

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*

The screenshot shows the 'Edit Secondary Resource Type' interface. On the left is a blue sidebar with navigation icons for Alma, Acquisitions, Resources, Discovery, Fulfillment, User Management, General, and Analytics. The main content area has a title bar with a back arrow, 'Edit Secondary Resource Type', and a 'Cancel' button. Below the title bar is the 'General' tab. It contains two dropdown menus: 'Main Resource Type' (set to 'Books') and 'Secondary Resource Type' (set to 'Government documents'). Below these are two sections: 'Mapping from MARC records' and 'Mapping from Dublin Core'. Each section has a table icon, the text 'No records were found.', and an 'Add Condition' button.

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*

Alma

Acquisitions

Resources

Discovery

Fulfillment

User Management

General

Analytics

← Edit Secondary Resource Type

General

Main Resource Type * Books

Secondary Resource Type * Government documents

Mapping from MARC records

No records were found.

Mapping from Dublin Core

No records were found.

MARC field and subfield *

008

Value in MARC field *

^(28)[acfilmos].

Use Regular Expression

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.

Alma

Acquisitions

Resources

Discovery

Fulfillment

User Management

General

Analytics

← Secondary Resource Type

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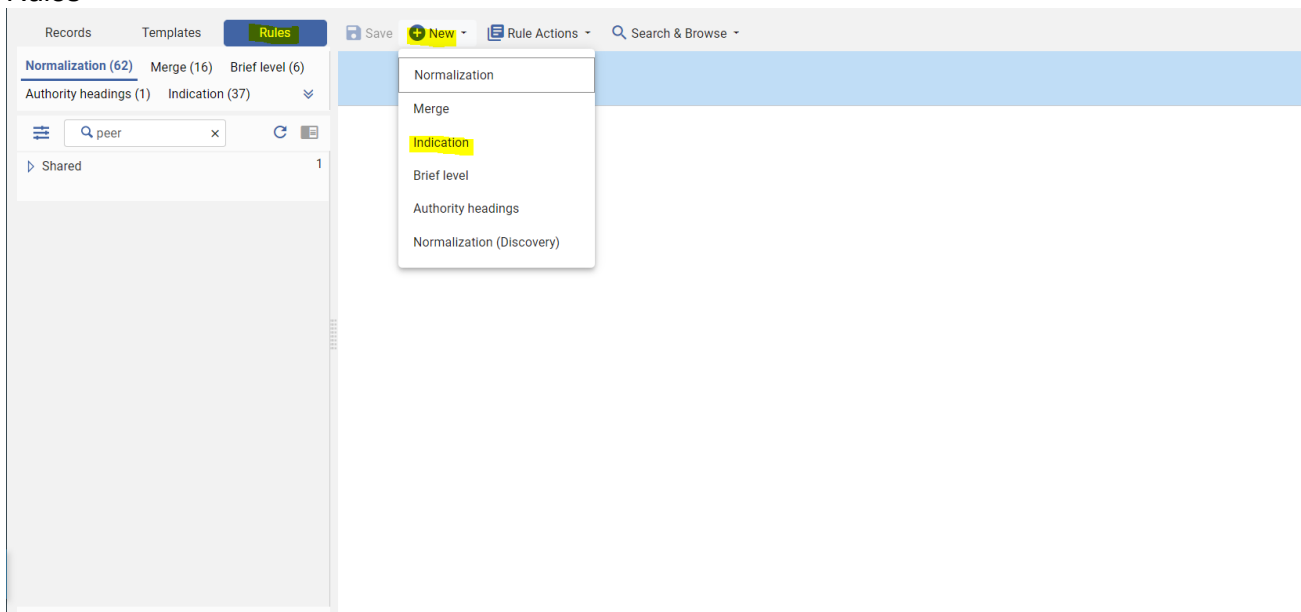
+ Add Secondary Resource Type

	Enabled	Main resource type	Secondary resource type	Updated by
1	☒	Audios	Government documents	Saavedra
2	☒	Books	Government documents	Saavedra
3	☒	Computer files	Government documents	Saavedra
4	☒	Images	Government documents	Saavedra
5	☒	Journals	Government documents	Saavedra
6	☒	Maps	Government documents	Saavedra
7	☒	Video/Film	Government documents	Saavedra

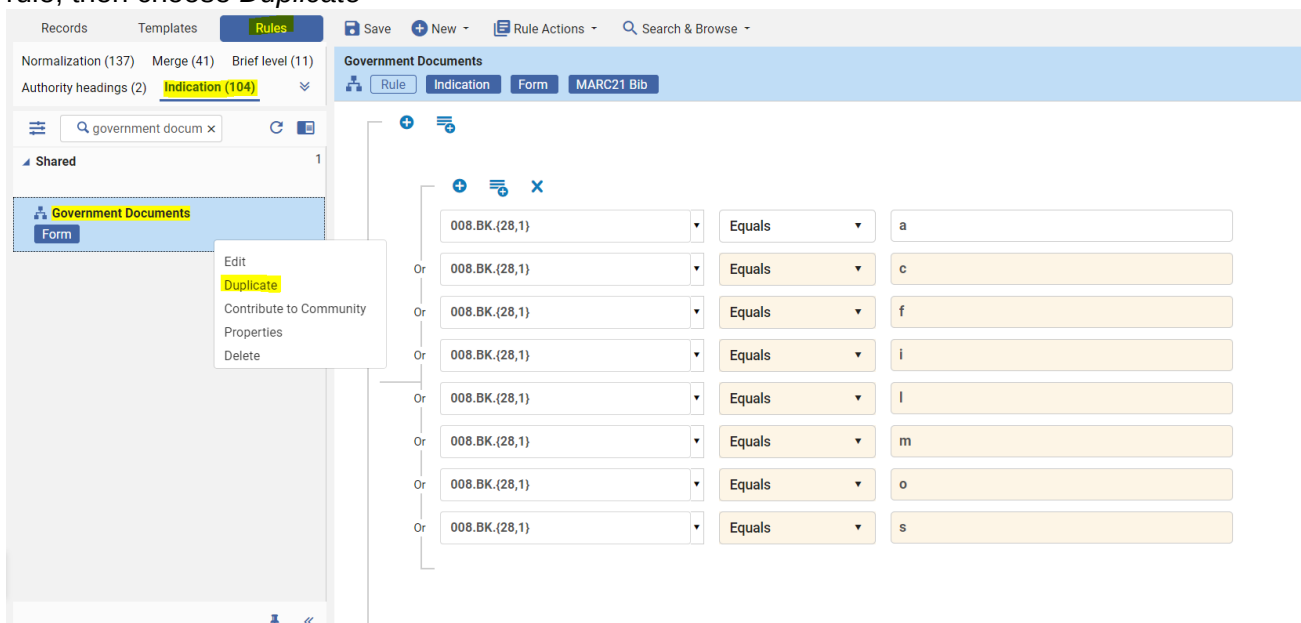
2. Create an indication rule to find Institution Zone records cataloged as government documents

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*

The screenshot shows a search bar with the following configuration: Search in: All titles, Zone: Institution (selected), Network, Community. The query is set to 'Is linked' (selected), 'Equals' (selected), and 'No' (selected). There are buttons for 'Clear form' and 'Search'.

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

The screenshot shows the search results for the query 'where (Is linked equals "No")'. The results are sorted by Rank. The first result is 'Thin air : a Spenser novel / Robert B. Parker.' with details including ISBN, Language, and MMS ID. There is a button 'Save and Filter Query' in the top right corner.

5. Type in a *Set Name*

6. Select *Save and Filter*

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

The screenshot shows the 'Set Details' form for 'Institution Zone Records'. The form includes fields for Set name, Description, Note, Set content type, Private status, Creation date, Updated by, Set ID, Set type, Logical status, Status, Created by, Content Origin, and Indication Rule. The 'Save and Filter' button is highlighted in yellow.

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)

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