

Discovery - Primo VE

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Discovery - Primo VE Configuration

Secondary Resource Types

In August of 2022, Ex Libris introduced a new feature for Primo VE - secondary resource types. This feature allows records to have at least two resource types. The main resource type will continue to appear in the record view in Primo. The secondary resource type allows records to be found using filters and search pre-filters.

WRLC configured secondary resource types for records of government documents in the WRLC Network Zone. The secondary resource type of *Government Document* is applied to the following main resource types:

- Audios
- Books
- Computer Files
- Images
- Journals
- Maps
- Video/Film

The mapping for government document uses the 008 code for government documents (position 28) with the following regular expression string:

```
^.{28}[acfilmos].*
```

Because this is configured in the Network Zone, it is only applicable to Network Zone records. If your institution would like to recreate these configurations for Institution Zone records, the settings would need to be configured in your Institution Zone.

Once saved, the secondary resource type is automatically added to new records. In order to apply the label to pre-existing records in the catalog, a Recalculate Local Resource Type job must be run on the pertinent records; this job re-indexes the records for Primo VE, thereby updating their labels.

Institution Zone Instructions :

Use the following instructions below if you wish to recreate the NZ settings in your own IZ

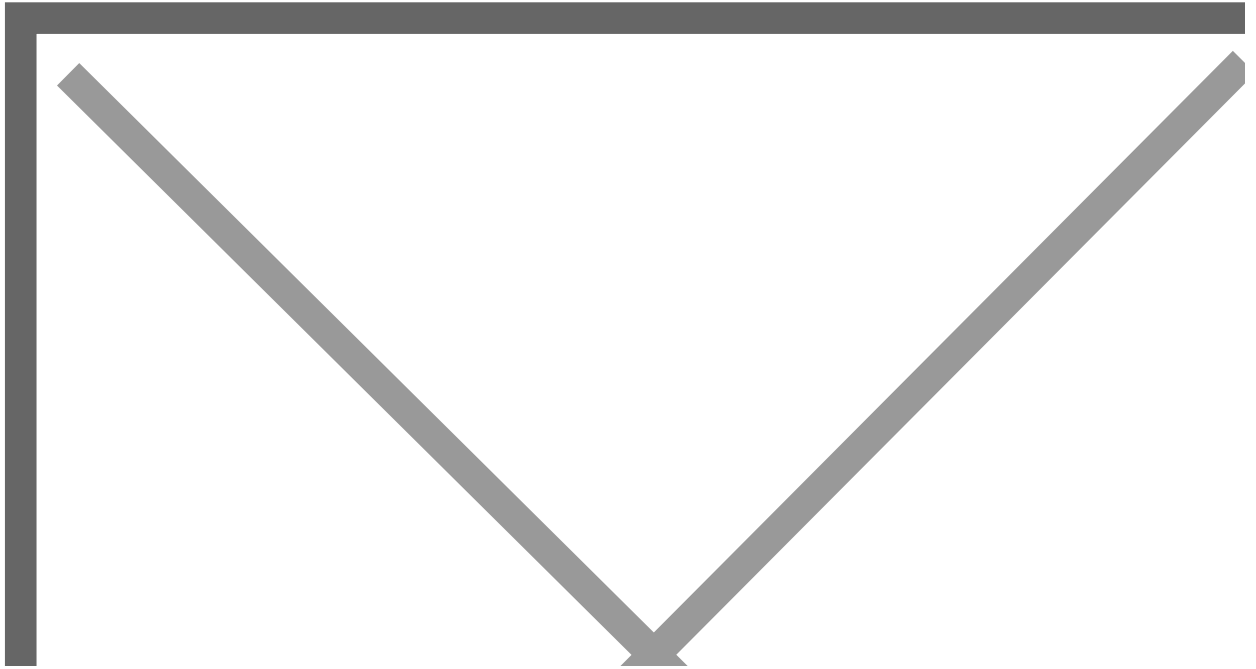
User Roles Needed :

- Discovery - Administrator
- Catalog Administrator OR Catalog Manager

Instructions :

1. Configure secondary resource types

1. Go to *Configuration > Discovery > Search Configuration > Secondary Resource Type*
2. Follow the steps below for each of the Main Resource Types listed in the summary section above:
 1. Select *Add Secondary Resource Type*
 2. Choose the *Main Resource Types* from the list in the summary above
 3. Choose the *Secondary Resource Type* of *Government Documents*

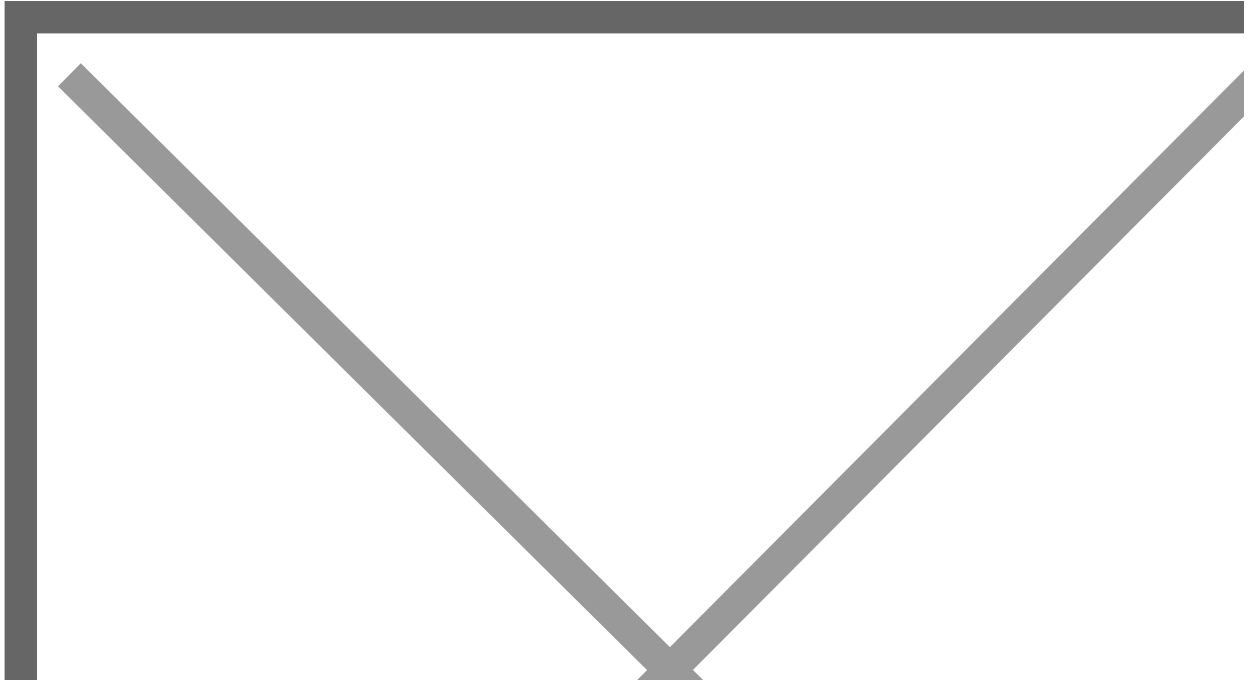


4. Under *Mapping from MARC Records*, select *Add Condition*
5. For the *MARC Field and Subfield*, type 008
6. For the *Value in MARC Field*, copy and paste the regular expression :

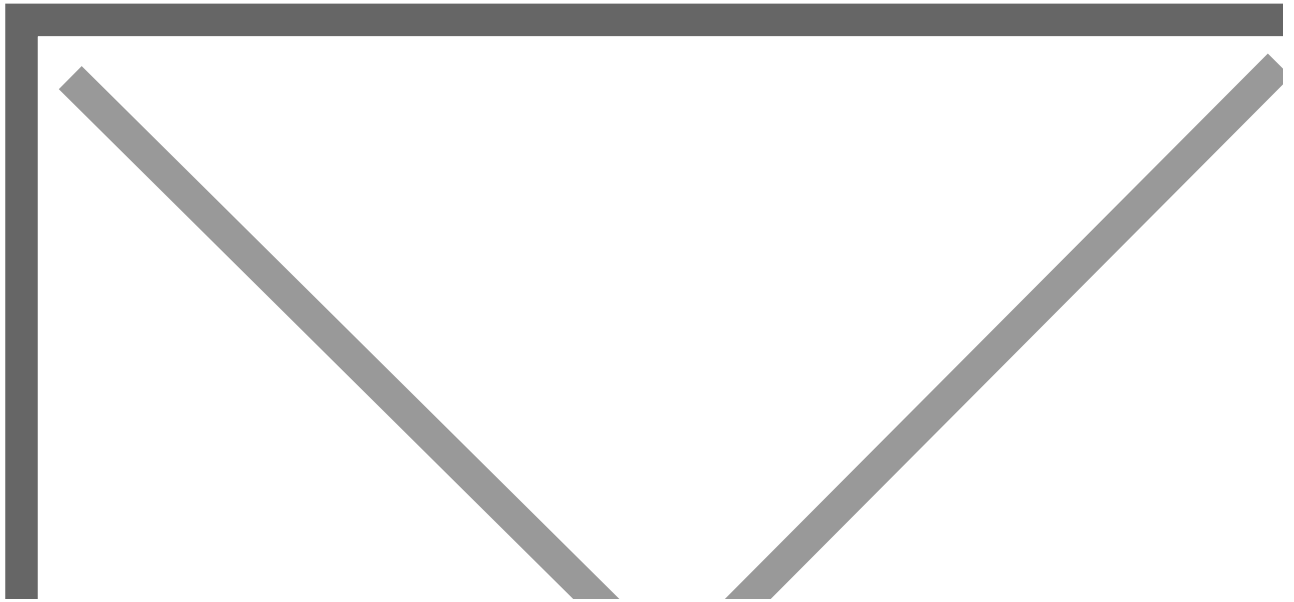
```
^.{28}[acfilmos].*
```

7. For *Use Regular Expression*, click the checkmark

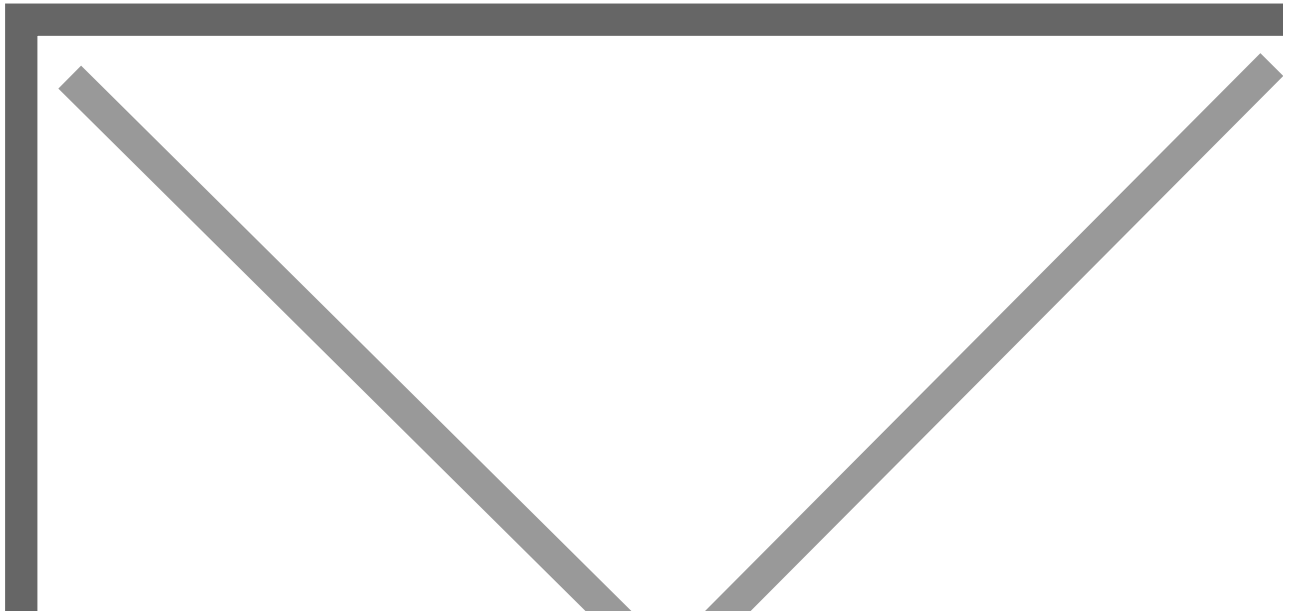
8. Select *Add Condition*



9. Select *Save* at the top right-hand side of the screen to save the Secondary Resource Type rule
 10. Repeat these steps for each of the Main Resource Types listed in the [Summary](#) portion of this document.
2. Create an indication rule to find Institution Zone records cataloged as government documents
1. Go to the *Metadata Editor*
 2. In the upper left-hand corner, select *Rules* and then select *Indication* to view all Indication Rules
 3. Search for the Indication Rule titled *Government Documents*. Right-click on the name of the rule, then choose *Duplicate*



4. A *Duplicate Rule* save page will appear. Click *Save*.
5. The new indication rule is saved to the Institution Zone, and can be used on Institution Zone records.



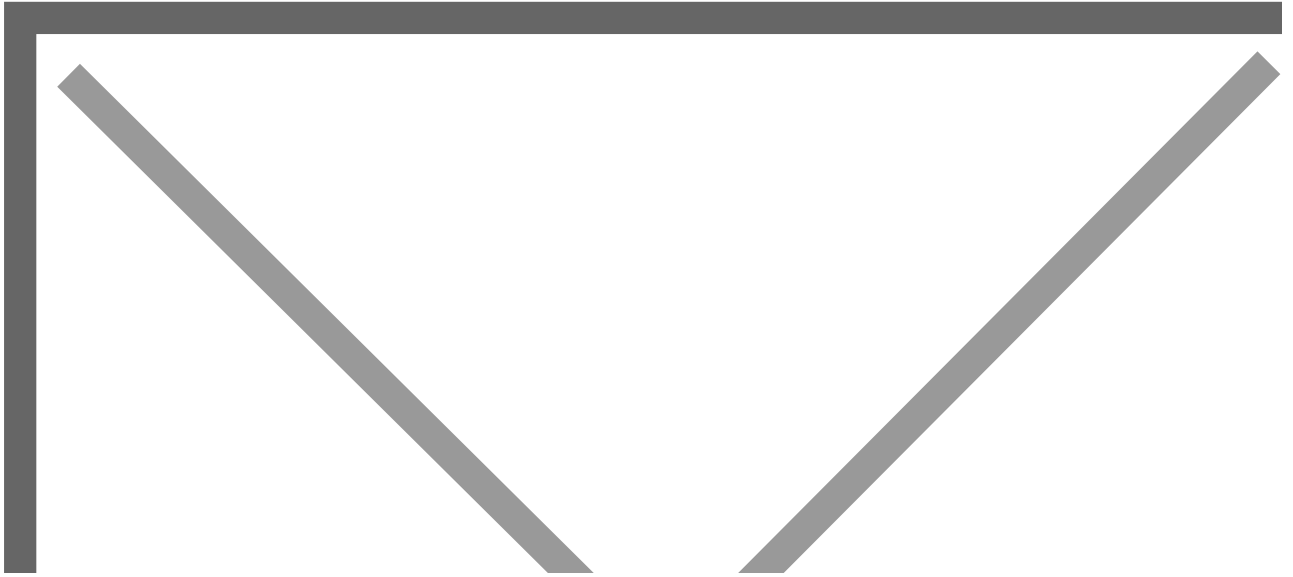
3. Filter all Institution Zone records by the *Government Documents* indication rule

1. Perform an Advanced Search in Alma by clicking the magnifying glass icon in the top left-hand corner of the Alma homepage
2. Select an *All Titles* search

3. Choose the parameters *Is Linked Equals No*, then click *Search*

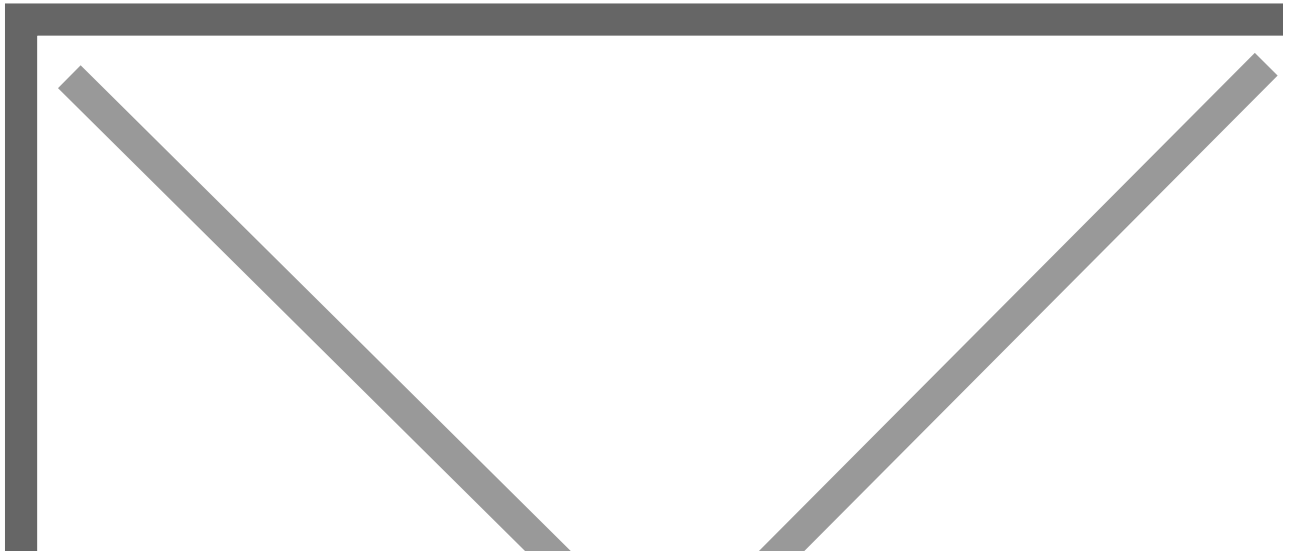


4. Once the results are listed, select *Save and Filter Query*

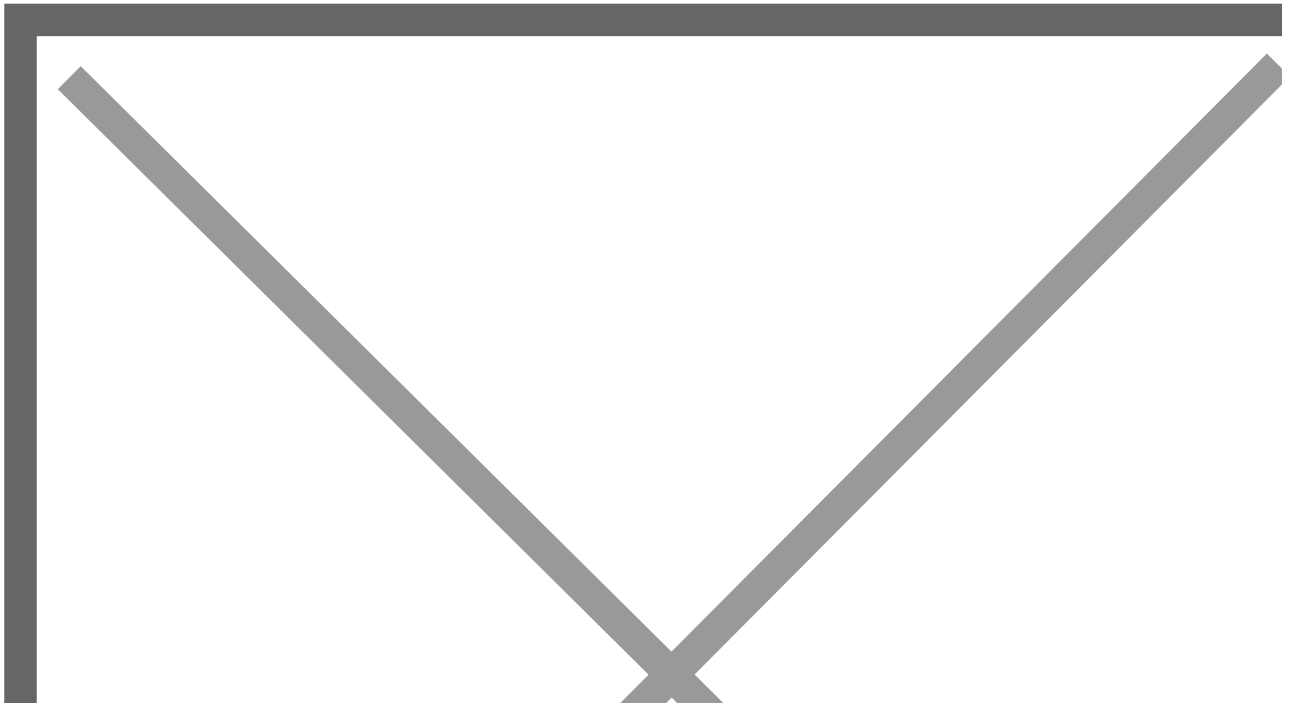


5. Type in a *Set Name*

6. Select *Save and Filter*



7. Choose the Indication Rule created earlier, then select *Filter Set*



8. Select *Confirm* to filter the set

4. Run the *Recalculate local resource types* job on the above filtered set

1. Once the filtered set has been created, go to *Admin > Run a Job*
2. Select the *Recalculate Local Resource Types* job from the Job List, then select *Next*
3. Select the filtered set created earlier, then select *Next*
4. Select *Submit*

Alma Resources :

- [Primo VE 2022 Release Notes](#)
- [Configuring Secondary Resource Types for Primo VE](#)
- [MARC21 008 field](#)
- [Working with Indication Rules](#)
- [Managing Search Queries and Sets](#)
- [Manual Jobs](#)

Posted 09/19/2022 by Jackie Saavedra (WRLC Network Zone Manager)

Resource Types Configuration

Below is a list of all custom resource types currently configured in the WRLC NZ.

Please note that the rules below only affect records linked to the Network Zone. In order to apply new resource types to IZ-only records and to IZ-linked CZ records, you will need to create and save Resource Type rules in your own Institution Zone.

1. Audio LP's

- Code : AUDIOLP
- Display Singular Label : Audio LP
- Display Plural Label : Audio LPs
- RIS Type : Sound recording
- Genre : Unknown
- Metadata format : Book
- Logic
 - MARC field and subfield : 007
 - Value in MARC subfield (regular expression):

```
^s.{2}b.*
```

2. Journals (the rules below **are added to** the [out-of-the-box configuration for Journals](#))

- Replace existing rules : No
- Logic
 - MARC field and subfield : LDR
 - Value in MARC subfield (regular expression):

```
^{6}a[bis].*
```

AND

- MARC field and subfield : 008
- Value in MARC subfield (regular expression):

```
^{21}m.*
```

3. Book Chapters (the rules below **replace** the [out-of-the-box configuration for Book Chapters](#))

- Replace existing rules : Yes

- Logic
 1. MARC field and subfield : LDR
 2. Value in MARC subfield (regular expression):

```
^. {6}aa.*
```

4. Books (the rules below **replace** the [out-of-the-box configuration for Books](#))

- Replace existing rules : Yes
- Logic
 - MARC field and subfield : LDR
 - Value in MARC subfield (regular expression):

```
^. {6}a[cdm].*
```

Resources

- [Configuring Resource Types for Primo VE](#)
- [Out-of-the-box MARC Mapping of Resource Types for Primo VE](#)

How to hide / change / add MARC fields for display in Primo (Primo VE Display Rules, and DEI - List of terms to exclude)

Editing Primo VE Display Fields

This workflow is for editing the display of specific MARC fields that are already configured in Primo to be displayed to patrons. For a full list of the MARC fields associated with each pre-configured display field, please see this [Primo Knowledge Center page](#).

1. Go to **Configuration > Discovery > Display Configuration > Manage display and local fields**
2. Choose **+ Add Field > Add Display Field**
3. Under **Field to edit**, choose the field you wish to edit from the dropdown menu.
 - To see which MARC fields are associated with which display field, please see this [Primo Knowledge Center page](#).
 - If you do not see the specific field you are looking for, it could be because your IZ already has a localized display rule for this field. If that's the case, go back to the previous screen and **Edit** the correct display field.
4. Under **MARC21 Normalization Rules**, click on the ellipsis button, then choose **Edit**.
5. From here, make the necessary changes to the display normalization rules, then click **Save**.
 - Suggested display rules for WRLC Subject Headings can be found on the following page: <https://alma.wrlc.org/books/discovery-primo-ve/page/recommended-wrlc-primo-display-norm-rules#bkmrk-subjects>
6. To configure this local field to appear in Primo to patrons, see the section below, [Adding a display of local field to a Primo VE View](#)

Suggested MARC21 Primo norm rules for WRLC Institutions can be found on the following page:

<https://alma.wrlc.org/books/discovery-primo-ve/page/recommended-wrlc-primo-display-norm-rules#bkmrk-subjects-display-rul>

For more information on Normalization Rule Syntax, see the following Primo Knowledge Center page:

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/050Display_Configuration/Configuring_Normalization_Rules_for_Display_and_Local_Fields#Normalization_Rule_Syntax](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/Configuring_Normalization_Rules_for_Display_and_Local_Fields#Normalization_Rule_Syntax)

Configuring a Primo VE Local Field

This workflow is for adding MARC fields for display that are NOT already part of one of the pre-configured Primo display fields. If the field you wish to add is not in the list found on this [Primo Knowledge Center page](#), then you need to follow the steps below to configure the MARC field for Primo as a local field. Only 009, 09X, 490, 5XX, 69X, and 9XX fields are allowed to be added as local fields

1. Go to **Configuration > Discovery > Display Configuration > Manage display and local fields**
2. Choose **+ Add Field > Add Local Field**
3. Under **Field to edit**, select the local field you wish to use (Alma allows an institution to configure up to 100 local fields)
 - To see which MARC fields are associated with which display field, please see this [Primo Knowledge Center page](#).
 - If you do not see the specific field you are looking for, it could be because your IZ already has a localized display rule for this field. If that's the case, go back to the previous screen and **Edit** the correct display field.
4. Choose a **Display label**
5. Add one or more MARC fields under **MARC21 Fields**
 - *Only 009, 09X, 490, 5XX, 69X, and 9XX fields are allowed to be added as local fields*
6. Under **MARC21 Normalization Rules**, click on the ellipsis button, then choose **Edit**.
7. From here, make the necessary changes to the display normalization rules, then click **Save**.
 - Suggested display rules for WRLC local NZ fields can be found on the following page: <https://alma.wrlc.org/books/discovery-primo-ve/page/recommended-wrlc-primo-display-norm-rules#bkmrk-local-field-rules>
8. To configure this local field to appear in Primo to patrons, see the section below, [Adding a display of local field to a Primo VE View](#)

Suggested MARC21 Primo norm rules for WRLC local NZ fields can be found on the following page:

<https://alma.wrlc.org/books/discovery-primo-ve/page/recommended-wrlc-primo-display-normalization-rules#bkmrk-local-field-rules>

For more information on Normalization Rule Syntax, see the following Primo Knowledge Center page:

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/050Display_Configuration/Configuring_Normalization_Rules_for_Display_and_Local_Fields#Normalization_Rule_Syntax](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/Configuring_Normalization_Rules_for_Display_and_Local_Fields#Normalization_Rule_Syntax)

Adding a display or local field to a Primo VE View

Once you have configured a display or local field, you can follow this workflow to add the field to a Primo VE View, specifically under the Full Display details of a resource.

1. Go to **Configuration > Discovery > Display Configuration > Configure Views**
2. Find the view you would like to edit from the list. Click on the ellipsis button for that view, then choose **Edit**.
3. Choose the **Full Record Services** tab
4. Click on the ellipsis button for **Record Details**, then choose **Configure**.
5. Here you will see a list of all display and local fields that are displayed to a patron in this Primo view; to add a new field, click **+ Add Field** and choose the correct one from the drop down menu.
 - You can change the order of the fields by using the up and down arrow buttons
6. Once you've added the field(s), the view will automatically be saved. Now the field(s) should appear to the patron in Primo VE under the Details section of the record view.

DEI - List of Terms to exclude from heading

1. Go to **Configuration > Discovery > Other > DEI - List of terms to exclude**
2. Enter list of terms you wish to exclude in the **Content** box, then press **Save**.

Filename : dei list of terms to exclude from subject heading. Content - nutrition.

Although much easier than editing display rules, it is not as precise simply because subjects containing only the word listed will not display, but subjects that contain the word as part of a phrase WILL continue to display. If you want to be thorough, you will have to list the problematic terms AND all possible variations and subfields.

Recommended WRLC Primo Display Norm Rules

The following are various Primo VE display normalization rules that can be used by WRLC institutions to display local WRLC Network Zone fields (for a full list, see the [Local Network Zone MARC Fields wiki page](#)). It is not a requirement to have these configured in a WRLC Institution Zone, but they can be helpful, depending on your institution's policies.

For instructions on how to configure new display and local fields for Primo VE, see the following Wiki page:

<https://alma.wrlc.org/books/discovery-primo-ve/page/how-to-hide-change-add-marc-fields-for-display-in-primo-primo-ve-display-rules-and-dei-list-of-terms-to-exclude>

Display Field MARC21 Norm Rules

See this page on the workflow for editing Primo VE display fields : <https://alma.wrlc.org/books/discovery-primo-ve/page/how-to-hide-change-add-marc-fields-for-display-in-primo-primo-ve-display-rules-and-dei-list-of-terms-to-exclude#bkmrk-editing-primo-ve-dis>

Subjects

For all of the Subjects display norm rules below, first delete the pre-existing code for the specific field (in this case, either 650 or 651) **before the "then" portion of the code** in the out-of-the-box Primo norm rules, then replace it with the appropriate block of code below.

Normalization rule for Subject

```
rule "Primo VE Display- Subject 650"
  when
    MARC:"650" has any "a-z" AND NOT
    MARC:"650".ind"2" equals "2"
  then
    set TEMP"1" to MARC:"650" subfields "a-u,w" delimited by " " remove substring using regex "\.+$"
    set TEMP"2" to MARC:"650" sub without sorting "v,x-z" delimited by "--"
    remove substring using regex (TEMP"2";"\.+$")
    concatenate with delimiter (TEMP"1",TEMP"2";"--")
    create pnx"display":"subject" with TEMP"1"
  end

rule "Prima_Display - Subject 651"
  when
    MARC:"651" has any "a-u,w-z" AND NOT
    MARC:"651".ind"2" equals "2"
  then
    set TEMP"1" to MARC:"651" subfields "a-u,w" delimited by " " remove substring using regex "\.+$"
    set TEMP"2" to MARC:"651" sub without sorting "x-z" delimited by "--"
    remove substring using regex (TEMP"2";"\.+$")
    concatenate with delimiter (TEMP"1",TEMP"2";"--")
    create operational:"prima_display":"subject" with TEMP"1"
  end

rule "Primo VE Display- Subject 653"
  when
    MARC:"653" has any "a-u,w"
```

***This is the portion
of the code that
should be replaced.***

Restore Default

Close

Save

Hide "America, Gulf of" in a 650 subfield \$\$z

```
rule "Primo VE Display - Subject 650 (hide 650 $$z Gulf of America LCSH heading)"
  when
    MARC:"650" has any "a-u,w-z" AND NOT
    MARC:"650"."z" match "America, Gulf of*" AND NOT
    MARC:"650".ind"2" equals "2"
```

Hide "Illegal aliens" and other related LCSH in a 650 subfield \$\$a

```
rule "Primo VE Display - Subject 650 (hide 650 $$a Illegal aliens and related LCSH headings)"
  when
    MARC:"650" has any "a-u,w-z" AND NOT
    MARC:"650"."a" match "Illegal alien.*" AND NOT
    MARC:"650"."a" match "Alien criminals" AND NOT
    MARC:"650"."a" match "Alien detention centers" AND NOT
    MARC:"650"."a" match "Alien property" AND NOT
```

```
□□MARC."650"."a" match "Church work with aliens" AND NOT
□□MARC."650".ind"2" equals "2"
```

All 650 field rules listed above combined

```
rule "Primo VE Display - Subject 650 (display 650 local supplement WRLC headings and hide 650
$$z Gulf of America, $$a Illegal aliens, and related LCSH headings)"
□when
□□MARC."650" has any "a-u,w-z" AND NOT
□□MARC."650"."z" match "America, Gulf of*" AND NOT
□□MARC."650"."a" match "Illegal alien.*" AND NOT
□□MARC."650"."a" match "Alien criminals" AND NOT
□□MARC."650"."a" match "Alien detention centers" AND NOT
□□MARC."650"."a" match "Alien property" AND NOT
□□MARC."650"."a" match "Church work with aliens" AND NOT
□□MARC."650".ind"2" equals "2"
```

Hide "Gulf of America", "America, Gulf of", and "McKinley, Mount (Alaska)" in a 651 subfield \$\$a

```
rule "Prima_Display - Subject 651 (hide 651 $$a Gulf of America and Mount McKinley LCSH
headings)"
□when
□□MARC."651" has any "a-z" AND NOT
    MARC."651"."a" match "America, Gulf of*" AND NOT
    MARC."651"."a" match "Gulf of America*" AND NOT
    MARC."651"."a" match "McKinley, Mount (Alaska)*" AND NOT
□□MARC."651".ind"2" equals "2"
```

Local Field MARC21 Norm Rules

See this page on the workflow to configuring a Primo VE local fields :

<https://alma.wrlc.org/books/discovery-primo-ve/page/how-to-hide-change-add-marc-fields-for-display-in-primo-primo-ve-display-rules-and-dei-list-of-terms-to-exclude#bkmrk-configuring-a-primo->

Display local WRLC subject headings in a 690 field (these are added to CZ records)

First delete the **entire** pre-existing code for the local field in the out-of-the-box Primo norm rules, then replace it with the block of code below.

```
rule "Primo VE - display local WRLC subject headings in CZ records, 690 field"
[]when
  []MARC "XXX" has any "a-z"
[]then
  []set TEMP"1" to MARC."XXX" subfields "a-w" delimited by " " remove substring using regex
  "\\.+ $"
  []set TEMP"2" to MARC."XXX" subfields "x-z" delimited by " -- " remove substring using regex
  "\\.+ $"
  []concatenate with delimiter (TEMP"1",TEMP"2"," -- ")
    create pnx."display"."subject" with TEMP"1"
end
```

Resources

For more information on Normalization Rule Syntax, see the following Primo Knowledge Center page:

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/050Display_Configuration/Configuring_Normalization_Rules_for_Display_and_Local_Fields#Normalization_Rule_Syntax](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/Configuring_Normalization_Rules_for_Display_and_Local_Fields#Normalization_Rule_Syntax)

For instructions on how to configure new display and local fields for Primo VE, see the following Wiki page:

<https://alma.wrlc.org/books/discovery-primo-ve/page/how-to-hide-change-add-marc-fields-for-display-in-primo-primo-ve-display-rules-and-dei-list-of-terms-to-exclude>

Deduplication / FRBR

Primo uses Deduplication and FRBR (Functional Requirements for Bibliographic Records) processes to combine or group redundant records in the brief search results.

Dedup and FRBR settings are configured **per view** under **Alma Configuration > Discovery > Display Configuration > Configure Views > Edit the View > Brief Results tab**

More information can be found in the following Primo Knowledgebase pages :

- [Understanding the Dedup and FRBR Processes \(Primo VE\)](#)
- [Configuring FRBR/Dedup Display Options](#)
- [Configuring the Dedup and FRBR Complete Keys in Primo VE](#)
- [Dedup and FRBR Analysis Tool for Primo VE](#)

Prevent FRBR and/or **Dedup** in Discovery

Alma gives you the ability to prevent dedup/FRBR on specific records. This can be done in one of two ways : create a rule, or run a job on a set of records (the *Prevent FRBR and/or Dedup in Discovery* job). More information can be found in the following Primo Knowledgebase pages :

- [Suppressing Groups of Records from Dedup/FRBR for Primo VE](#)
- [Manual Jobs and Their Relevant Parameters](#) (look for *Prevent FRBR and/or Dedup in Discovery* under the list of jobs)

For both workflows, dedup/ FRBR suppression completed in the IZ are applied to local records only. If local records are linked in the NZ, they cannot be suppressed in the NZ unless you also create the same suppression rules in the NZ.

If there are specific NZ records for which you need Dedup or FRBR suppressed, please send an email to servicedesk@wrlc.org

In the WRLC NZ, we have two Suppress Dedup/FRBR Rules configured for the NZ-linked records in our shared catalog:

- Uniform title Bible

- IF Uniform Title (field 130 in the MARC record) contains "Bible", then suppress Dedup and FRBR
- Journal of applied behavior analysis
 - IF Title contains "Journal of applied behavior analysis", then suppress Dedup
 - This was configured for Salesforce case #00833444 with George Mason University

Resource Sharing Form (Delivery Fields)

The Delivery Fields section of the Resource Sharing Form configuration determines which (if any) pickup locations are displayed to patrons when they request items in Primo VE.

The following are the recommended configurations for WRLC institutions participating in our AFN network.

Keep in mind that our [NZ Terms of Use for requesting](#) are configured to be Pick up Anywhere. This allows staff members to choose any pickup location for patrons when they request items **in Alma**. Our consortia uses the Discovery configuration below to only show IZ-only locations for patrons when they request items in **Primo**.

1. Go to **Configuration > Discovery > GetIt Configuration > Resource Sharing Request**. Scroll down to the **Delivery Fields** section

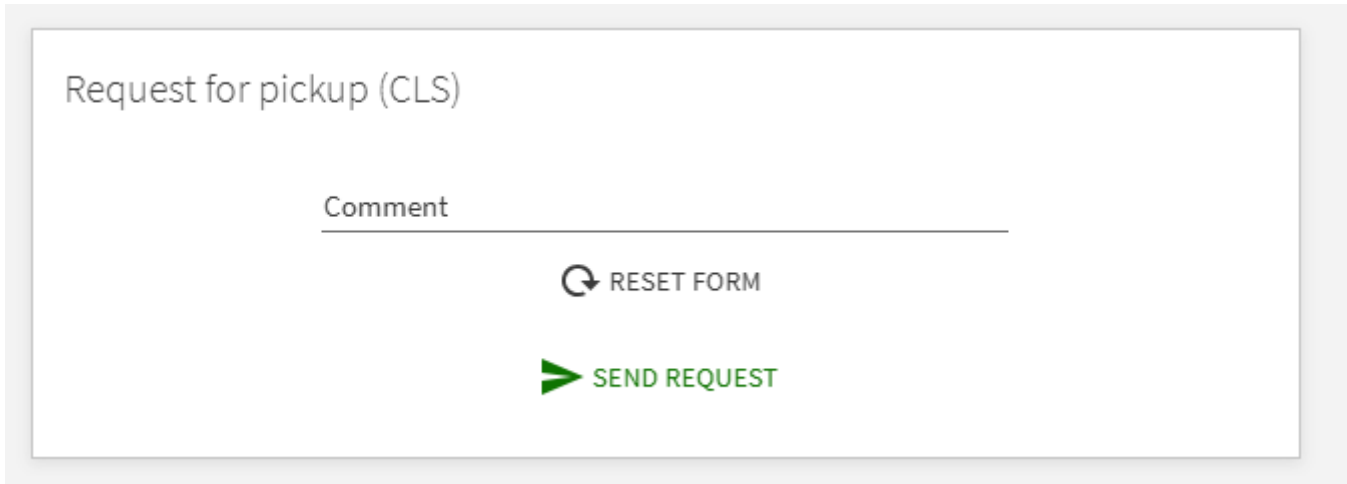
IF your institution only has only **one pickup location**, then you can configure the following:

| Delivery fields | | | | |
|-----------------|---------------------------------|-------------------------------------|-------------------------------------|----------|
| | Field Name | Mandatory | Visible | Default |
| 1 | Format | <input type="checkbox"/> | <input type="checkbox"/> | Physical |
| 2 | Requested Media | <input type="checkbox"/> | <input type="checkbox"/> | Any |
| 3 | Alternative Location Address | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4 | Alternative Location E-mail | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5 | Preferred Pickup Institution | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| 6 | Preferred Pickup Location | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| 7 | Not Need After | <input type="checkbox"/> | <input type="checkbox"/> | |
| 8 | Comment | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| 9 | Allow Other Library | <input type="checkbox"/> | <input type="checkbox"/> | |
| 10 | Preferred Local Pickup Location | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| 11 | Maximum Fee | <input type="checkbox"/> | <input type="checkbox"/> | |
| 12 | Level Of Service | <input type="checkbox"/> | <input type="checkbox"/> | |
| 13 | Copyrights | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| 14 | Language | <input type="checkbox"/> | <input type="checkbox"/> | |
| 15 | Willing To Pay | <input type="checkbox"/> | <input type="checkbox"/> | |
| 16 | Generic Field | <input type="checkbox"/> | <input type="checkbox"/> | |

Leave the following options **blank** (no checkmarks):

- Preferred Pickup Institution (if checked, this will list all institutions in our NZ)
- Preferred Pickup Location (if checked this will list all libraries in our NZ)
- Preferred Local Pickup Location

The Primo request form will then not display a pickup location option for patrons.



IF your institution has **multiple pickup locations** for patrons, you can configure the following:

| Delivery fields | | Field Name | Mandatory | Visible | Default |
|-----------------|--|---------------------------------|-------------------------------------|-------------------------------------|----------|
| 1 | | Format | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Physical |
| 2 | | Requested Media | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3 | | Alternative Location Address | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4 | | Alternative Location E-mail | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5 | | Preferred Pickup Institution | <input type="checkbox"/> | <input type="checkbox"/> | |
| 6 | | Preferred Pickup Location | <input type="checkbox"/> | <input type="checkbox"/> | |
| 7 | | Allow Other Library | <input type="checkbox"/> | <input type="checkbox"/> | |
| 8 | | Preferred Local Pickup Location | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| 9 | | Not Need After | <input type="checkbox"/> | <input type="checkbox"/> | |
| 10 | | Generic Field | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| 11 | | Comment | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| 12 | | Maximum Fee | <input type="checkbox"/> | <input type="checkbox"/> | |
| 13 | | Level Of Service | <input type="checkbox"/> | <input type="checkbox"/> | |
| 14 | | Copyrights | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| 15 | | Language | <input type="checkbox"/> | <input type="checkbox"/> | |
| 16 | | Willing To Pay | <input type="checkbox"/> | <input type="checkbox"/> | |

Leave the following options **blank** (no checkmarks):

- Preferred Pickup Institution (if checked, this will list all institutions in our NZ)
- Preferred Pickup Location (if checked this will list all libraries in our NZ)

Check **Mandatory** and **Visible** for the following option:

- Preferred Local Pickup Location

The Primo request form will then display a drop down menu of all pickup locations in your Institution Zone

Consortium Loan Service Request

Title

★ **Crusaders : the epic history of the wars for the holy lands /**

Author

Jones, Dan,

Edition

ISBN

9780525428312

Publisher

Viking,

Publication year

[2019]

★ **Pickup/Delivery option** ▼

Please check box if we should try closest libraries only.
Leave unchecked to allow time for wider search

Comment

 RESET FORM

 SEND REQUEST

Consortium Loan Service Request

Title

★ Crusaders : the epic history of the wars for the holy lands /

Author

Jones, Dan,

Edition

ISBN

9780525428312

Publisher

Viking,

Publication year

[2019]

Temporary Pickup Location GW Law Library (Summer 2025)

GW Online-Only Community

Virginia Science & Technology Campus Library

Comment

 RESET FORM

 SEND REQUEST

A note about Rapido Institutions

For Rapido institutions, the Request TOU setting (specifically the "Pickup at Institution" value) controls the pickup options that appear in both Alma AND Primo. When you set the TOU to "Pickup at Institution" Rapido will only show the patron's own institution as a valid pickup option, and other institutions in your network won't appear on the list.

For non-Rapido institutions, however, Primo does NOT use the TOU settings when displaying pickup locations in the Primo request form; it uses the Resource Sharing Form configuration (described above) instead. Unlike Rapido institutions, TOU settings for non-Rapido institutions pertains to staff-side requests in Alma, not to patron-side requests in Primo. In this case, the list of AFN partner institutions will still appear in Primo regardless of the request TOUs unless you explicitly restrict

them using the Resource Sharing Request Form configuration.

Please see Salesforce case #08203423 for more details.

Display Logic Rules for the AFN/CLS Request Form in Primo

Information about configuring the display logic rules for the AFN/CLS Request Form displayed in Primo can be found on the [Display Logic Rules for the AFN/CLS Request Form in Primo](#) page of the WRLC Alma Wiki. These configuration settings determine when and for whom various Primo links appear for patrons, including the link to the CLS Request Form.

How To Suppress Chapter-Level Records in Primo (CDI Content)

For detailed instructions on how to suppress chapter-level records in Primo VE, please see the corresponding page in the E-Resources section of the WRLC Alma Wiki.

[How To Suppress Chapter-Level Records in Primo \(CDI Content\)](#)

Managing Custom Banner Notifications in Primo VE

To include an alert banner message in your institution's Primo VE discovery interface, simply fill out the information for your university in [this spreadsheet](#).

Below is an example of the fields you may configure.

- For "Message", type the information you wish to display in the banner message.
- For "link", include a URL if applicable. You may leave this field blank.
- For "expirationdate", set the end date for when you want the message to expire.
- You may ignore the remaining fields as they are used by the backend to determine how and when messages are displayed.

| | message | link | show | expirationdate |
|----|--|---|-------|----------------|
| au | Links to Proquest Congressional and Supreme Court Insight databases are not working correctly. Please click here to access these resrouces from the A-Z Database list. | https://subjectguides.library.american.edu/az.php | FALSE | 12/19/23 |

If you do not have access to the spreadsheet linked above, please contact Joel Shields at joel.shields@wrlc.org.

Primo Date Handling

Compiled in September 2025; examples taken from questions asked by Georgetown library staff

Summary of the current understanding of MARC date fields and their use by Primo date-related functions, based on documentation and explanations provided in Ex Libris Support case #08147923.

Advanced Search by Date

Date fields are used in this order: 008 pos. 7-10 --> 260 c --> 264 c

A 008 start date (pos 7-10) of 9999 is disregarded and a 26x date is used instead. There's an internal rule that ignores "9999" in this field since it's the maximum value and can't be treated as a start date, so the system instead uses MARC 260c or 264c for the date portion of the search.

Publication Date Facet

Date fields are used in this order: 260 c --> 264 c --> 008

The facet starts by using the 26x fields (the date field(s) that are visible to patrons), and only reverts to the 008 if those are empty or unknown.

Sort By Date

Date fields are used in this order: 008 pos. 7-10 --> 260 c --> 264 c

The rule for skipping "9999" (when applying a date range as part of an Advanced Search) does not apply to sorting, so records with 9999 will be at the top of a Date-Newest sort.

This means that when the 008 date is unsortable (i.e., completely unknown like #### or ||||), Primo will fall back to 260c or 264c for sorting. If multiple fallback fields exist, it chooses the lower field according to the sort logic.

For partial dates like 19## or 19uu, the rule replaces the unknown elements with 0, so 19uu becomes 1900 for sorting purposes. This allows partially known dates to be sorted according to the 008, whereas completely unknown dates will trigger the fallback to 260c or 264c.

Examples

Example 1: Record a publication date and copyright date

A record with an 008 Date 1 of 2021, a 264c of 2021 (publication date), and a 264c of 2020 (copyright date) will use 2021 for the Advanced Search date range and for Date sorting. The Publication Date facet checks BOTH 2020 and 2021, so a 2020-2020 Publication Date range will include this record, as will a 2021-2021 Publication Date range.

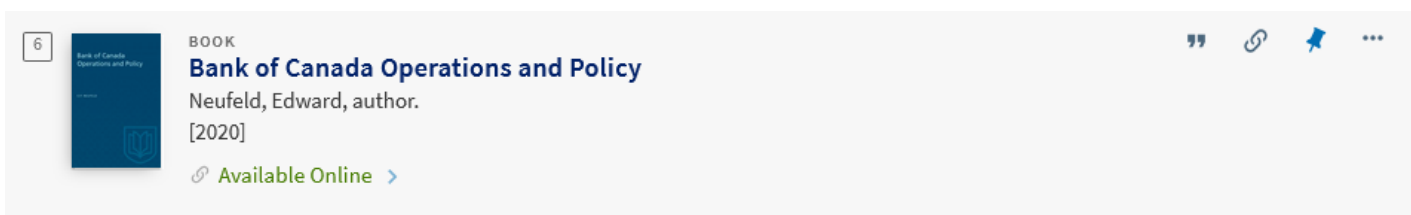


19  BOOK
This is big : how the founder of weight watchers changed the world--and me
Meltzer, Marisa, 1977- author.
2021
[Available at Lauinger Library Stacks \(RM214.6 .M45 2021\) >](#)

[Source record view](#)

Example 2: Record with a reprint date and copyright date

A record with an 008 Date 1 of 2020 (reprint/reissue date), a 264c of [2020] (approximate release date), and a 264c of 1958 (copyright date) will use 2020 for the Advanced Search date range and for Date sorting. The Publication Date facet checks BOTH 1958 and 2020, so an entered date range including one or the other date will include this record.



6  BOOK
Bank of Canada Operations and Policy
Neufeld, Edward, author.
[2020]
[Available Online >](#)

[Source record view](#)

Example 3: Largely unknown date

A record with an 008 Date 1 of 1uuu and no 264 dates will use 1000 (normalized from 1uuu) for the Advanced Search range, Date sorting, and the Publication Date facet.

1  JOURNAL
Calendars of the United States House of Representatives and history of legislation.
United States. Congress. House.; United States. Congress. House. Office of Legislative Operations.
1???


 Available at [Lauinger Library Microforms \(In Library Use Only\) \(CIS 2003 H940-7\) and other locations](#) >
 [Available Online](#) >


[Source record view](#)

Example 4: Nonspecific date (9999)

A record with an 008 Date 1 of 9999 and a 260c date of 1970 will use 1970 for the Advanced Search date range and for the Publication Date facet. It will use 9999 for Date sorting, which puts it at the top of a Date-Newest listing.

(Such records are typically from e-resource vendors and do not conform to typical cataloging practice.)

1  BOOK
In Pride and With Promise
Deakin, Phyllis A., 1899-1997; International Federation of Business and Professional Women, 1930-1970

 [Available Online](#) >

[Source record view](#)

Documentation

Ex Libris documentation of mappings:

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/120Other_Configurations/Mapping_to_the_Display%2C_Facets%2C_and_Search_Sections_in_the_Primo_VE_Record](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/120Other_Configurations/Mapping_to_the_Display%2C_Facets%2C_and_Search_Sections_in_the_Primo_VE_Record)

Library of Congress documentation about the MARC date fields:

- [008](#)
- [260](#)
- [264](#)