

# Consortial Migration of Primo VE Norm Rules

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# Overview

- Background and migration
- Primo (VE) normalization rules
- Facets in Primo VE
- Challenges
- Assessment of rule distribution
- Next steps

# Orbis Cascade Alliance



- Pacific Northwest consortium of 38 academic libraries in Oregon, Washington, and Idaho
- Migrated from Primo BO to Primo VE in June 2022
- Normalization Rules Standing Group (NRSG)
  - Consists of 6 institutional members & 1 Alliance program manager
  - Oversees the creation and dissemination of norm rules
  - Recreated over 70 norm rules for display, search, and facet

# Primo VE Migration Timeline

- Pre-migration (Dec. 2020 – Oct. 2021)
  - Converted PBO rule.xml file from Ex Libris to Excel file
  - Tested norm rules in WSU Alma production & premium sandbox
- Migration (Oct. 2021 - June 2022)
  - Implemented norm rules in Alliance Alma production
  - Set up NRSR GitHub Repository & NR Migration Trello Board
- Go-Live (June 2022)
  - Set up [Alliance GitHub Repository](#)
  - Provide [Guide to Display and Local Fields in VE for Alliance Members](#)

# Primo Normalization Rules

The process that transforms MARC data into PNX (Primo Normalization XML) data and formats it for search, facet, and display in Primo.

```
100 1#$aVivaldi, Antonio, $d1678-1741, $ecomposer.
240 10$aCimento dell'armonia e dell'inventione. $nN. 1-4
264 #1$aLondon : $bEditions de l'Oiseau-Lyre, $c@1984.
245 13$aLe quattro stagioni = $bThe four seasons / $cVivaldi.
336 ##$aperformed music $bprm $2rdacontent
337 ##$aaudio $bs $2rdamedia
338 ##$aaudio disc $bsd $2rdacarrier
382 01$bviolin $n1 $astring orchestra $el $r1 $t1 $2lcmt
340 ##$b4 3/4 in. $3audio disc.
300 ##$a1 audio disc : $bdigital, stereo ; $c4 3/4 in.
344 ##$adigital $boptical $gstereo $2rda
347 ##$aaudio file $bCD audio $2rda
306 ##$a001000 $a001100 $a000900
490 1#$aFlorilegium
511 0#$aChristopher Hiron (1st work), John Holloway (2nd work)
```



<b>Title</b>	Le quattro stagioni = The four seasons
<b>Author</b>	Vivaldi, Antonio, 1678-1741, composer. > Hirons, Christopher, instrumentalist. > Holloway, John, 1948- instrumentalist. > Bury, Alison, instrumentalist. > Mackintosh, Catherine, instrumentalist. > Hogwood, Christopher, conductor. > Academy of Ancient Music (1973- ), instrumentalist. >
<b>Subjects</b>	Concertos (Violin with string orchestra) > Seasons -- Songs and music >
<b>Genre</b>	Songs and music > Concertos >
<b>Description</b>	Concertos for violin and string orchestra. Performed on authentic instruments. Compact disc. Issued also as analog disc: 410 126-1.

# Primo VE Normalization Rules

- Out of the Box Rules
  - [Mapping to the Display, Facets, and Search Sections in the Primo VE Record](#)
  - Can edit the display fields, but not the search and facet fields
- Local Fields 1-100
  - Used to extend search queries, filter search results with facets, and display additional data in the record's brief and full displays
  - Local fields 51-100 are reserved for NZ distribution
  - Local fields 1-50 are reserved for member institutions

# Norm Rule Example: Audience

```
rule "Primo VE - Lds98_008_22_b"  
  when  
    MARC.control."008"(22-23) equals "b" AND NOT  
    MARC.control."LDR"(6-7) matches "e|f|p" AND NOT  
    MARC.control."LDR"(6-8) matches "ab|ai|as" AND NOT  
    MARC is "385"  
  then  
    set TEMP"1" to position("008",22-23)  
    add prefix (TEMP"1";"School children,Children")  
    remove string (TEMP"1";"b")  
    create pnx."display"."lds98" with TEMP"1"  
end
```

# Norm Rule Example: Genre (Local)

```
rule "Primo VE - Lds78 008/34"  
#biography  
  when  
    (MARC.control."008"(34-35) equals "a" OR  
     MARC.control."008"(34-35) equals "b" OR  
     MARC.control."008"(34-35) equals "c") AND  
     MARC.control."LDR"(6-8) matches "aa|ac|ad|am"  
  then  
    set TEMP"1" to position("008",34-35)  
    add prefix (TEMP"1","$$Tgenre_008_Biog_")  
    add suffix (TEMP"1","$$")  
    create pnx."display"."lds78" with TEMP"1"  
end
```



# Local Field Translate Table (Mapping Table)

Code	Description
genre_008_Biog_a	Autobiographies
genre_008_Biog_b	Biographies
genre_008_Biog_c	Biographies
genre_008_LitTxtSR_a	Autobiographies
genre_008_LitTxtSR_b	Biographies
genre_008_LitTxtSR_c	Conference papers and proceeding:
genre_008_LitTxtSR_d	Drama
genre_008_LitTxtSR_e	Essays

# Alliance Primo VE: Facets


- Availability ▾
- Topic ▾
- Creator ▾
- Institution ▾
- Resource Type ▾
- Creation Date ▾
- Language ▾
- MESH ▾
- Musical Key ▾
- Music: Medium of Performance ▾
- Music: Number of Performers ▾
- Music: Medium of Performance Statement ▾
- Numeric Designation of Musical Work ▾


- Country of Production ▾
- Data Source ▾
- Composer ▾
- Director ▾
- Performer ▾
- Creator Demographic ▾
- Associated Place ▾
- Audience ▾
- Original Language ▾
- Genre Terms ▾
- MeSH Genre ▾
- NLM Classification ▾
- Date or Period of Creation ▾

# Creator vs. Director/Performer/Composer

Search: Clint Eastwood or author: Clint Eastwood

## Results List

 PRINT BOOK  
**Clint Eastwood**  
Cole, Gerald.  
©1983  
[Check for available services >](#)

 PRINT BOOK  
**Clint Eastwood**  
Bénoliel, Bernard.  
©2010  
[Check for available services >](#)

## Creator ^

Eastwood Clint (242)  
Warner Home Video Firm (119)  
Malpaso Company (118)

## Director ^

Eastwood, Clint, 1930- (71)  
Leone, Sergio, 1929-1989 (16)  
Siegel, Don, 1912-1991 (8)  
Diamond, Neil (Filmmaker) (6)

## Performer ^

Eastwood, Clint, 1930- (87)  
Freeman, Morgan (14)  
Volonté, Gian Maria, 1933-1994 (11)  
Hackman, Gene (9)


## Composer ^


Morricone, Ennio (19)  
Niehaus, Lennie (18)  
Eastwood, Clint, 1930- (14)  
Schifrin, Lalo (11)


# Genre vs. Subject Heading

- Search: drama

## Results List

 PRINT BOOK  
**Drama**  
[compiled by] Jeffrey D. Hoeper, James H. Pickering, I  
©1994  
[Check for available services >](#)

 PRINT BOOK  
**Drama**  
Dukes, Ashley, 1885-1959.  
1926  
[Check for available services >](#)

 PRINT BOOK  
**Drama**  
Telgemeier, Raina, author, illustrator.  
2018  
[Check for available services >](#)

## Topic ^

- Drama** (34,991)
- 1900 1999** (18,589)
- Feature Films** (17,579)
- Motion Pictures** (14,629)
- English Drama** (13,959)
- United States** (12,561)
- Theater** (11,736)
- Man Woman Relationships** (10,543)
- Man Woman Relationships Drama** (8,052)

## Genre Terms ^

- Drama** (118,738)
- Feature films** (48,558)
- Criticism, interpretation, etc** (33,832)
- Fiction films** (30,768)
- History** (23,942)
- Video recordings for the hearing impaired** (21,594)
- Film adaptations** (13,680)
- Comedy films** (9,105)
- Motion pictures** (9,099)
- Comedy plays** (5,085)

# Audience vs. Subject Heading

- Search: juvenile

## Audience ^

Children (179,377)  
School children,Children (12,909)  
Preteens,Children (12,336)  
Teenagers (6,481)  
Preschool children,Children (3,254)  
School children (3,225)  
Preteens (1,761)  
Adults (1,279)  
General audience (921)  
Juvenile (874)

Middle school students (802)  
Kindergartners (739)  
Third grade students (708)  
First grade students (704)  
Second grade students (693)  
Sixth grade students (615)  
Seventh grade students (611)  
Eighth grade students (601)  
Fifth grade students (600)  
Fourth grade students (595)

## Topic ^

United States (18,051)  
Childrens Stories (7,289)  
Friendship (7,195)  
Conduct Of Life (7,098)  
Families (6,659)  
Friendship Juvenile Fiction (6,647)  
Fairy Tales (6,464)  
Animals (6,310)  
Science Fiction (6,164)  
Childrens Poetry (6,117)  
Amitié Romans Nouvelles Etc Pour La Jeunesse (6,079)

Friendship Fiction (5,452)  
Childrens Literature (5,145)  
Histoires Pour Enfants (5,105)  
Schools Fiction (4,855)  
Schools (4,619)  
Picture Books For Children (4,520)  
Juvenile Delinquency (4,499)  
Conduct Of Life Juvenile Fiction (4,438)  
Families Juvenile Fiction (4,274)

# Challenges

- Balance of centralization vs. autonomy
  - Local Fields 51-100: centrally pushed and require no intervention by members
  - Edited OTB and Local Fields 31-50: centrally hosted and require members to copy & paste rules from [Alliance GitHub Repository](#)
  - Local Fields 1-30: locally created by members
- Scale of project: migrated 70+ norm rules
- Lack of ability to edit OTB rules
- Drools text-based language

# Display Fields Used in PBO & VE

Primo Field Label	PBO to VE	Primo Field Label	PBO to VE
MeSH Genre	6 → 4		
Date or Period of Creation	12 → 8	Musical Key	13 → 12
Country of Production	13 → 8	Music: Medium of Performance	16 → 13
Associated Place	9 → 9	Audience	10 → 14
Creator Demographic	11 → 10	Original Language	13 → 18
Numeric Designation of Work	14 → 10	Genre	20 → 34

# Facets Used in PBO & VE

No of Facets	Primo Field Label	PBO to VE
0	Creator Demographic, Audience, Date or Period of Creation, Associated Place	Audience (4 → 0)
1	MeSH Genre, Country of Production, Music: Medium of Performance, Music: Medium of Performance Statement, Numeric Designation of Work, Original Language	Medium of Performance (8 → 1) Medium of Performance Statement (6 → 1)
2	Performer, Director, Composer, NLM Classification	Performer (6 → 2) Composer (7 → 2)
12	Genre	Genre (9 → 12)



# Outreach to Member Institutions

- Receive feedback and fulfill requests via [Trello Board](#)
- Provide demonstrations in the Alliance open calls
  - Keep up-to-date via the [NRSB Changelog](#)
  - Related works and collections
  - Genre
  - Alternative vocabularies
  - Identifier



# Looking Ahead

- Develop a standardized approach to rules by incorporating templated rules
- Work with other standing groups to help incorporate cataloging standards
- Analyze all active views of members
- Revisit resource types



## Further Resources

- Lee, Junghae & Blake Galbreath. “Orbis Cascade Alliance’s Migration of Faceted Vocabularies to Primo VE.” *Cataloging & Classification Quarterly*, DOI: 10.1080/01639374.2023.2197897
- [Orbis Cascade Alliance Primo VE Instance](#)
- [Working with NRSB Local Display Fields in Primo VE](#)

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**Questions?**