coordinate your field use with other Alliance members.

### Using search indexes

To enable any of the NRSG's search-enabled fields as an advanced search index, navigate to **Discovery > Display Configuration > Configure Views**. Edit the desired view, and go to the Advanced Search Configuration tab. In the List of Indexes section, click the **Add Index** link.

General Links Menu Search Profile Slots Advanced Search Configuration Brief Results Brief Record Display Full Record Services

Manage Customization Package

List of Indexes

Enable For Basic Search

1 - 10 of 10

Restore **+ Add Index**

| Active                              | Code    | Name    | Search Profile Slots |
|-------------------------------------|---------|---------|----------------------|
| <input type="checkbox"/>            | any     | Any     | ALL                  |
| <input checked="" type="checkbox"/> | title   | Title   | ALL                  |
| <input checked="" type="checkbox"/> | creator | Creator | ALL                  |

Click here to add a search index.

Using the **Search Index** drop-down, select the index you want to add (this matches the NRSG field name) and click **Add Index**. Now you can move the index around in the list of indexes, and edit the index as needed.

**Add Index**

Search Index **Musical Key**

1 - 3 of 3

| Activ                               | Code         | Name                           | Description                              |
|-------------------------------------|--------------|--------------------------------|--|
| <input type="checkbox"/>            | ALL          | All search slots               | All search slots                         |
| <input checked="" type="checkbox"/> | ALL_NOT_...  | All Except Courses search slot | All Except Courses search slot           |
| <input checked="" type="checkbox"/> | Discovery... | Everything                     | All records within the Discovery Network |

Cancel **Add Index**

Pick the index you want to add here.

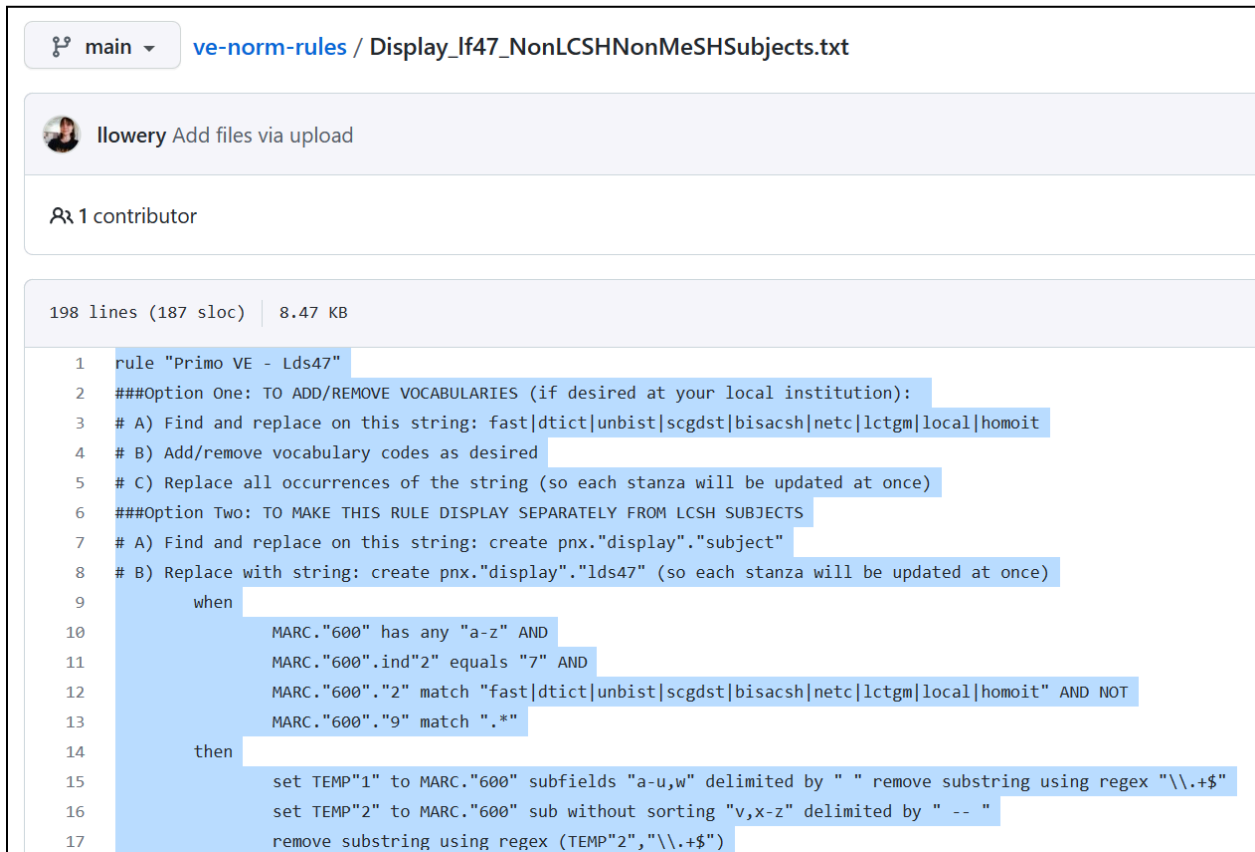
Full documentation on advanced search configuration is available at [https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/050Display\\_Configuration/010Configuring\\_Discovery\\_Views\\_for\\_Primo\\_VE#Adding\\_a\\_Search\\_Index.2C\\_Resource\\_Type.2C\\_or\\_Language\\_to\\_Advanced\\_Searches](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Adding_a_Search_Index.2C_Resource_Type.2C_or_Language_to_Advanced_Searches)

### Adding NRSG Local Display Fields 31-50 to the Full Record Display:

Local fields 31 - 50 are developed by the NRSG, but are not managed in the NZ. In these cases, each member institution needs to go to the NRSG Github Repository, copy the code for a given local field, and paste that code into the local field of their IZ instance.

For example, this is how member institutions can create Local Field 47.

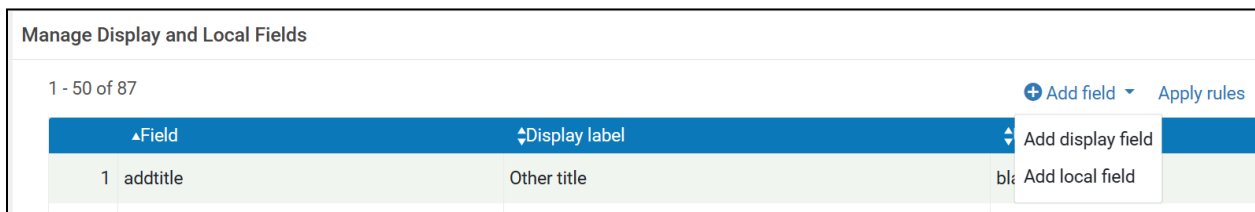
Copy the code from the NRSNG Github Repository for a given local field (be sure to scroll all the way down when copying):



The screenshot shows a GitHub repository file named "Display\_Lf47\_NonLCSHNonMeSHSubjects.txt" in the "ve-norm-rules" directory. The file is 198 lines long (187 sloc) and 8.47 KB. The code is a MARC normalization rule for Primo VE. It includes comments for two options: Option One (adding/removing vocabularies) and Option Two (making the rule display separately from LCSH subjects). The rule uses MARC field indicators and subfields to identify records and then uses regex to format the display string for local field 47.

```
1 rule "Primo VE - Lds47"
2 ###Option One: TO ADD/REMOVE VOCABULARIES (if desired at your local institution):
3 # A) Find and replace on this string: fast|dtict|unbist|scgdst|bisacsh|netc|lctgm|local|homoit
4 # B) Add/remove vocabulary codes as desired
5 # C) Replace all occurrences of the string (so each stanza will be updated at once)
6 ###Option Two: TO MAKE THIS RULE DISPLAY SEPARATELY FROM LCSH SUBJECTS
7 # A) Find and replace on this string: create pnx."display"."subject"
8 # B) Replace with string: create pnx."display"."lds47" (so each stanza will be updated at once)
9     when
10         MARC."600" has any "a-z" AND
11         MARC."600".ind"2" equals "7" AND
12         MARC."600"."2" match "fast|dtict|unbist|scgdst|bisacsh|netc|lctgm|local|homoit" AND NOT
13         MARC."600"."9" match ".*"
14     then
15         set TEMP"1" to MARC."600" subfields "a-u,w" delimited by " " remove substring using regex "\\.+ $"
16         set TEMP"2" to MARC."600" sub without sorting "v,x-z" delimited by " -- "
17         remove substring using regex (TEMP"2", "\\.+ $")
```

In Primo VE, go to Discovery > Manage Display and Local Fields > Add Field > Add Local Field



The screenshot shows the "Manage Display and Local Fields" interface. It displays a table with one row for "addtitle" (Field 1) with the display label "Other title". There are buttons for "Add field", "Apply rules", "Add display field", and "Add local field".

| Field      | Display label |                    |
|------------|---------------|--------------------|
| 1 addtitle | Other title   | bl Add local field |

In Field to Edit, select local field number and assign a name under Display Label. Under MARC21 Normalization Rule for Display, click the three dots and select Edit. When the dialog box opens, erase its contents and paste the code you have on your clipboard. Click Save.



```
rule "Primo VE - Lds47"
###Option One: TO ADD/REMOVE VOCABULARIES (if desired at your
local institution):
# A) Find and replace on this string:
fast|dtict|unbist|scgdst|bisacsh|netc|lctgm|local|homoit
# B) Add/remove vocabulary codes as desired
# C) Replace all occurrences of the string (so each stanza will be
updated at once)
###Option Two: TO MAKE THIS RULE DISPLAY SEPARATELY FROM
LCSH SUBJECTS
# A) Find and replace on this string: create pnx."display"."subject"
# B) Replace with string: create pnx."display"."lds47" (so each stanza
will be updated at once)
  when
    MARC:"600" has any "a-z" AND
    MARC:"600".ind"2" equals "7" AND
    MARC:"600"."2" match
"fast|dtict|unbist|scgdst|bisacsh|netc|lctgm|local|homoit" AND NOT
    MARC:"600"."9" match ".*"
  then
```

Close Save

Click Save on the next screen and then Apply rules on the next.

### **Adding NRSB Search and Facet rules for Fields 31-50:**

Similar to local display fields, search and facet rules within fields 31-50 are not managed in the NZ and must be taken care of by each member institution. This is two-step process. 1) Each institution needs to go to **Configuration > Discovery > Other > Local Fields using Search and Facet Normalization Rules** and activate the local field for search and facet usage.

|   |                |                 |
|---|----------------|-----------------|
| 4 | Local Field 48 | blake.galbreath |
| 5 | Local Field 50 | blake.galbreath |
| 6 | Local Field 52 | Network         |
| 7 | Local Field 53 | Network         |

2) Each institution needs to copy and paste the search/facet rule from the NRSB Github Repository into the MARC21 normalization rule for search and facet (under Manage Display and Local Fields) and check the box “Enable field for facet.”

Field to edit\* local\_field\_48      Display label\* Original Language

Local field details

Enable field for search       Use the parallel Local Field 01/50 from the Dublin Core record

Enable field for facet       Use full text links for indexing

Use Translations

MARC21 Normalization Rules

| ↕Normalization rule                              | ↕Updated by     | ▲Updated date          |     |
|--|-----------------|------------------------|-----|
| 1 MARC21 normalization rule for display          | blake.galbreath | 01/21/2023 01:51:48 PM | ... |
| 2 MARC21 normalization rule for search and facet | blake.galbreath | 01/21/2023 01:49:47 PM | ... |

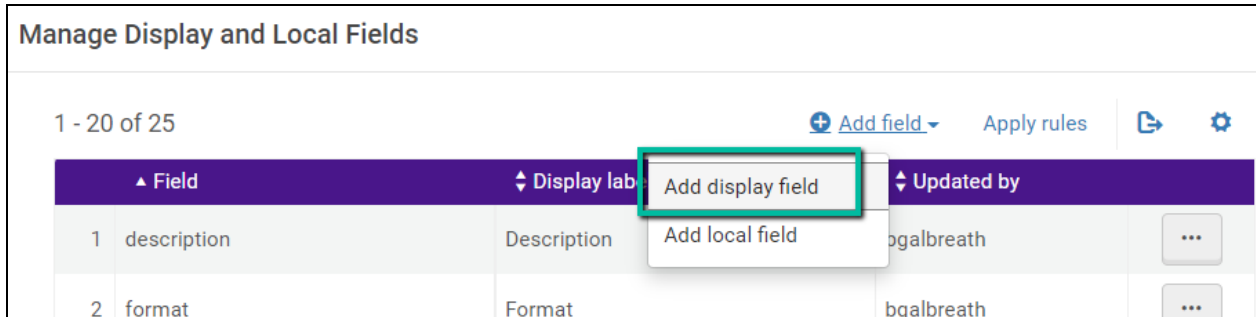
Save and apply changes.

### Editing OTB Display Fields:

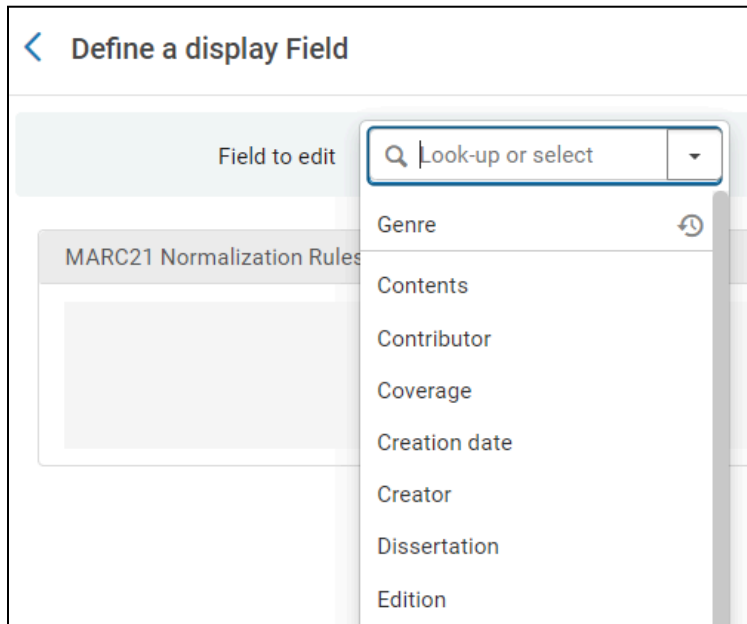
In some cases, the NRSB found that metadata should be added to certain out-of-the-box (OTB) display fields. In other cases, metadata needed to be removed from OTB fields so that it could be displayed in a local display field instead. In those cases, the NRSB cannot “push” the changes out to member IZs from the NZ. Members will all need to apply those changes locally in their IZs.

A list of the OTB display field edits made by the NRSB can be found [here](#).

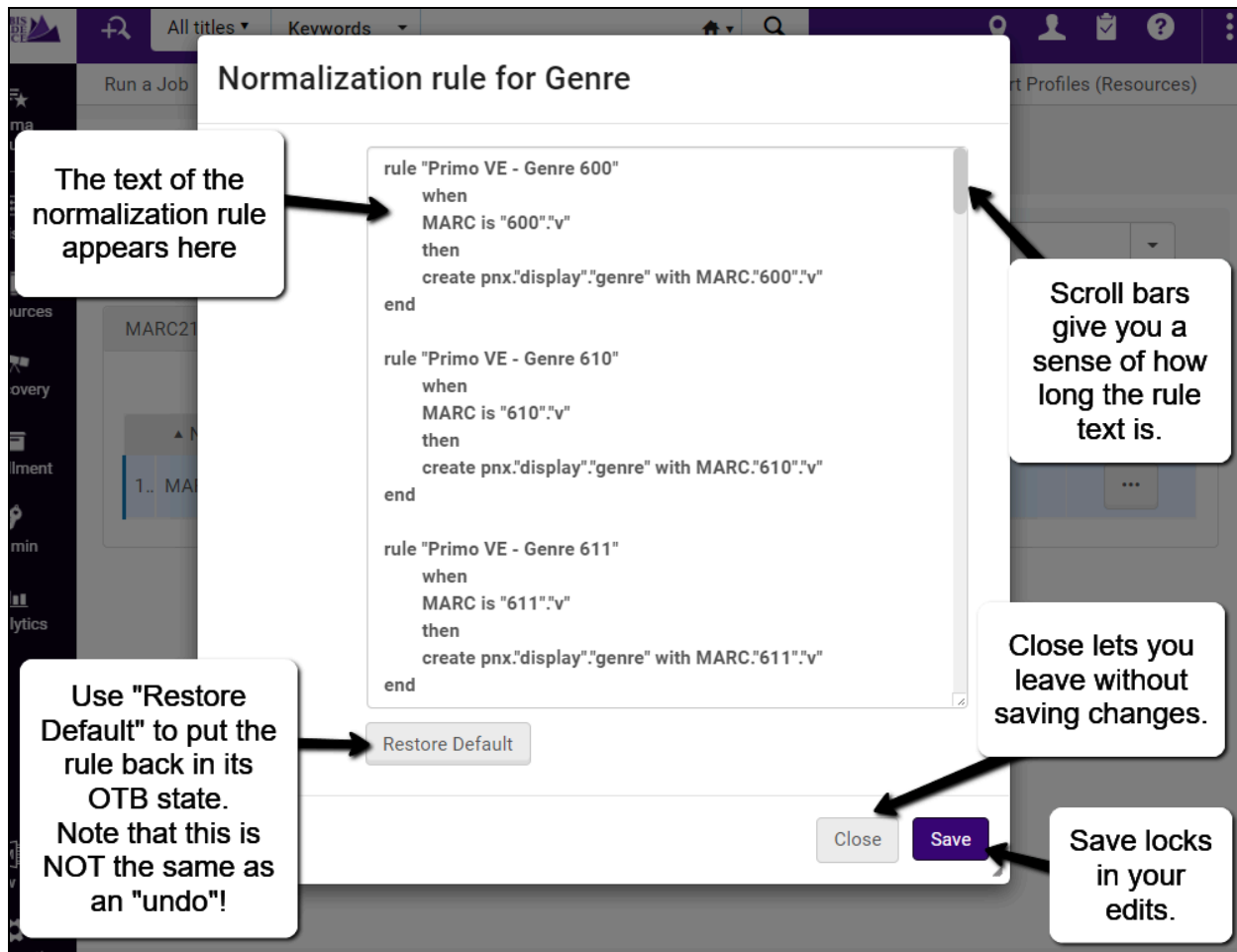
Once you have the code for a revised OTB field ready, navigate to **Discovery > Display Configuration > Manage Display and Local Fields**. Click **Add Field** and select the **Add display field** option.



On the Define a Display Field page, open the **Field to edit** drop down and select the desired field.



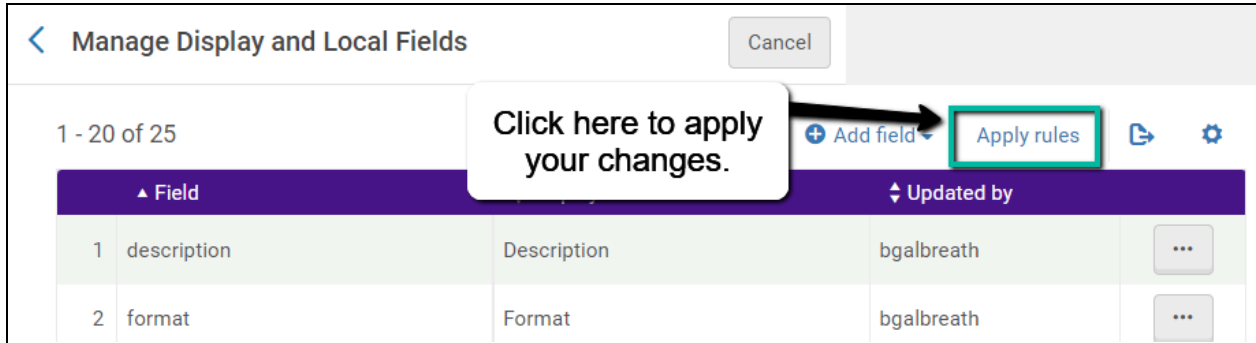
Click the action button to **Edit** the MARC 21 Normalization Rule for Display that appears. The Normalization Rule pop-up window will appear. The pop-up contains the normalization rule for the selected field in plain text.



Click to place your cursor inside the window with the rule text. Press **CTRL+A** to select all of the rule text. Then press **Delete** to empty the text box. Now open the NRSB-provided replacement rule text in GitHub or a plain text editor like Notepad or Notepad ++. Select the entire text of the NRSB rule and press **CTRL+C** to copy it. Click once more in the Normalization rule text area in Primo VE and press **CTRL+V** to paste the NRSB's text in place. Click **Save**.

If there's any problem with the rule text, you'll get an error message when you click Save. The messages themselves are too short to be useful, and since the NRSB has tested their rule text, the easiest way to deal with this is to empty out the text window again using **CTRL+A + Delete**, and then try re-copying and re-pasting the NRSB's rule text. Make sure that you have the full text of the desired rule included in the data you copy/paste, including any line breaks at the beginning and/or end.

Once you've successfully saved the NRSB rule text into the field, the pop-up closes, and returns you to the Manage Display and Local Fields Page. The last step needed is to click on the **Apply Rules** link at the top of the list of fields.



Once you've applied the rule changes for a display field, those changes should appear immediately in the Primo VE front end if you're using that field in one of your views. See the preceding section for how to turn on display fields in a view.

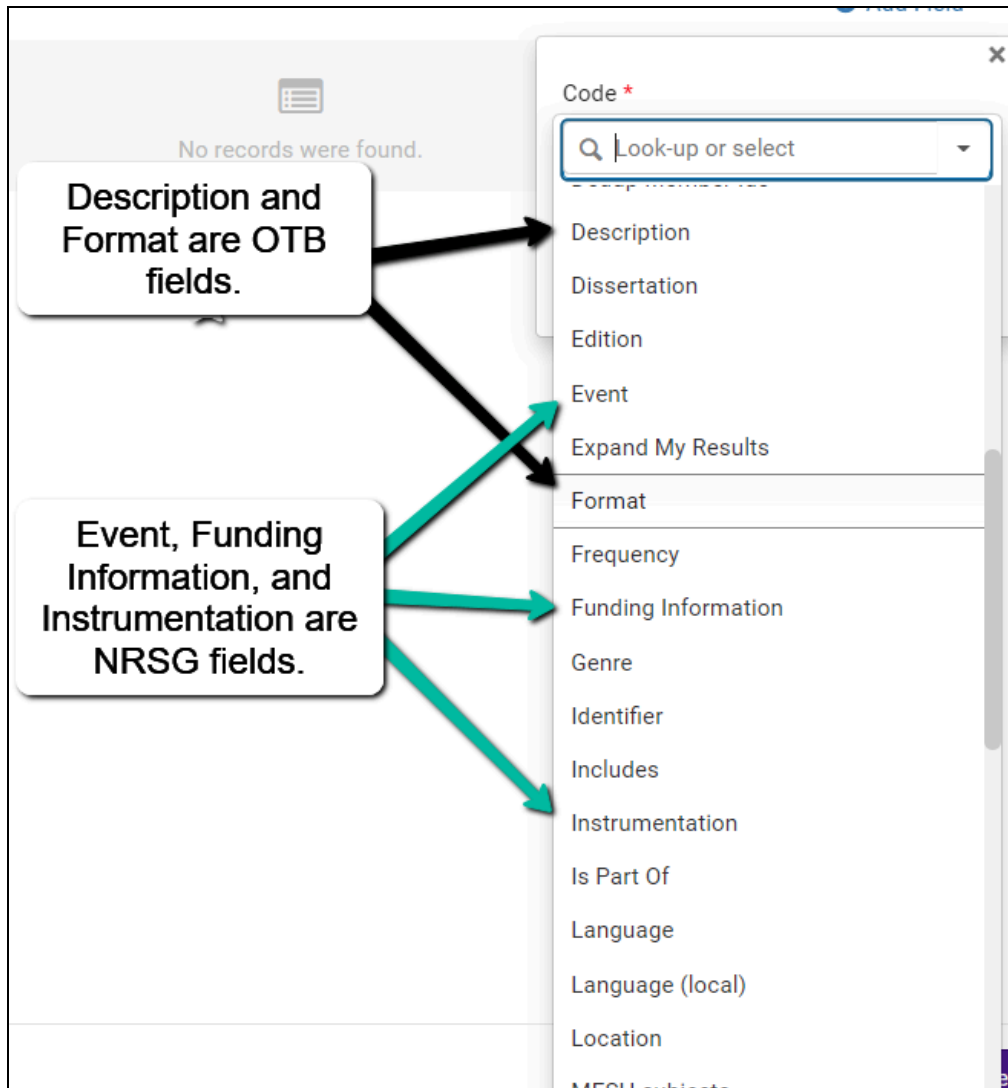
### Pairing OTB and NRSNG fields for display

In some cases, the NRSNG will recommend that you make edits to one or more OTB display fields and then pair those fields with an NRSNG-distributed local display field into one combined field for display in the Primo VE front end. Two steps are needed to perform the recommended configuration for these "combined" fields:

First, members will need to apply the NRSNG's recommended edits to the OTB field(s) involved, using the process described in the [prior section of this document](#).

Then, members should navigate to **Discovery > Display Configuration > Configure Views** and choose a view to edit. Then navigate to the **Full Record Services tab > Record Details** and click the Action button to configure the details.

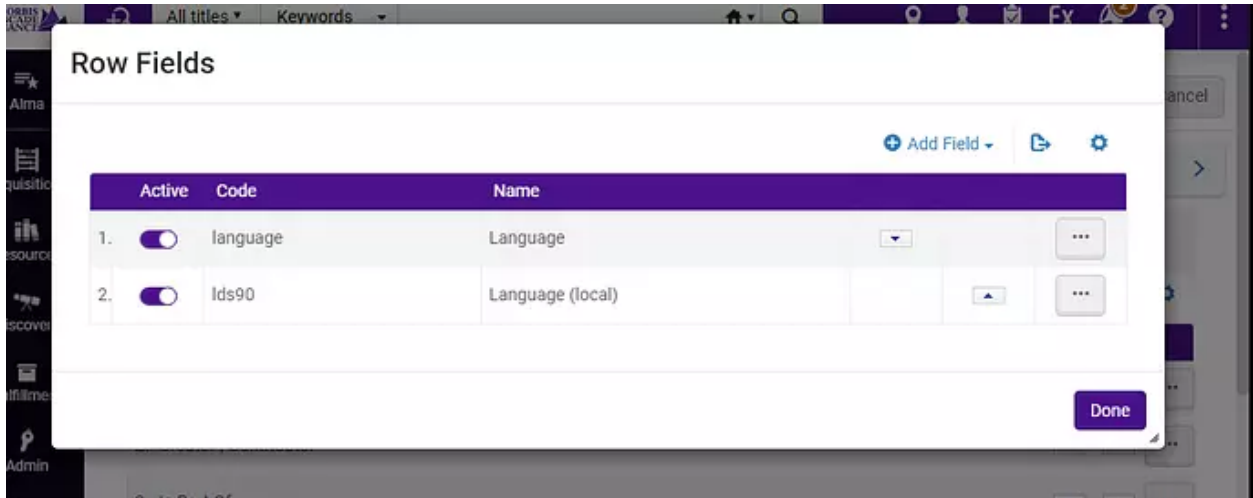
If the OTB field you need to add isn't already listed, click on the **Add Field** link at the top of the list. In the Row Fields pop-up that appears, click on the **Add Field** link. Select the display field you wish to add to your view from the drop-down list.



\*Pro Tip\*: The list contains the Display Label of each field - NOT its local field number. To save time, check the list at **Discovery > Display Configuration > Manage Display and Local Fields** to make a note of which Display Label you're looking for before you start your view configuration.

Once you select a field, it will display in the row fields pop-up, where its local field number and display label are shown. Click **Add Field** to add another field to this list. From the drop-down list, select either another OTB field specified by the NRSG or the specified NRSG-developed local display field.

You can reorder the fields as desired. The VE front end will display the label of the field that comes first in this list, so you'll want to ensure that the first field is one with the label you want users to see in Primo.



Once you're done adding fields to the display line and ordering them, click **Done**.

At present, the following fields are the "paired" fields from the NRSG (some not yet distributed to members):

| NRSG Field                                   | Paired with OTB Field(s)     |
|--|------------------------------|
| local_field_78 Genre                         | Genre                        |
| local_field_79 Related Works and Collections | Related Titles, Related Work |
| local_field_80 Included Works                | Includes                     |
| local_field_90 Language (local)              | Language                     |

**Display Fields for Local Data Fields (MARC 59X, 69X, 9XX)**

In general, the NRSG's centrally-configured display, search, and facet rules will not handle data in MARC tags set aside for local data. Typically, these fields include the MARC 59X, 69X, and 9XX. However, experience has shown that many members DO want these fields to be displayed and searchable in Primo.

In cases where a local MARC tag appears with other "global" MARC tags in a PBO display field, the NRSG has incorporated the local tag into the centrally-developed rule (e.g., 955 and 960 are present in the "Related Works and Collections" field).

However, in cases where a Primo PBO field consisted entirely of local MARC tags (e.g., Local Titles in PBO), the NRSB has not added those fields to the centrally-developed rules. Instead, they encourage members to create their own local display fields for this data using one of the following two methods:

### Method 1: MARC21 Fields

Members may wish to use the VE “MARC21 Fields” method for defining a local display/search/facet field for MARC tags for local data. This method, which is documented in detail as the “Bibliographic Field Method” at [https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/050Display\\_Configuration/040Configuring\\_Local\\_Display\\_and\\_Search\\_Fields\\_for\\_Prime\\_VE#Adding\\_a\\_Local\\_Field](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/040Configuring_Local_Display_and_Search_Fields_for_Prime_VE#Adding_a_Local_Field), allows for fast field setup, but comes with a couple of caveats to bear in mind:

- You cannot map the field conditionally based on its contents or the contents of another field.
- You cannot modify or exclude content in the field for display purposes.

Essentially, these caveats result in an “all or nothing” approach to the display of the local data.

### Method 2: NRSB-provided templates or locally-developed norm rules

Since the MARC21 Fields method may not be appropriate for all local data needs, the NRSB has developed template rules that can be used to create local display fields in the IZ that use normalization rules to control display and search/facet functionality. These rules can be found in the [NRSB’s GitHub repository](#) in the [Optional Code subdirectory](#). Members may also wish to develop their own custom normalization rules to handle the display, search, and faceting of MARC tags for local data.

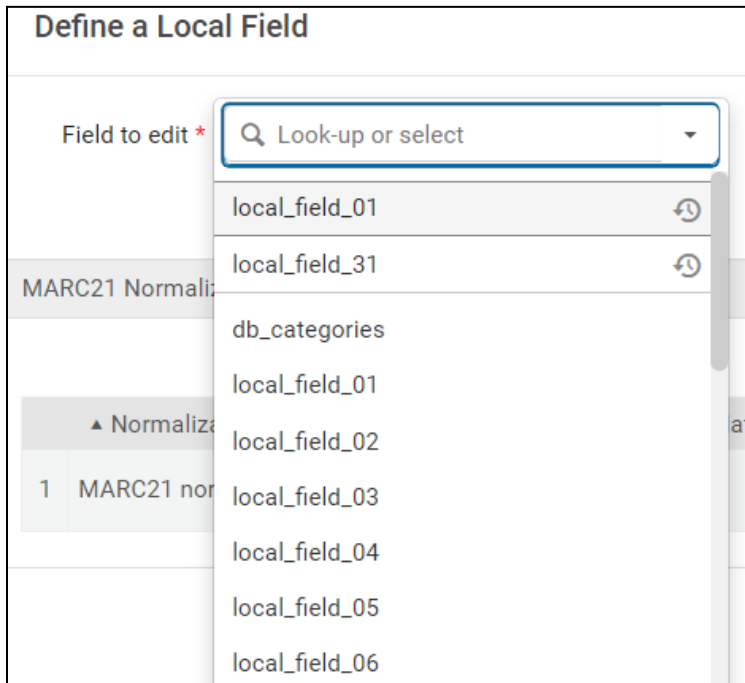
Once you have the template code for the desired local display field ready, navigate to **Discovery > Display Configuration > Manage Display and Local Fields**. Click **Add Field** and select the **Add local field** option.



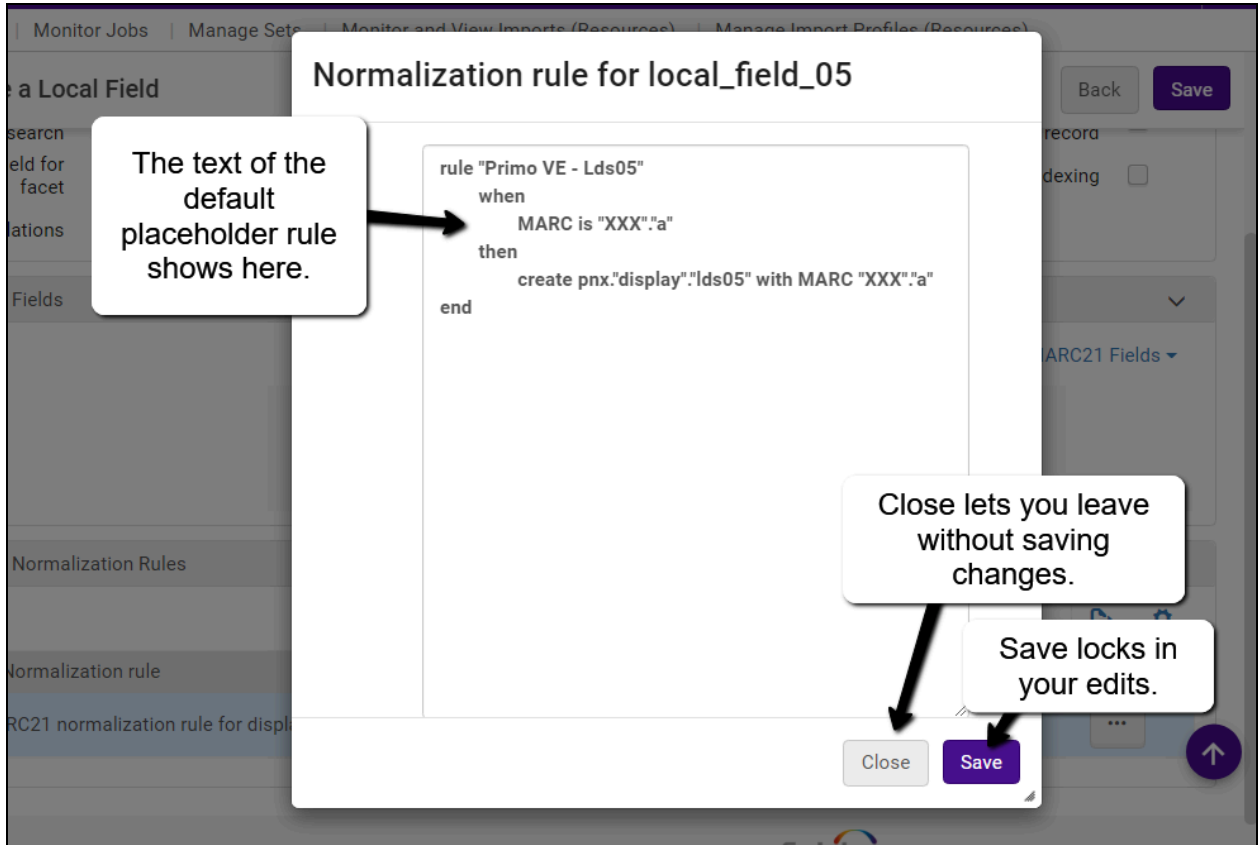
On the Define a Display Field page, open the **Field to edit** drop down and select the desired local field number. Before choosing a field number, check the [Alliance Search and Facet Norm Rule Coordination spreadsheet](#) if you plan to use search and/or facet normalization rules for the



field. For instance, if you are adding a Local Notes field, use local\_field\_02, since other members are using that field for their Local Notes data.



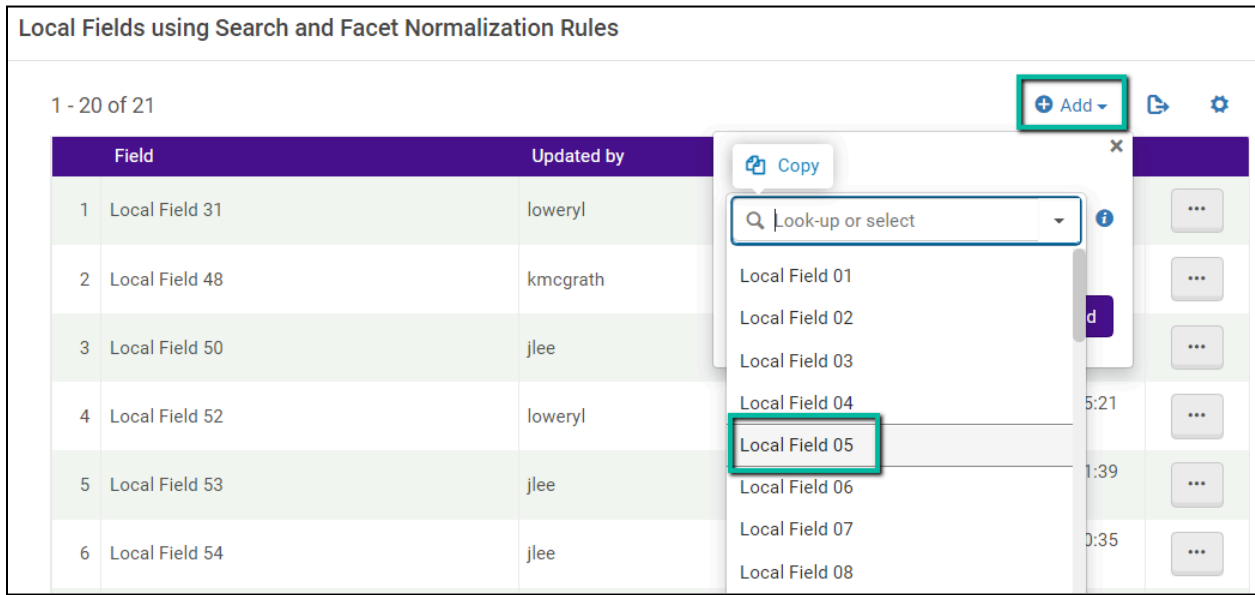
Start by giving the field a display label that will make sense to users in Primo. Then, in the “MARC21 Normalization Rules” section, click the action button to **Edit** the MARC 21 Normalization Rule for Display that appears. The Normalization Rule pop-up window will appear. The pop-up contains the default placeholder normalization rule for the local field in plain text.



Click to place your cursor inside the window with the rule text. Press **CTRL+A** to select all of the rule text. Then press **Delete** to empty the text box. Now open the NRSB-provided display rule template in GitHub. Select the entire text of the NRSB rule and press **CTRL+C** to copy it. Open a plain text editor like Notepad or Notepad ++, and press **CTRL+V** to paste the template rule into that editor. Use find and replace (usually **CTRL+H**) to replace all of the "XX" placeholders in the template rule with your specified local field number ("05" in our example). With the field numbers added to the template, use **CTRL+A** > **CTRL+C** to copy the rule. Back in Primo VE, click once in the Normalization rule text area and press **CTRL+V** to paste the rule text in place. Click **Save**.

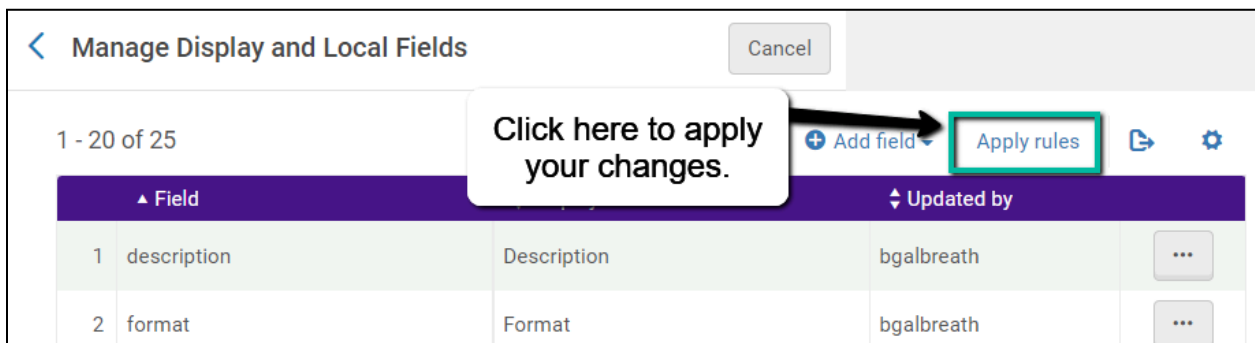
If there's any problem with the rule text, you'll get an error message when you click Save. The messages themselves are usually too short to be useful, and since the NRSB has tested their rule text, the easiest way to deal with this is to empty out the text window again using **CTRL+A** + **Delete**, and then try re-copying and re-pasting the rule text. Make sure that your "XX" placeholders have all been replaced with the correct field number, and that you have the full text of the desired rule included in the data you copy/paste, including any line breaks at the beginning and/or end.

Once you've successfully saved the rule text into the field, the pop-up closes, and returns you to the Manage Display and Local Fields Page. If the NRSG supplied a search/facet rule for this field as well, navigate to **Configuration > Discovery > Other > Local Fields Using Search and Facet Normalization Rules**. Here, click the **Add** link at the top right of the list. From the drop-down menu, select the desired local field number and click **Add new local field**. Your local field will be added to the table, and there's no need to save anything.



Now navigate back to **Discovery > Display Configuration > Manage Display and Local Fields**. Open your local field for editing with the **Edit** item on the action button. Now in the "MARC21 Normalization Rules" section, click the action button to **Edit** the MARC 21 Normalization Rule for Search/Facet that appears. Follow the same procedure above to copy the template search/facet rule from GitHub, replace the "XX" placeholders with your field number, and apply it to the VE display field. Click **Save** to lock in your changes.

The last step needed is to click on the **Apply Rules** link at the top of the list of fields.



Once you've applied the rule changes for a display field, those changes should appear immediately in the Primo VE front end if you're using that field in one of your views. See the [instructions in the first section of this document](#) for how to turn on display fields in a view.

