



Go VE - Become an Expert

Go VE for NZ consortia

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By the end of this session, you will be able to:

- Meet the Differences between Primo and Primo VE Network Zone
- Transfer network functionality from Primo to Primo VE



Main Principles and Differences between Primo and Primo VE

- Central index
- Normalization
 - Display fields
 - Local search and facet fields
- View it from other institutions/campuses service
- Dedicated consortium facets
- Central management and configuration
- Union view



Main Principles and Differences between Primo and Primo VE

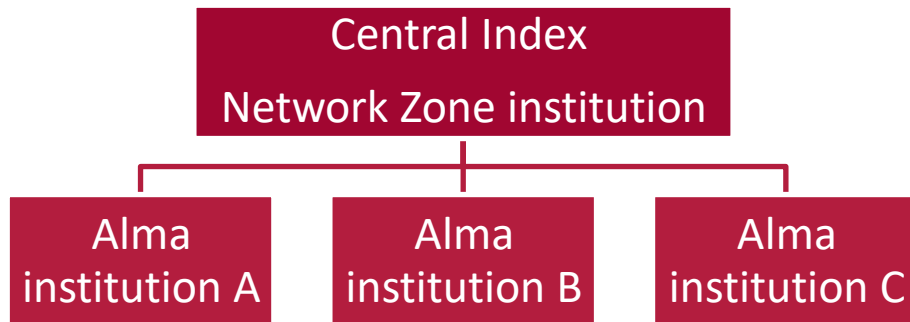
- **Central index**
- Normalization
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Main Principles and Differences between Primo and Primo VE

- **Central index**

Primo VE builds a central index with the entire consortium's data



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Main Principles and Differences between Primo and Primo VE

- **Normalization**

Primo –

- Consortium publishes full network data in one pipe
- Using a unified normalization rule file

Primo VE –

- Re-normalization and re-indexing is not required
- Changes are applied immediately in most cases



Main Principles and Differences between Primo and Primo VE

- **Normalization**

- **Display fields**

- ✓ Every institution can define its own display field normalization
 - ✓ The changes at institution level affect only that institution

- **Local search and facet fields**

- ✓ Using bibliographic field mapping method - every institution can create these fields independently
 - ✓ Using the normalization rules mapping method - coordination with other institutions is necessary

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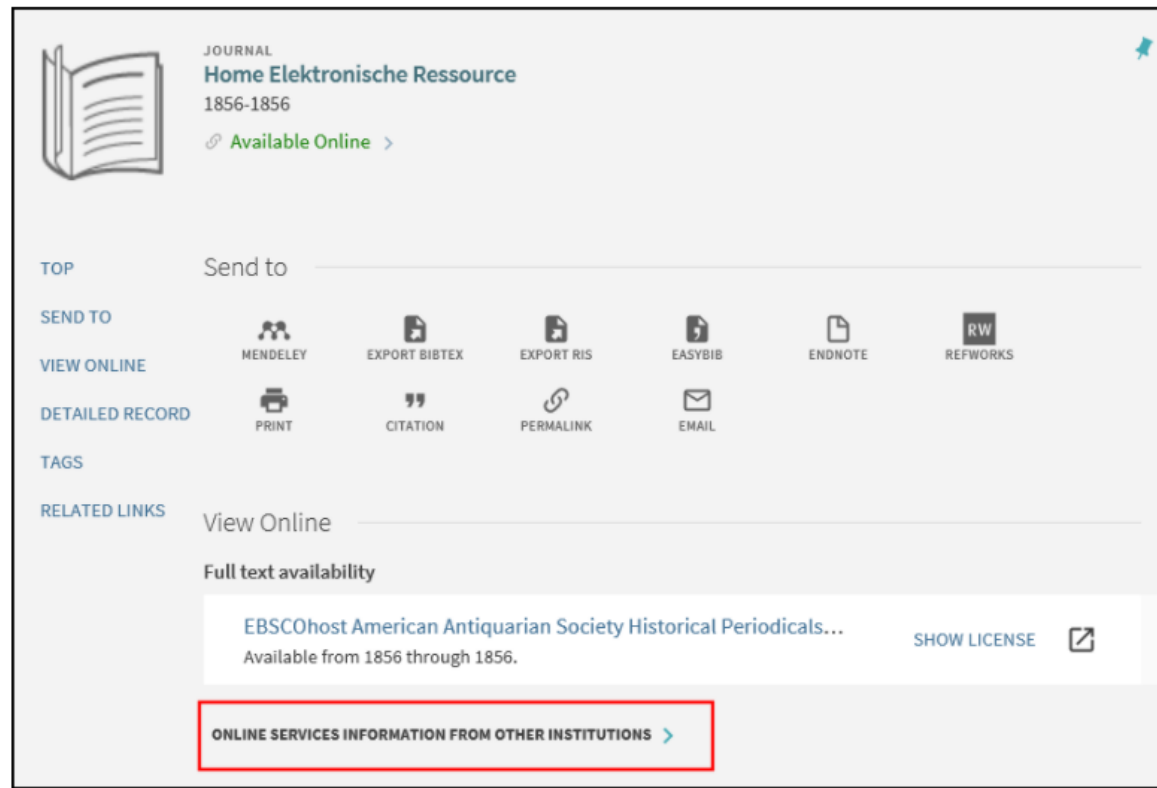


View it from other institutions/campuses service

- Primo VE allows members of a consortium to display View It services for Alma electronic and digital records from other member institutions on the Full Display page



View it from other institutions/campuses service



The screenshot displays a digital library interface for a journal. At the top left is an icon of an open book. To its right, the text reads "JOURNAL Home Elektronische Ressource 1856-1856". Below this, a green link "Available Online >" is shown. A vertical menu on the left includes "TOP", "SEND TO", "VIEW ONLINE", "DETAILED RECORD", "TAGS", and "RELATED LINKS". The "SEND TO" section contains icons and labels for Mendeley, Export BibTeX, Export RIS, EasyBib, Endnote, and Refworks. The "DETAILED RECORD" section has icons for Print, Citation, Permalink, and Email. The "RELATED LINKS" section features a "View Online" link and a "Full text availability" section. This section contains a link to "EBSCOhost American Antiquarian Society Historical Periodicals..." with the text "Available from 1856 through 1856." and a "SHOW LICENSE" button. At the bottom, a red-bordered box highlights the link "ONLINE SERVICES INFORMATION FROM OTHER INSTITUTIONS >".

JOURNAL
Home Elektronische Ressource
1856-1856
[Available Online >](#)

TOP

SEND TO

VIEW ONLINE

DETAILED RECORD

TAGS

RELATED LINKS

Send to

MEDELEY

EXPORT BIBTEX

EXPORT RIS

EASYBIB

ENDNOTE

REFWORKS

PRINT

CITATION

PERMALINK

EMAIL

View Online


Full text availability

[EBSCOhost American Antiquarian Society Historical Periodicals...](#)
Available from 1856 through 1856.

[SHOW LICENSE](#)

[ONLINE SERVICES INFORMATION FROM OTHER INSTITUTIONS >](#)

View it from other institutions/campuses service

 **JOURNAL**
Home Elektronische Ressource
1856-1856
[Available Online >](#)

TOP

SEND TO







VIEW ONLINE





DETAILED RECORD

TAGS

RELATED LINKS


Send to

 MENDELEY  EXPORT BIBTEX  EXPORT RIS  EASYBIB  ENDNOTE  REFWORKS


 PRINT  CITATION  PERMALINK  EMAIL

View Online

Full text availability

[EBSCOhost American Antiquarian Society Historical Periodicals...](#) [SHOW LICENSE](#) 

Available from 1856 through 1856.

ONLINE SERVICES INFORMATION FROM OTHER INSTITUTIONS 

Georgetown University
[Online Access](#)

Georgetown University Law Library
[Online Access](#)

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Main Principles and Differences between Primo and Primo VE

- **Dedicated consortium facets**

Primo VE automatically creates configurable facets that are related to consortia



Dedicated consortium facets

The screenshot shows the Alma search interface. At the top, there are navigation tabs: LIBRARY SEARCH, JOURNAL SEARCH, ILL REQUEST, FETCH ITEM, BROWSE, DATABASE SEARCH, and a menu icon. A search bar contains the text 'madrid' and a dropdown menu shows 'Alma Consortium'. To the right of the search bar is a magnifying glass icon and a link to 'ADVANCED SEARCH'. Below the search bar, it says 'PAGE 1 1,710 Results'. The main results area lists four books, all titled 'Madrid'. The first book is by Rice, Christopher; Rice, Melanie (2008) and is available online. The second book is by an unknown author (2013). The third book is by Leapman, Michael (2007). The fourth book is by Dorling Kindersley Publishing Staff Corporate Author; Leapman, Michael Contributor; Eyewitness Books Staff Content Provider (2009). On the right side, there is a 'Tweak your results' section with various filters: Sort by (Relevance), Availability, Resource Type, Subject, Creation Date, Author/Creator, Language, Library, and Institution. The 'Library' and 'Institution' facets are highlighted with a red box. The 'Library' facet shows 'Alma University(31)' and 'University of Knowledge(23)'.

LIBRARY SEARCH JOURNAL SEARCH ILL REQUEST FETCH ITEM BROWSE DATABASE SEARCH ...

madrid X Alma Consortium ADVANCED SEARCH

PAGE 1 1,710 Results

1. BOOK **Madrid**
Rice, Christopher; Rice, Melanie
2008
Available Online >

2. BOOK **Madrid.**
2013
Check for available services >

3. BOOK **Madrid**
Leapman, Michael Author; Dorling Kindersley Publishing Staff Content Provider
2007
Check for available services >

4. BOOK **Madrid**
Dorling Kindersley Publishing Staff Corporate Author; Leapman, Michael Contributor; Eyewitness Books Staff Content Provider
2009
Check for available services >

Tweak your results

Sort by Relevance ▾

Availability ▾

Resource Type ▾

Subject ▾

Creation Date ▾

Author/Creator ▾

Language ▾

Library ▾

Institution ▲

Alma University(31)

University of Knowledge(23)

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Main Principles and Differences between Primo and Primo VE

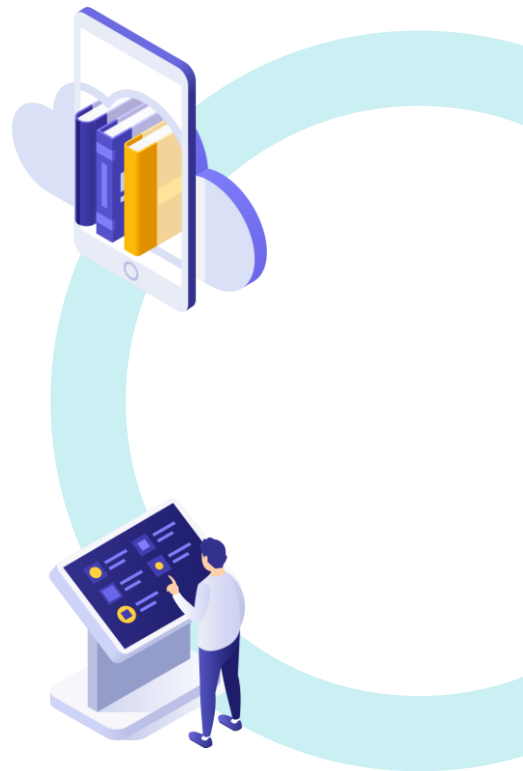
- **Central management and configuration**

Primo VE allows a consortium to manage several elements centrally using the NZ institution



Main Principles and Differences between Primo and Primo VE

- **Central management and configuration**
- The Central Package, provides standard look and feel that member can use as a template
- The NZ can configure local fields, resource types, code and mapping tables to share with member institutions



The Central Package

[<](#) View Configuration

BackSave

GeneralLinks MenuSearch Profile SlotsAdvanced Search ConfigurationBrief ResultsBrief Record DisplayFull Record ServicesManage Customization Package

Create Customization Package

[Go to Primo Studio](#)

Download Package

Template View Customization PackageDownload

Current View Customization PackageDownload

Download Central Customization PackageDownload

Upload Package

Customization PackageUpload

Upload Logo

Upload Logo FileUpload

Logo Clickable URL

Inheritance

Inherit from Central Package☐

Main Principles and Differences between Primo and Primo VE

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Main Principles and Differences between Primo and Primo VE

Union view

- Primo VE has a built-in union view
- This view is neutral and will display all holdings as "other institution holdings" and will offer View It services only for materials that are available for all in the NZ
- When users attempt to sign in, they will be prompted to sign-in to a specific institution





How to transfer network functionality from Primo to Primo VE?

Start with Preparation

- **Step 1:** Determine Configuration Needed at the Consortia Level
- **Step 2:** Determine Configuration Needed at the Institution Level



Step 1: Determine Configuration Needed at the Consortia Level

- Check normalization rules
 - Local fields
 - Display fields
 - Local resource types
- Central package
- Union view



Step 2: Determine Configuration Needed at the Institution Level

Scopes

- Institutional records
- Entire network records

Views display functionality

- Facets
 - ✓ Held by library in the Availability top-level facet
 - ✓ Library facet
 - ✓ Institution facet
- Get it and View it from other institutions



Continue with Configuration

1. Create Local and Display Fields in the NZ
2. Create Local Resource Types in the NZ
3. Create Scopes in the NZ
4. Define Discovery Network Settings in the View



Step 1: Create Local and Display Fields in the NZ

- Create local fields Centrally from the NZ
- **local_field_51** through **local_field_100** only

Manage Display and Local Fields

1 - 3 of 3 + Add field Apply rules 🔍 ⚙️

	Field	Display label	Updated by	
1	contents	Contents	primove	...
2	local_field_01	Scale	primove	...
3	local_field_51	Theses	primove	...

Edit
Distribute
Delete



Step 1: Create Local and Display Fields in the NZ

- Create local fields Centrally from the NZ
- **local_field_51** through **local_field_100** only

Confirm

Are you sure you want to distribute the local field to all members?

Distribution mode

Q Look-up or select

Do not override member institution customization

Override member institution customization

Cancel Confirm



Step 2: Create Local Resource Types in the NZ

- Define Resource Types Centrally
- If member institutions decide to configure the same resource type, their customizations will override the settings of the NZ



Step 3: Create Scopes in the NZ

Select population

- My Institution
- Entire Network

< Define a Custom Scope

Cancel

Save

Scope Details

Code * ALL_PYSICAL

Description

Name * Entire Network Physical

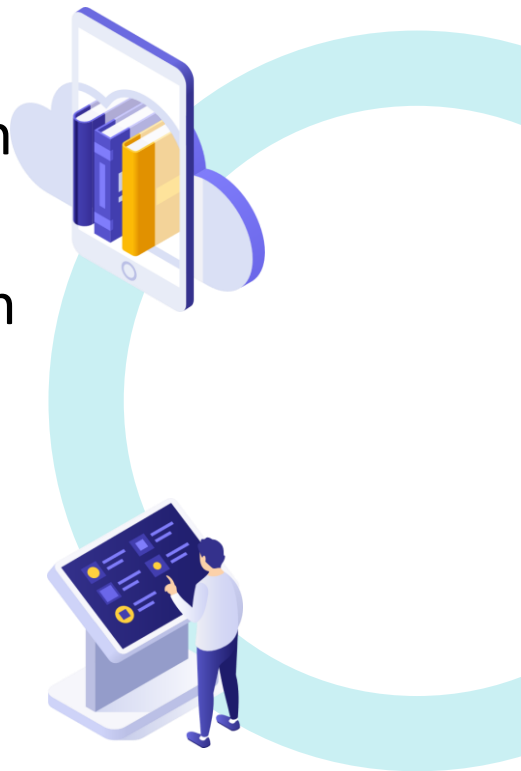
Scope Population ☐ My Institution

☒ Entire Network

Step 3: Create Scopes in the NZ

Specify the conditions

- The conditions for the **My Institution** population are like single institution
- The conditions of the **Entire Network** population are based on the following categories:
 - Entire Network Inventory
 - Other Institution Inventory
 - Metadata



Scopes in the NZ Example

[Define a Custom Scope](#) [Cancel](#) [Save](#)

Scope Details

Code *

Name *

Description

Scope Population ☐ My Institution ☒ Entire Network

Scope Conditions

[Clear Conditions](#) [+ Add a Condition](#)

-	Available Physical	Exists	-
---	--------------------	--------	---

Up to three conditions can be defined

Search Index

Entire Network Inventory : Available Physical

Other Institution Inventory : Other Institution

Entire Network Inventory

Other Institution Inventory

Metadata

And

[Add Condition](#)

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Step 4: Define Discovery Network Settings in the View

- On the View Configuration page, define the settings that are specific to consortia



< View Configuration

BackSave

GeneralLinks MenuSearch Profile SlotsAdvanced Search ConfigurationBrief ResultsBrief Record DisplayFull Record ServicesManage Customization Package

Define View

Code * EXLDEV1_INST:Alma

Name * Alma

Description

Affiliate with ☒ Campus ☐ Library

Campus The Main Campus

General Attributes

Time-out URL

Timeout (in minutes) for signed in users * 30

Side bar (Tweak my results) position On the right

Select as Default View ☒

Enable Syndetics Unbound ☒

Display link to Newspapers Search ☒

Use Voice Search ☒

Use UI supported languages

Display online services from other campuses/libraries None of these

Enable recent scopes search ☐

Timeout (in minutes) for guest users * 0

Default Language * English

Auto Complete Enabled ☒

Enable the 'Personalize Your Results' service ☒

Enable Collection Discovery Features ☒

Highlight reference entry on top ☒

Related records display ☒

Enable Edit My Library Card ☒

Set focus on search box ☐

Enable QR On Top ☒

Discovery network settings

Display locations from member institutions ☒

Display online services from member institutions ☒

include member institution physical inventory in facets ☐ Never ☐ Only in cross institution search ☒ Always

Library Facet ☐ Do not display member libraries ☒ Display member libraries separately ☐ Display member libraries with my institution libraries



FAQ

FAQ

Question:

How do we start the “Go VE” process as a network?

Answer:

At first, the Go VE option appears only in the Alma NZ.

After Go VE is activated in the NZ, the Go VE option is made available in all the member institutions.

FAQ

Question:

Can we use local fields that are used by other institution in the NZ?

Answer:

If a member institution of a consortium is using a local field, the same local field should not be used by other member institutions unless they are using the same normalization rules or the MARC21/UNIMARC Fields mapping method

FAQ

Question:

How to create local resource types for records that are available in my institution but are cataloged in the NZ?

Answer:

You should create them centrally in the NZ



Questions?



Thank you!

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