

Primo Marc Advisory Task Force Report

Introduction

The Primo MARC Advisory Group seeks to define additional fields appropriate for the out-of-the-box (OTB) settings for display of MARC tags, indicators, and subfield codes. These elements determine how MARC data is displayed and utilized in the discovery environment.

Many Primo customers have customised numerous normalisation rules because some of the MARC tags currently in use have not been included in the default OTB settings. While these OTB settings account for many of the commonly used MARC tags, institutions that provide access to special collections often rely on less commonly used MARC tags and subfields to describe their unique collections.

Additional MARC tags in the OTB settings should help provide improved access to these materials. For example, the 502 dissertation note needs to be included as its own note. Another example is the vernacular paired fields. Some were included, but others were not, such as the parallel subjects and corporate authors that should be added. Ideally, these display settings would include configuration for all parallel fields in the MARC record.

The primary objective is to define the display data elements of the PNX records, and determine how the MARC tags and subfields should be customized for new Primo customers.

We hope Ex Libris will use these recommendations as an ongoing process to further develop the Primo OTB interface for onboarding new library sites.

A list of recommendations can be found below.

Recommendations

The following is a list of recommendations to be reviewed and updated.

- A. By default, subfield \$u should display as a hyperlink. This option will apply to any MARC tag in the bibliographic and holdings record, and would not require further handling. Each hyperlinked subfield should include an option to suppress for display.

- B. Use a hypertext link in the display section using subfield \$Q (from the PNX record), with a preference for names and titles to display.

For names and titles, subfields \$3, \$i, \$e (and for X11 \$j) should display but not be included in the \$\$Q of the PNx that generates the search that the hyperlink performs. Subfields \$3, \$i, and \$e should also be excluded from the browse search for names and titles.

Series statements should display, but not include subfields \$3 and \$v or \$x in the \$\$Q of the PNx that generates the search that the hyperlink performs. \$3 and \$x should also be excluded from the browse search for series

For display purposes, subfield \$3 should come first, followed by a semicolon, then subfield \$i followed by a semicolon,

Example

\$\$i Musical setting of (work): \$\$a British Library. \$\$k Manuscript. \$\$n Arundel 384.

\$\$3 viewing copy. \$\$a 1 videodisc of 1 (VCD) (Ca. 30 min.) : \$\$b sd., col. ; \$\$c 4 3/4 in.

- C. The display of 880 parallel fields should be treated the same way as the romanized fields they represent. It is problematic to define them separately, as it doubles the number of rules needed. Therefore, the recommendation is for 880 fields to be handled automatically and defined the same as their corresponding pair. For example, if writing a rule for the display of 710 fields, the corresponding 880 field would be automatically handled without needing to write a separate rule for it.
- D. At the moment, Primo VE displays a few note fields that include the 500 (general note), 502 (dissertation note), 505 (contents note), 507 (graphic scale note), and 520 (summary note). Also, the 880 alternative script fields linked to these 5XX fields by a subfield \$6 are currently displayed. The recommendation is to add more 5XX note fields for display in the OTB configuration than are currently available. (See item E. for listing of additional 5XX fields.)
- E. Additional fields are lacking from the OTB configuration that would enhance a user's understanding of their search results. We recommend including the display of the following MARC tags (plus any linked 880 fields):
- 362
 - 370
 - 382 (also needs punctuation)
 - 385 (also needs punctuation)
 - 662
 - 720
 - 730

- 751
- 752
- Numerous 76X-78X fields are missing, they should ALL display, with the appropriate label based on the MARC tag and indicator:
<http://www.loc.gov/marc/bibliographic/bd76x78x.html>
- Numerous 5XX fields are missing, they should ALL display, with the appropriate label, unless there is a privacy indicator:
<http://www.loc.gov/marc/bibliographic/bd5xx.html>

Note fields

- 504 \$a - Bibliography, etc. Note
- 506 \$a, \$b, \$c, \$e, \$f - Restrictions on Access Note – (this is often used to note if a resource is Open Access)
- 508 \$a - Creation/Production Credits Note – (used to credit production team, directors etc. in films/TV and musical productions)
- 511 \$a - Participant or Performer Note – (used to credit cast members in film/TV and musical performances)
- 530 \$a, \$b, \$c, \$u - Additional Physical Form available Note – (NB. could be misleading if users assume that the library holds this alternative form)
- 532 - Accessibility Note
- 533 \$a, \$b, \$c, \$d, \$e - Reproduction Note – (useful for giving details of original physical items that have been digitised)
- 538 \$a, \$i - System Details Note – (useful for e-resources or computer files with system requirements (i.e. not just accessed on the internet))
- 540 \$a, \$f, \$g, \$q, \$2 - Terms governing use and reproduction
- 546 \$a - Language Note – (more detail of languages than covered in 041 and 008/35-37)
- 555 Finding aids / indexes subfields \$a, \$b, \$c, \$d, \$u (preferably, subfields \$a, \$b, \$c, and \$d is the linked text for subfield \$u)

Notes for Special Collections materials:

- 561 \$a - Ownership and Custodial History
- 562 \$a, \$b, \$c, \$d - Copy and Version Identification Note
- 563 \$a - Binding Information
- 585 \$a - Exhibitions Note

- F. We recommend that an 'option' to display each 800, 810, 811 and/or 830 series statement be available in Primo VE. The display of the 490 field should only display if the first indicator is 0 and desired by the institution

- G. A two-step procedure for adding a field also requires an entry in Details of Full Record Service found in the Configure Views menu. This is consistent with the practice in BO. We are not including this item in the recommendation.

- H. Within the Details of the Full Record Services configuration the up/down arrows are used to arrange the order of the fields. This becomes difficult to manage when adding a large number of customized fields. An option to use drag and drop for ordering of fields would be more efficient.

- I. If LDR/18 = c, Primo should add medial punctuation (Harvard can share rules for relevant fields). Use of ISBD punctuation is optional in RDA descriptive cataloguing.

- J. We recommend a limit be applied to the number of 6XX and 700/710/711 fields that appear in the Primo front end brief results, in association with a single item.

Summary

It is our hope that an updated OTB MARC display configuration will improve the user experience for new Primo libraries. We have described a number of changes to the OTB configuration. Some can be applied uniformly across multiple fields. Additional MARC tags are being recommended for inclusion, and we have identified MARC tags that should not be included. We also reviewed the subfields within the MARC tags. Some subfields are being recommended for display while others should be suppressed from display.

We understand that this is the first step in an ongoing process to help improve the implementation experience for new Primo sites.

Respectfully submitted,

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With thanks to these invaluable contributors:

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