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



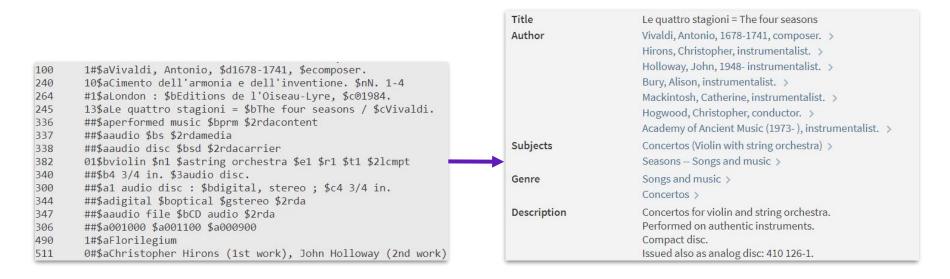
- Pacific Northwest consortium of 38 academic libraries in Oregon, Washington, and Idaho
- Migrated from Primo BO to Primo VE in June 2022
- Normalization Rules Standing Group (NRSG)
 - Consists of 6 institutional members & 1 Alliance program manager
 - Oversees the creation and dissemination of norm 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 NRSG GitHub Repository & NR Migration Trello Board
- Go-Live (June 2022)
 - Set up <u>Alliance GitHub Repository</u>
 - Provide <u>Guide to Display and Local Fields in VE for Alliance Members</u>

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.



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
```

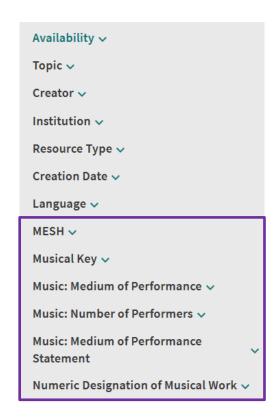
Norm Rule Example: Genre (Local)

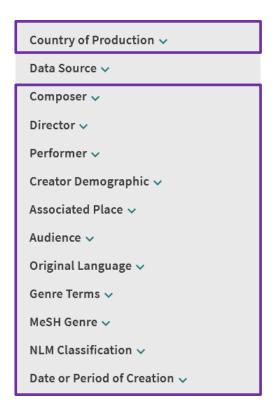
```
rule "Primo VE - Lds78 008/34"
#biography
  when
    (MARC.control."008"(34-35) equals "a" OR
    MARC.control."008"(34-35) equals "b" OR
    MARC.control."008"(34-35) equals "c") AND
    MARC.control."LDR"(6-8) matches "aa|ac|ad|am"
  then
    set TEMP"1" to position("008",34-35)
    add prefix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

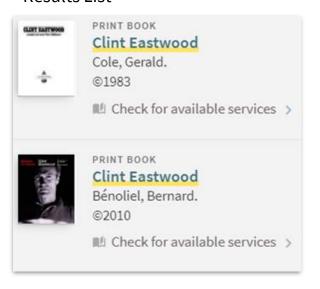


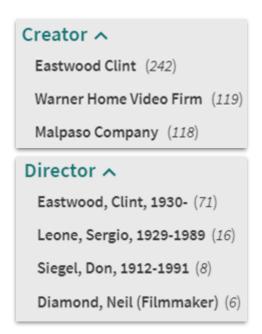


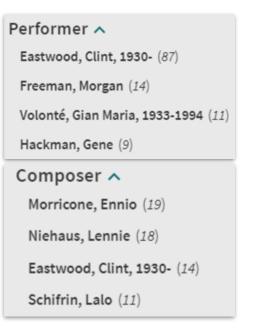
Creator vs. Director/Performer/Composer

Search: Clint Eastwood or author: Clint Eastwood

Results List



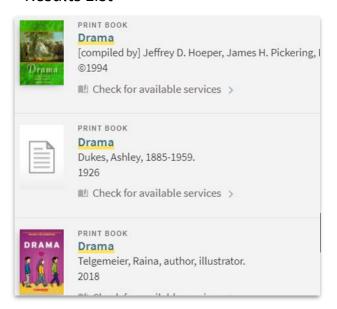




Genre vs. Subject Heading

• Search: drama

Results List





```
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 (6,079) La Jeunesse 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 <u>Alliance GitHub Repository</u>
 - 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 <u>Trello Board</u>
- Provide demonstrations in the Alliance open calls
 - Keep up-to-date via the <u>NRSG Changelog</u>
 - 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 NRSG Local Display Fields in Primo VE

Acknowledgement: Blake Galbreath, Core Services Librarian, Washington State University

Questions?