Go VE - Become an Expert

Go VE for NZ consortia

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March 2021

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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

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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

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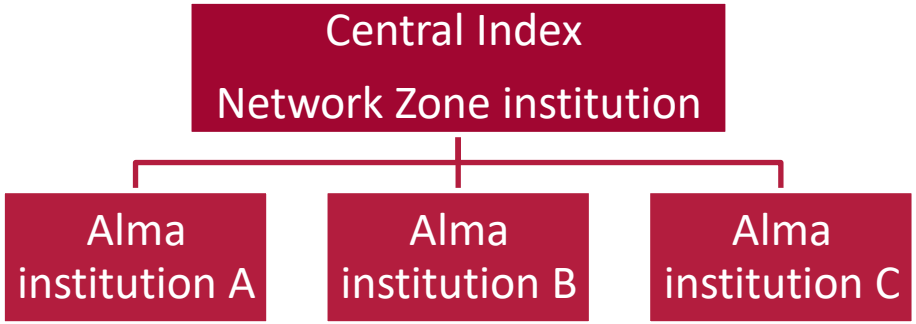
Main Principles and Differences between Primo and Primo VE

- **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

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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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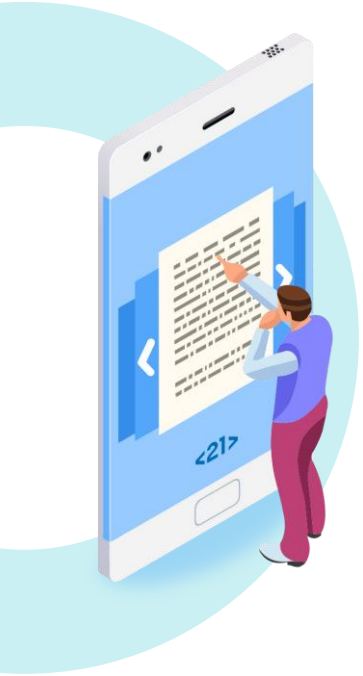
View it from other institutions/campuses service



- 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

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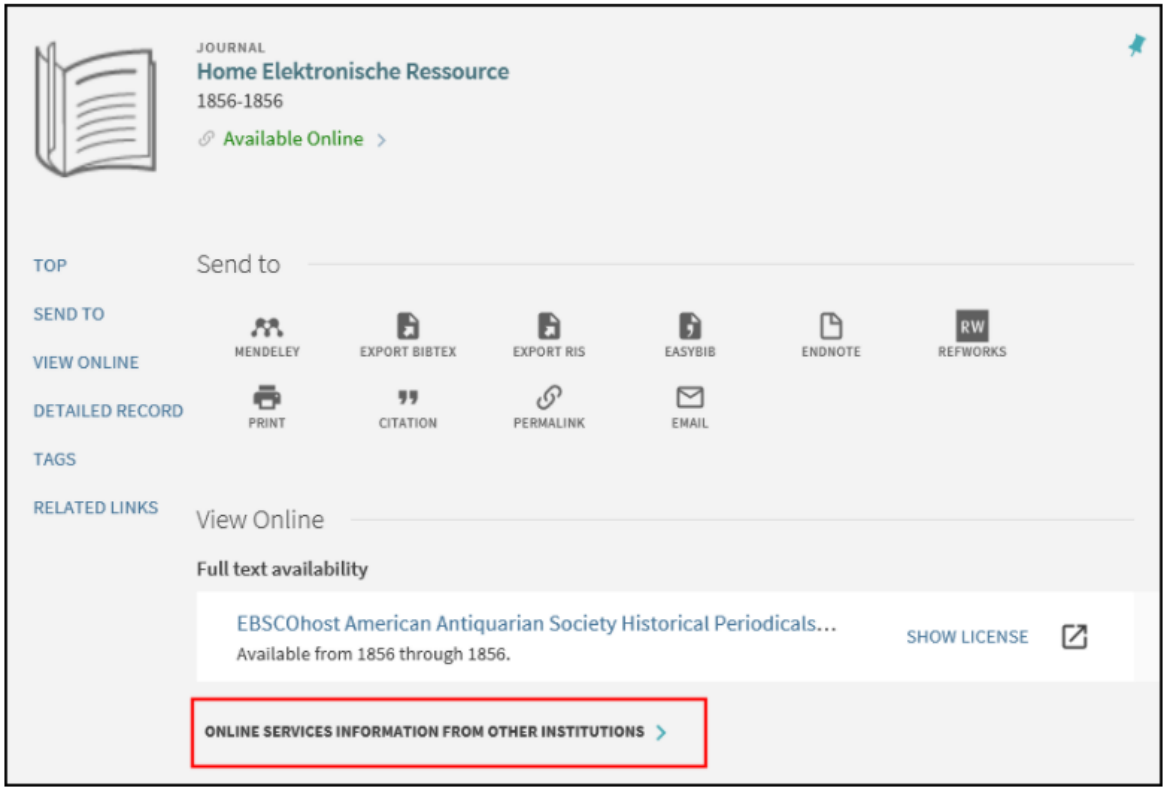
View it from other institutions/campuses service



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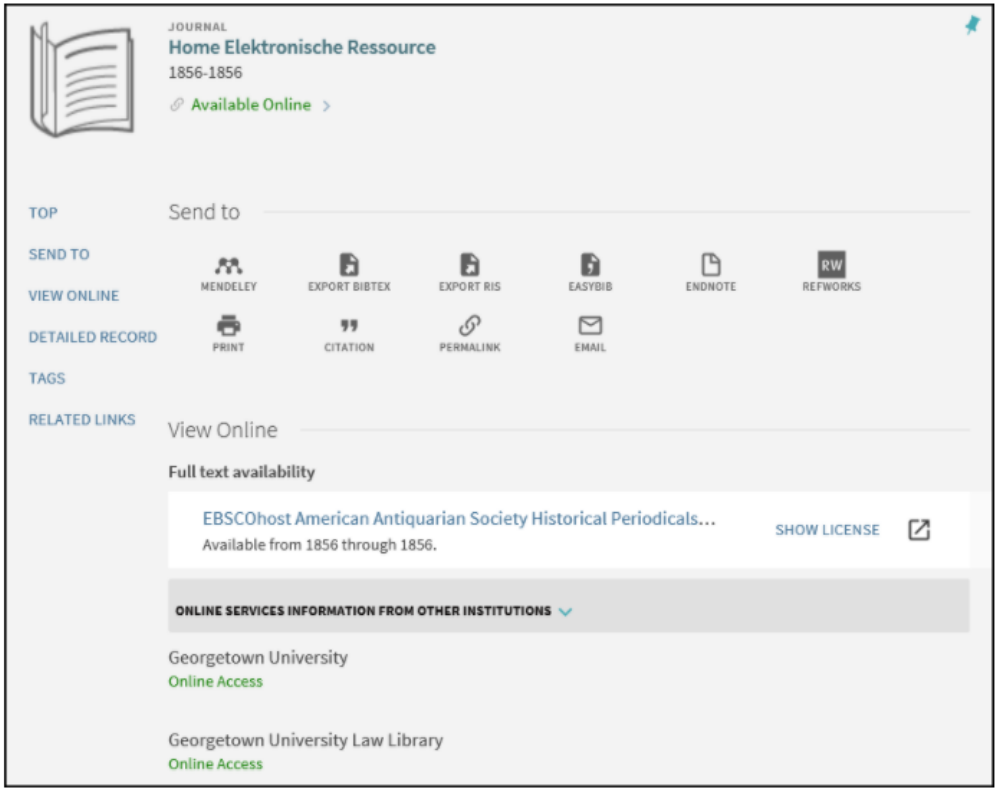
View it from other institutions/campuses service



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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

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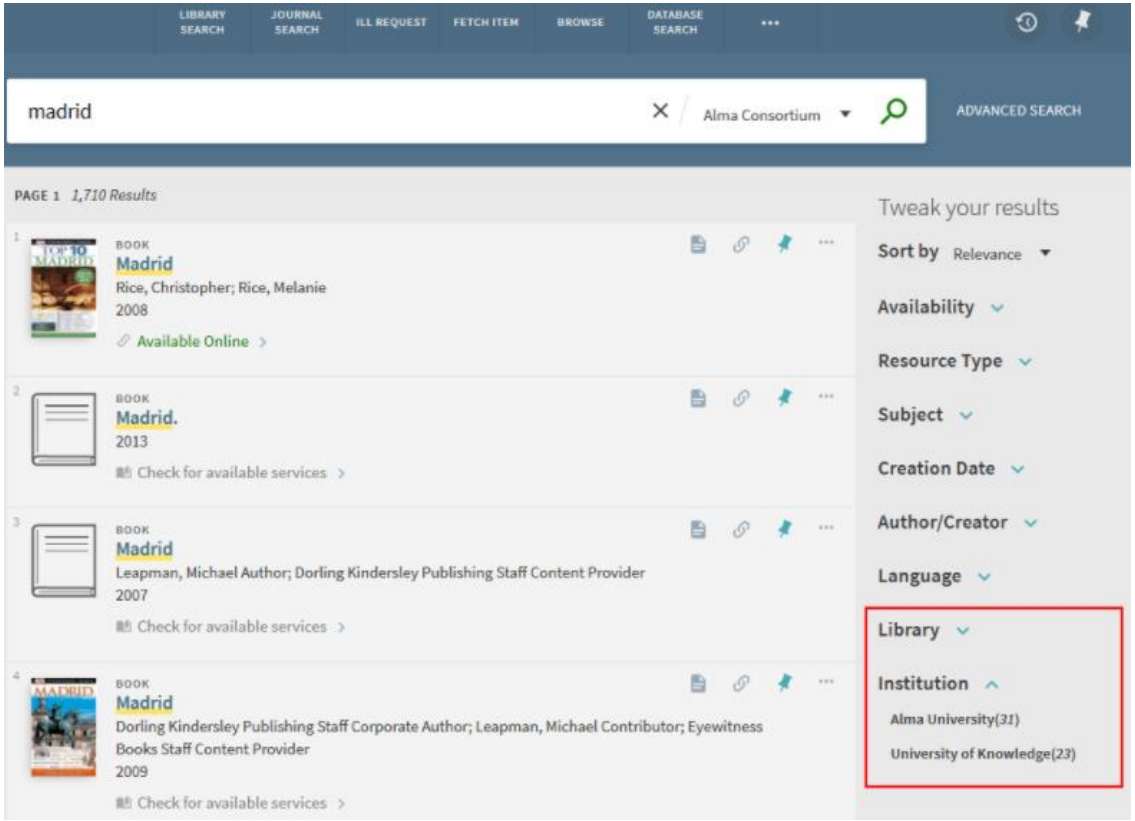
Dedicated consortium facets



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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

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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

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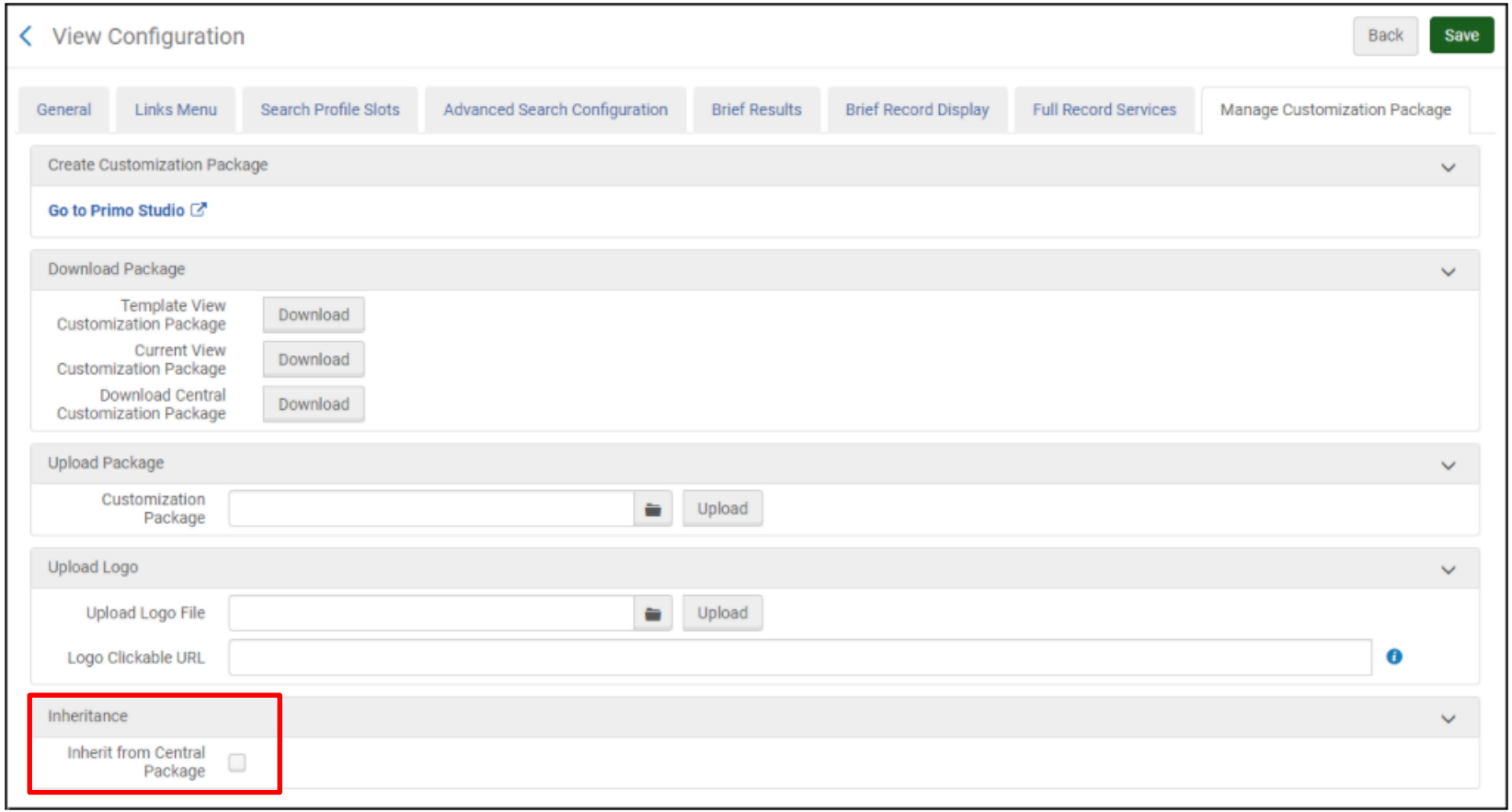
The Central Package



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Main Principles and Differences between Primo and Primo VE

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- **Union view**

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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

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How to transfer network functionality from Primo to Primo VE?

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Start with Preparation

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

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Step 1: Determine Configuration Needed at the Consortia Level

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

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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

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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

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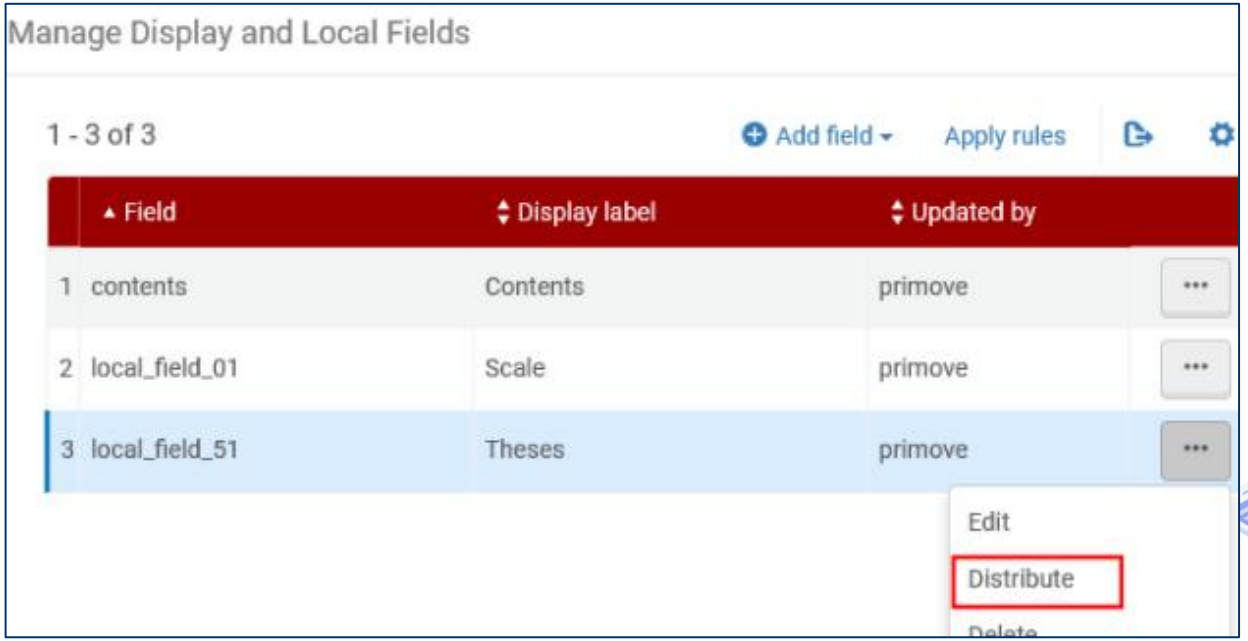
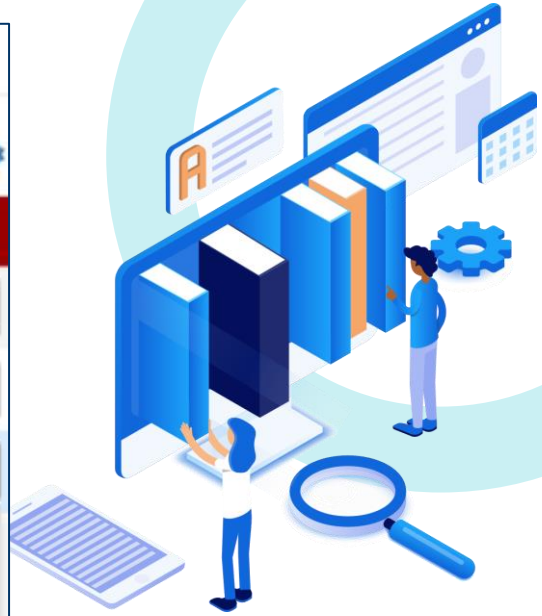
Step 1: Create Local and Display Fields in the NZ

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





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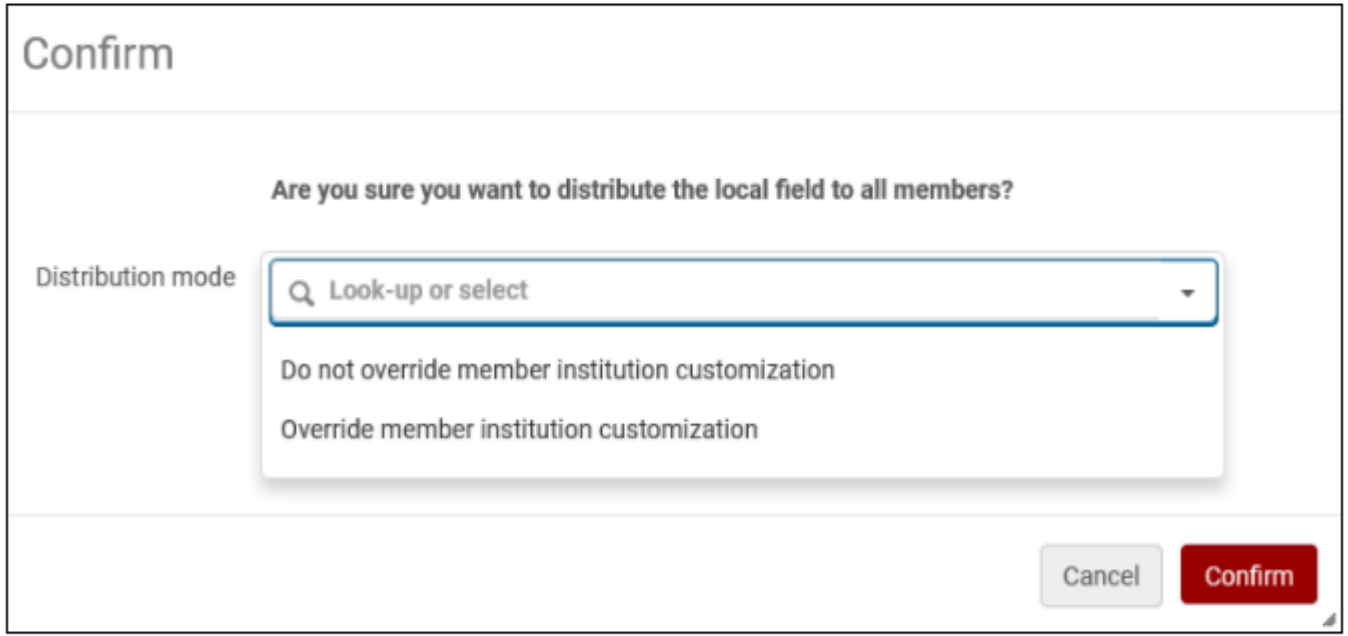

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Step 2: Create Local Resource Types in the NZ

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

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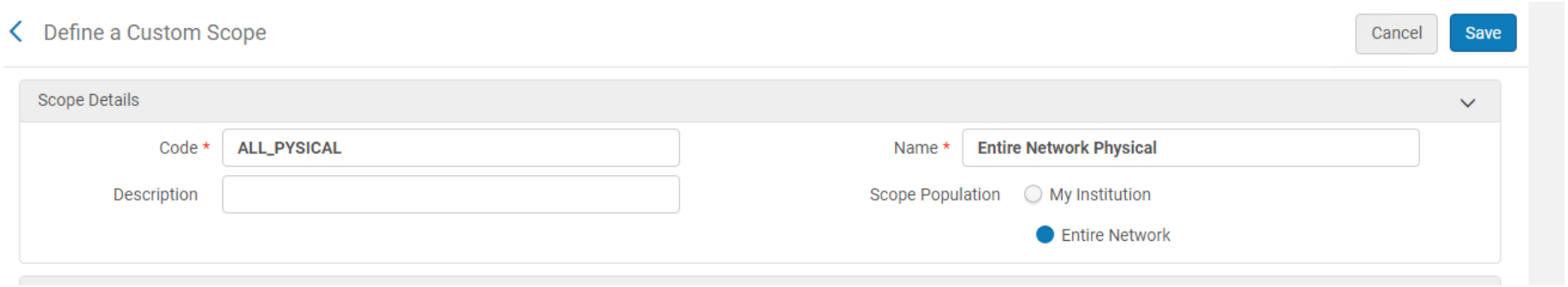
Step 3: Create Scopes in the NZ

Select population

- My Institution
- Entire Network



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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

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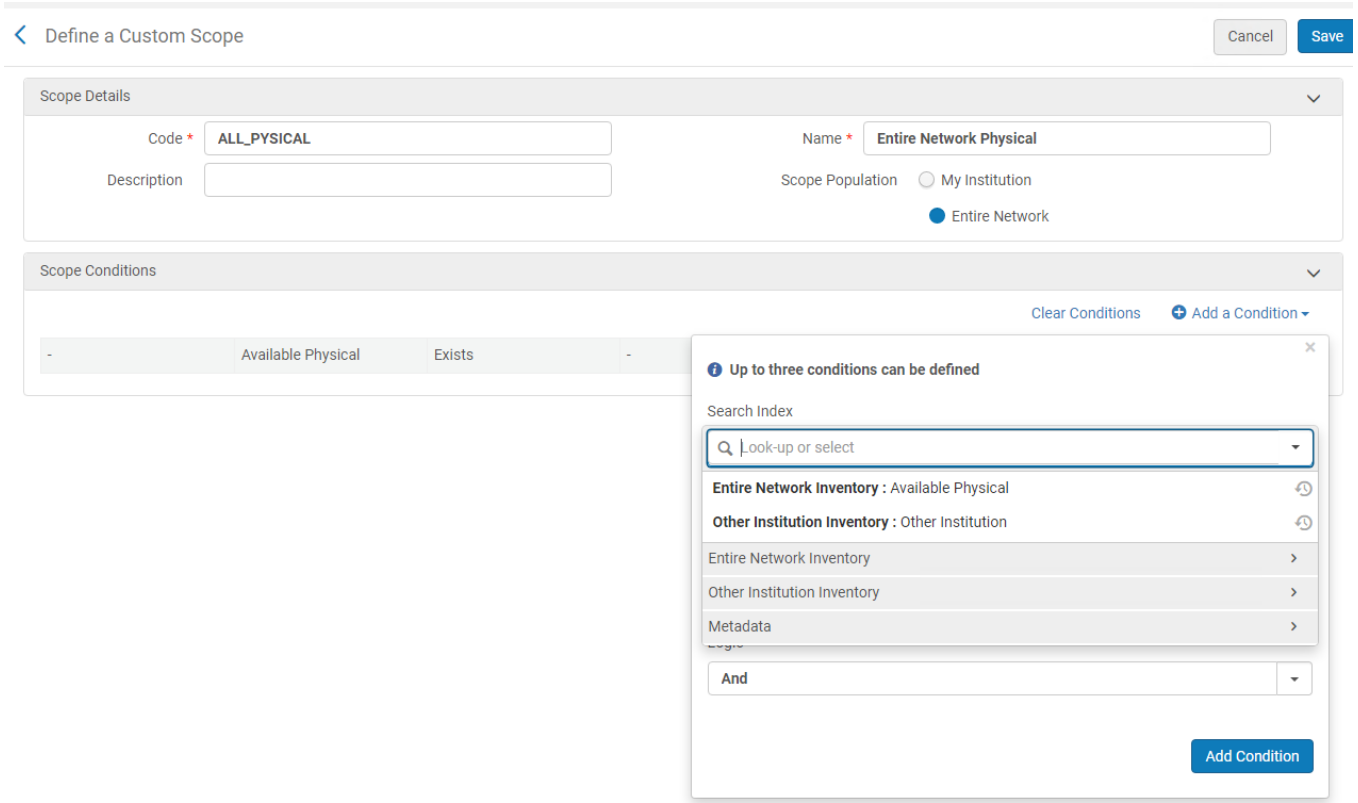
Scopes in the NZ Example



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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

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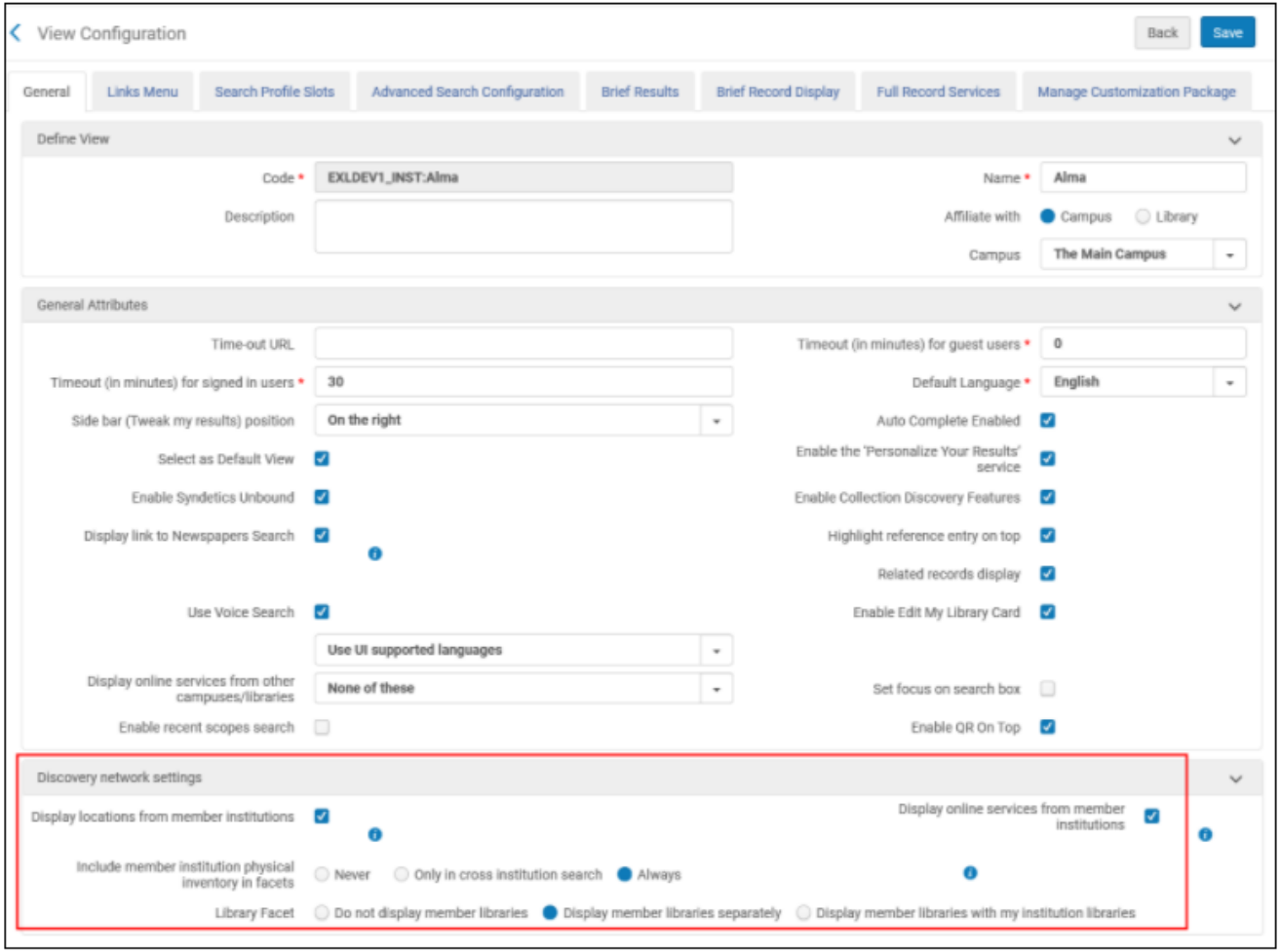

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FAQ

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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.

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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

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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

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Questions?

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Thank you!

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