

Primo norm rules overview

Definitions

Primo Back Office (BO): website where Primo is configured. You need a separate login for the back office. There are two back offices: one for the sandbox and one for production.

Sandbox BO url: https://calstate-primosb.hosted.exlibrisgroup.com:1443/primo_publishing/admin/acegilogin.jsp

(Access to the back office is restricted by IP range so you can only access the Primo back office from work. I have created logins and passwords for each of you and I'll send a separate email with your credentials.)

Primo normalization rules: configurations in the back office that take Marc data and transform it into Primo Normalized XML ([PNX](#))

Primo renorm: A renormalization of Alma data. All Alma data is re-indexed and digested into Primo. A renorm implements additions and/or modifications to Primo norm rules.

Primo sandbox: a place to test Primo configurations and normalization rules.

The Primo sandbox gets its Marc data from generic Exlibris records and some records contributed by CSU libraries during migration. Generally, changes to Primo are tested in the sandbox first and then carried over to production.

Primo production: real-live Primo, the Primo that library users see and use

Links to CSU production and sandbox instances of Primo

<https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/78291823/CSU+Primo+Instances>

Exlibris documentation

Training videos to become familiar with the back office and navigating it

Getting Started

https://knowledge.exlibrisgroup.com/Primo/Training/Primo_Training/Introduction_to_Primo/Getting_Started

Videos:

- 01 Introduction to Primo,
- 02 What is Discovery and Delivery and
- 04 Introduction to Primo PNX and Publishing.

Primo Certification (you don't need to be Primo certified (I'm not), this is just the name of the webpage)

https://knowledge.exlibrisgroup.com/Primo/Training/Primo_Training/Primo_Certification

Videos:

- 01 Primo Back Office Overview,
 - 05 Primo Normalized XML (PNX),
 - 06 Normalization Rules Overview,
 - 07 Normalization Rules Configuration
-
-
-

Knowledge center articles

Editing Primo norm rules

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/040Editing_Normalization_Rules_Sets

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/070How_to_Edit_the_Normalization_Rules

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/040Editing_Normalization_Rules_Sets#The_Top_of_the_Normalization_Set_Editor_Page

Using conditions (true, false, and, or) in norm rules

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/070How_to_Edit_the_Normalization_Rules#ww1050215

ULMS wiki documentation

Systemwide decisions on local fields (59x, 69x and 9xx) and display in Primo

<https://calstate.atlassian.net/wiki/spaces/ULMST/pages/78172584/Local+Fields+in+Alma+Primo>

Suppressions or display of other Marc fields in Primo

<https://calstate.atlassian.net/wiki/spaces/ULMST/pages/66420849/Suppression+or+Display+of+MARC+Fields+in+OCLC+Records+in+Primo>

Primo norm rules joint task force wiki page

<https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/638550051/Primo+norm+rules+overview>

OCLC documentation

Bibliographic formats and standards (BFAS) for looking up Marc fields and subfields

<https://www.oclc.org/bibformats/en.html>

Marc fields and subfields indexed by OCLC in Worldcat (can use to determine if we should index as well)

https://help.oclc.org/Librarian_Toolbox/Searching_WorldCat_Indexes/Fields_and_subfields

Systemwide vs local configurations

Some things in Primo can be configured locally by each campus, other configurations are systemwide and require consensus.

For example, norm rules for Alma Marc data (which is primarily what our task force deals with) are systemwide. The edition statement is taken from marc field 250 subfield a and b. This is systemwide.

Individual campus libraries have some customization options. They can choose to display or not display the edition statement in Primo's full record view. They can also choose to add the edition statement to Primo's brief results.

For details, see <https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/586416144/Display+Fields+in+Primo+full+record+view>
<https://trello.com/c/wgvLhJ5s/121-95-move-the-edition-details-up-near-the-author-and-year-above-the-find-it-and-get-it-tabs-it-is-currently-buried-too-far-down-6>

Challenges

balancing the requests of one campus vs the system as a whole

displaying informative Marc fields in Primo vs cluttering up the display

If we index too many Marc fields will this introduce undesired behavior in Primo search results?

When adding a new Marc (sub)field to norm rules, examine the Marc (sub)field. What info does it contain? How is it formatted?

For example, we added a norm rule for Marc 563 (binding info) but some binding info is institution-specific (contains subfield 5).

There is a policy to suppress institution specific data from Primo.

<https://calstate.atlassian.net/wiki/spaces/ULMST/pages/66420849/Suppression+or+Display+of+MARC+Fields+in+OCLC+Records+in+Primo>

[d](#)

[s+in+Primo](#)

Therefore, the norm rule was modified to not display 563 fields with a \$5.

Rule group display_description

Source Type: MARC Field: 563 Ind1: Ind2: Subfield: Include a Enabled

Conditions logic

Conditions + True

Condition 1 - Logic False

Condition 1 - Source Type: MARC Field: 563 Ind1: Ind2: Subfield: Include 5 Success If: Match Current

34

Condition1 - Routines + **General Parameter**

Routine

Input exists

Parameter

Transformations +

Transformation

Copy As Is Parameter

Behavior

Action ADD

Work overview

The Primo norm rules groups mainly deals with the display and indexing of Marc fields and subfields.

There is a long-term project to review and possibly re-consider the Marc fields that do/don't display and are/aren't indexed.

<https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/638550051/Task+force+overview>

We receive requests from campuses

(<https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/142639122/Norm+Rules+Joint+Task+Force>), evaluate and implement the requests, while considering the challenges mentioned above.

Occasionally, we'll deal with other areas of Primo. For example, recently we [re-aligned Primo facets and formats](#). Formats are the material types (DVDs, Audio CDs, Blu-Rays, Atlases, Web Sites...) described in the bibliographic record. We also re-configured that facets (search limiters that display on the left side in Primo) based on the new and revised formats.

There is another long-term project exploring the possibility of enriching headings from Alma to Primo.

<https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/638550051/Task+force+overview>

When testing a norm rule, you'll always start in the Primo sandbox. You find a record in the Primo sandbox search results. (This will be the record you'll test your norm rules on.) Then in the sandbox back office you edit and/or add the norm rules.

For example, I want to display the Marc [310](#) field, current publication frequency, which currently does not display.

First, I need to find a record in the sandbox that has the 310 field.

<https://calstate.atlassian.net/wiki/spaces/ULMSD/pages/78291823/CSU+Primo+Instances>

I know that serials use the 310 to indicate the journal's publication frequency (annual, quarterly, monthly...)

So basically, I search Primo for a journal with a 310 in its bib record.

(This can be a time-consuming task because basically you're searching Primo for bib records that have a specific field but you can't limit your search to that specific field.

This is a situation when you can use your cataloging skills. For example, I need to find a bib record with a 505 contents note. I know that a monograph of short stories usually would have a 505 note listing the titles of each story so maybe I'll search Primo for "short story.")

I found a title, Journal of the State Bar of California (oclc 01696037, issn 0039-002X).

[https://csun-primosb.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL\\$ _ALMA71385912010002901&context=L&vid=01CAL\\$ _UNO&search_scope=EVERYTHING&tab=everything&lang=en_US](https://csun-primosb.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL$ _ALMA71385912010002901&context=L&vid=01CAL$ _UNO&search_scope=EVERYTHING&tab=everything&lang=en_US)

Marc record has 310 field

```
245    00$aJournal of the State Bar of California.
246    1#$iTitle varies slightly, May/June 1966-1971:$aJournal
260    ##$aSan Francisco, Calif. :$bState Bar of California,$c1942-1971.
300    ##$a30 v. ;$c23 cm.
310    ##$aBimonthly
362    0#$aVol. 17, no. 3 (Mar./Apr. 1942)-v. 46, no. 6 (Nov./Dec. 1971).
500    ##$aTitle from cover.
```

Primo full record view confirms that the 310 is not currently displayed.

Details

Title	Journal of the State Bar of California.
Other Titles	Journal
Subjects	State Bar of California -- Periodicals > Bar associations -- California -- Periodicals >
Notes	Title from cover.
Related Titles	Earlier Title: State bar journal of the State Bar of California Later Title: California State bar journal Online version: Journal of the State Bar of California
Publisher	San Francisco, Calif. : State Bar of California
Creation Date	1942-1971
Format	30 v. ; 23 cm..
Contributors	State Bar of California. >
Identifier	ISSN : 0039-002X LC : KF200 .C33 LC : K23 .T37 LC (local) : K3 .A4
Language	English
OCLC Number	01696037
Institution Zone ID	991002235319702914
Network Zone ID	991059858159702901
Earlier Title	State bar journal of the State Bar of California
Later Title	California State bar journal
Source	California State University

I've found my test record and took a screenshot of what the Primo record looks like before I made any changes to the norm rules.

(Optional: You may want to find additional records, especially if your norm rule is complex (displays multiple subfields, or transforms subfields)).

Back Office walkthrough

sandbox back office: https://calstate-primosb.hosted.exlibrisgroup.com:1443/primo_publishing/admin/acegilogin.jsp



**ExLibris
Primo**

Primo August 2018 Release:
A Path to Discovery

Tour du Mont Blanc
Europe's Classic Long-Distance Trail
Ascend and descend through parts
of three countries on Europe's classic
170km trail.

Login User:
mjun

Password:

Login

Most of your work will be in Local Data, Normalization Sets.

CalState Sandbox Primo Back Office

09/16/18 10:10:55 (Server Time) [About!](#) [Logout!](#) [Help](#)

Welcome to Primo Back Office - monitor and configure your settings

ExLibris Primo

Home | **Deploy & Utilities** | General | **Local Data** | Publishing | FE & Delivery | Search Engine | Hello mjun

- Data Sources
- Scope Values
- Normalization Sets**
- Enrichment Sets
- Publishing Mapping Tables
- Restricted Search Scopes
- Restricted Delivery Scopes

Monitoring & Maintenance

- > **Monitor Primo Status**
Stay in control with one glance of all
- > **Primo Utilities**
Cleanup procedures and More
- > **Primo Reports**
View available reports or catalog a n
- > **Schedule Tasks**
Schedule Primo tasks such as harvesting, reloading indexes and more
- > **PNX Viewer**
Browse PNX files

Pipes: OK Processes: OK Search: OK DB/FS/

Hour	Total Searches (Blue Line)	Total Searches (Green Line)
01	4	0
02	1	0
03	5	1
04	3	0
05	3	0
06	2	5
07	2	0
08	4	0
09	2	0

> [Deploy All](#)
Deploy all

In the list of normalization rules sets, look for Owner: Installation, Normalization Rules Set Name: 01CAL5_ALMA, Normalization format: marc

> Normalization Rules Sets

Normalization Rules Sets

Owner:

Display Template NR

Owner	Normalization Rules Set Name	Version	Description	Normalization Rules Format				
California State University, Northridge	01CAL5_UNO_SCHOLARWORKS2	9		dublin_core	Edit	Deploy	Test	Delete
California State University, East Bay	01CAL5_UHL_Dspace	9		dublin_core	Edit	Deploy	Test	Delete
California State Polytechnic University, Pomona	Test953	24		marc	Edit	Deploy	Test	Delete
California State Polytechnic University, Pomona	01CAL5_PUP_BS	10		dublin_core	Edit	Deploy	Test	Delete
California State Polytechnic University, Pomona	01CAL5_PUP_BST	10		dublin_core	Edit	Deploy	Test	Delete
California State University, San Bernardino	01CAL5_USB_IR	9		dublin_core	Edit	Deploy	Test	Delete
Installation	01CAL5_DSPACE	9		dublin_core	Edit	Deploy	Test	Delete
California State University San Marcos	01CAL5_USM_DSPACE	9		dublin_core	Edit	Deploy	Test	Delete
California State University, Northridge	01CAL5_UNO_ASPLACE2	9		dublin_core	Edit	Deploy	Test	Delete
California State University, San Bernardino	01CAL5_USB_WRCA	18		marc	Edit	Deploy	Test	Delete
California Polytechnic State University, San Luis Obispo	01CAL5_P5U_SP	9		dublin_core	Edit	Deploy	Test	Delete
Installation	01CAL5_ALMA	24		marc	Edit	Deploy	Test	Delete

There are various norm rule sets (including Dublin Core) but our group will focus on the Primo norm rules for Marc data from Alma.

When you're editing the 01CALIS_ALMA norm rules, you'll see a dropdown for PNX section. We'll focus on the Display and Search sections.

CalState Sandbox Primo Back Office

Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard > Normalization Rules configuration

Home | Deploy & Utilities | General | Local Data | Publishing | FE & Delivery | Search Engine

> **Manage Normalization Rules**

Normalization Rules Set: 01CALIS_ALMA

PNX Section: Control, **Display**, Links, Search, Sort, Facets, Dedup, FRBR, Delivery And Scoping, Enrichment, Ranking, Additional Data, Browse

Normalization Rules Set Attributes

Set Name: 01CALIS_ALMA
Version: 24

Set Description: Enable:

Normalization Rules for PNX Section display in Normalization Rule 01CALIS_ALMA

To see a PNX record and its various sections, please see the following sample record.

https://csun-primosb.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CALIS_ALMA71385912010002901&context=L&vid=01CALIS_UNO&lang=en_US&tab=everything&showPnx=true

For more info on PNX records and how to view them, see

<https://docs.google.com/document/d/1FSV394wHtn2MGP2hIxxjWA6RSwiEY1VNB8TICvTiYD-g/edit#heading=h.lesu0hzd14lt>

Practice

In the PNX section, Display which of the following Marc fields display and if so, which subfields are displayed?

(Hint: Use Ctrl + F in your browser to search for the specific Marc field tags.)

<u>Marc</u>	<u>Display?</u>	<u>Subfields</u>
020	Yes	<i>a</i>
242	No	
263		
340		
348		
351		
362		
380		
541		

Adding a norm rule

When you're adding a new norm rule, first you have to find the PNX field/section (ex: display:title, display:publisher...) that it best fits under.

For example, I want to add the 310 field (current publication frequency) along with the other 3xx fields.

In the list of norm rules, I search for the 300 marc field and find that it and other 3xx fields are included in the display:format PNX field.

The screenshot shows a configuration interface for norm rules. On the left, a search bar contains the text "display:format" and the number "1". The main area displays a table of norm rules. The table has columns for "Type", "Field", "Ind1", "Ind2", "Subfield", and a description of the rule. The "Field" column contains MARC field numbers (300, 343, 345, 351, 347, 346, 344, 342, 340). The "Subfield" column contains asterisks or letters (a, b). The description column contains phrases like "MERGE- Merge to single PNX field" and "Add single PNX field". At the bottom right, there is a date and time stamp "2018-07-23 15:32:54.0" and an "Edit" button.

Type	Field	Ind1	Ind2	Subfield	
MARC	300			*	MERGE- Merge to single PNX field
Type	Field	Ind1	Ind2	Subfield	
MARC	343			a,b	MERGE- Merge to single PNX field
Type	Field	Ind1	Ind2	Subfield	
MARC	345			a	MERGE- Merge to single PNX field
Type	Field	Ind1	Ind2	Subfield	
MARC	351			*	Add single PNX field
Type	Field	Ind1	Ind2	Subfield	
MARC	347			a,b	MERGE- Merge to single PNX field
Type	Field	Ind1	Ind2	Subfield	
MARC	346			a	MERGE- Merge to single PNX field
Type	Field	Ind1	Ind2	Subfield	
MARC	344			a,b	MERGE- Merge to single PNX field
Type	Field	Ind1	Ind2	Subfield	
MARC	342			a	MERGE- Merge to single PNX field
Type	Field	Ind1	Ind2	Subfield	
MARC	340			*	MERGE- Merge to single PNX field mjun

Comments

2018-07-23 15:32:54.0 [Edit](#)

Order of fields, subfields

You'll notice that in the listing of the 3xx fields, the fields are in random order. I think that the Marc fields display in Primo based on their order in the bibliographic record. And I think the same applies to the display of subfields too.

For example, the Primo norm rule for the 505 field includes the subfields in alphabetical order: a,g,r,t.

Type	Field	Ind1	Ind2	Subfield
MARC	505			a,g,r,t

But in Primo, the subfields display based on their order in the bib record.

Primo example:

https://csun-primosb.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CALIS_ALMA71431773290002901&context=L&vid=01CALIS_UNO&search_scope=EVERYTHING&tab=everything&lang=en_US

Marc record

505 00 \$t Cordials /\$r David Kranes --\$t The pension grillparzer /\$r John Irving...

Primo display

Contents

Cordials / David Kranes -- The pension grillparzer / John Irving -- Going after Cacciato / Tim O'Brien -- Rough strife / Lynne Sharon Schwartz -- The fat girl / Andrew Dubus -- Home / Jayne Anne Phillips -- Levitation / Cynthia Ozick -- Pretend dinners / W.P. Kinsella -- Lost

If I'm mistaken or you find evidence to the contrary, please let me know so I can update this google doc.

For the 310 field, I will edit the rules in display:format.

CalState Sandbox Primo Back Office

09/16/18

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Pipe Configuration Wizard](#) > **Normalization Rules configuration**

[Home](#) | [Deploy & Utilities](#) | [General](#) | [Local Data](#) | [Publishing](#) | [FE & Delivery](#) | [Search Engine](#)

> Advanced Normalization Set Editor

Normalization Rules Set:

Section:

Field:

Normalization Rules for field format in PNX Section display in Normalization rules set 01CAL5_ALMA

Description:

Basic

[Enable all rules](#) | [Disable all rules](#)

Last Updated By: mjun

At: 2018-07-23 15:32:54.0

Comments:

Version: 1 (modified)

(Usually I add new norm rules below existing rules. When I'm testing I just find it easier to locate my rule if it's at the bottom.)

The last rule in display:format is rule 9. To add a new rule, click on the plus (+) icon which duplicates the current rule, instead of creating a blank rule. (It's weird but it's just one of the quirks of working in the back office.)

9

Rule group

Type **Field** **Ind1** **Ind2** **Subfield** Enabled


Conditions No conditions Specified

Transformations

Transformation **Parameter**

Behavior

Action



Rules (detail view)

12

Rule group

Source **Type** **Field** **Ind1** **Ind2** **Subfield** **Enabled**

Conditions No conditions Specified

Transformations

Transformation	Parameter
<input type="text" value="Add to beginning of string"/>	<input type="text" value="Publication frequency:^"/>
<input type="text" value="Copy As Is"/>	<input type="text" value=""/>

Behavior

Action

Exlibris documentation:

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/040Editing_Normalization_Rules_Sets

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/070How_to_Edit_the_Normalization_Rules

Rule group: no need to edit. the rule group is the PNX field you're working in. (in the example above, display:format)

Source: MARC. Our group only works with Marc data from Alma.

Field: the specific Marc tag. (Unfortunately, you can't use wildcards like (5** or 5xx). You have to specify each Marc tag by its numbers. It's frustrating but it's just how the back office works.)

Ind1, Ind2: where you can specify indicators. If blank, you're selecting any and all indicators.

Subfield: Include or Exclude. "Specify the subfields that you want to exclude or include". Use a comma to separate multiple subfields. Asterisk (*) is used to specify all subfields.

Enabled: You can enable or disable a norm rule with this checkbox. It's good to use when you want to preserve an existing norm rule but disable it. Then you can add a new norm rule to test. If the new norm rule fails or behaves unexpectedly, you can delete the new norm rule and enable the existing one.

Conditions: You can set up conditions that determine if a field displays or not. (You may not end up using conditions. If you need to use them, you can look at existing conditions in norm rules to find out how they work.)

The condition below looks for 655_7 where \$2 is lcgft.

Condition 1 - Logic	True					
Condition 1 - Source	Type	Field	Ind1	Ind2	Subfield	Success If
	MARC	655		7	Include	2
Condition1 - Routines	General Parameter					
	Routine					Parameter
	Check string equals string					lcgft

Transformation: You can take the Marc data as-is or make changes to it.

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/050Transformation_Routines

Examples: add to beginning of string, copy as is, lower case, remove characters from the end, upper case.

To add a space at the end of your string, use ^

Transformations +

Transformation

Add to beginning of string



Copy As Is



Parameter

Publication frequency: ^



Exlibris documentation says "Spaces are indicated by a ^."

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/050Transformation_Routines

Most of the time you'll be using "Copy as is". I don't think we'll be doing much complicated transformations of Marc data.

Action Behavior:

Add: adds a new "line" in Primo display for this norm rule

Or: only a single PNX field should be created. Once that field has been created, the system stops checking the remaining rules. (I've never used this.)

Merge: "merge all occurrences of the source fields to a single PNX field"

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/020Working_with_Normalization_Rules/040Editing_Normalization_Rules_Sets#The_Top_of_the_Normalization_Set_Editor_Page

In general use Add but this is something you can play around with and test in the Sandbox.

Test: There is an option to test your norm rule but it uses generic data. (And I also forgot how it works.)
I prefer to test on records I found in the Primo Sandbox. This does require a renorm (details below) but I like testing on real records.

Testing

Owner:

- MARC xml records
- MARC exchange records

Select a record

Edit Record

Test

[select all/deselect all](#) rules for testing.

After you finalized your norm rule, you save.

The screenshot shows a configuration interface for a rule group. The main area is titled "Rule group" and contains the following sections:

- Rule group:** A text input field containing "display_format".
- Source:** A dropdown menu set to "MARC".
- Field:** A text input field containing "310".
- Ind1:** An empty text input field.
- Ind2:** An empty text input field.
- Subfield:** A dropdown menu set to "Include" and a text input field containing "a".
- Enabled:** A checked checkbox.
- Conditions:** A section with a plus icon and the text "No conditions Specified".
- Transformations:** A section with a plus icon and a table of transformations:

Transformation	Parameter
Add to beginning of string	Publication frequency: ^
Copy As Is	
- Action:** A dropdown menu set to "ADD".
- Behavior:** A section with a plus icon.

At the bottom of the interface, there is a "Go Back" button on the left and a "Save" button on the right, which is highlighted with a purple border. The "Save" button is orange with white text.

(The Back Office doesn't give you a confirmation message. You click Save and then it just reloads the webpage.)

Sandbox renorm

To see the effect of my new norm rule, I have to do a renorm.

For the procedure, complete steps #3 (Deploy norm rules) and #8 (Run renorm) here:

https://docs.google.com/document/d/1NG0Kv4zOXN1QsreHArI_EG7q7Jf4Lgtb0ILlp-0Xxcc/edit?usp=sharing

(I don't expect new members of the task force to do a renorm. Most of your work will be adding and editing norm rules and I will do the renorms. But I'm including the renorm procedure so you have an idea of the entire process.)

Production renorms take about 3 days (72 hours) while a sandbox renorm takes about 2 hours. This is another reason we test in the sandbox. It's much quicker to see the changes we made.)

Result

https://csun-primosb.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CALIS_ALMA71385912010002901&context=L&vid=01CALIS_UNO&search_scope=EVERYTHING&tab=everything&lang=en_US

The 310 field now displays under Format in Primo's full record display.

TOP

Details

TOOLS

Title

Journal of the State Bar of California.
Key title:Journal - State Bar of California

IN THE LIBRARY

Other Titles

Journal

LINKS

Subjects

[State Bar of California -- Periodicals](#) >
[Bar associations -- California -- Periodicals](#) >

DETAILS

Notes

Title from cover.

VIRTUAL BROWSE

Related Titles

Earlier Title: State bar journal of the State Bar of California
Later Title: California State bar journal
Online version: Journal of the State Bar of California

Publisher

San Francisco, Calif. : State Bar of California

Creation Date

1942-1971

Format

30 v. ; 23 cm..
Publication frequency: Bimonthly

Contributors

[State Bar of California.](#) >

Identifier

ISSN : 0039-002X
LC : KF200 .C33
LC : K23 .T37
LC (local) : K3 .A4
LCCN:sf 79010064

Language

English

OCLC Number

01696037

Institution Zone ID

991002235319702914

Network Zone ID

991059858159702901

Earlier Title

[State bar journal of the State Bar of California](#)

Later Title

[California State bar journal](#)

Source

California State University

Tips

Much of my experience in the Primo back office has been through trial and error and examining existing norm rules to create new ones.

Most of your work will be in the sandbox. At first I was afraid of ruining or seriously messing up Primo but that's why we have the sandbox.

You want to be careful when making changes (even in the sandbox) but not so careful that you're unable to test things out, make mistakes and learn from them.

You can always back up existing norm rules by printing to PDF the webpage of existing rules before you make any changes.

I also use screenshots to compare before and after.

Exercises

The following Marc fields currently do not display in Primo.

Each person will be assigned Marc fields.

Find sample records in the sandbox. Take a screenshot to compare the before and after.

Decide which PNX field/section (display: ...) and add a norm rule for the Marc field and decide which subfield(s) to display.

You can use the 310 example above as a guide. If you get stuck or need help, please contact me.

(This exercise is for practice. Normally before adding new norm rules we plan and discuss them as a group.)

- | | | | | |
|----------------|---------------------|------------------------------------|---------------------|---|
| 1. Pam | 010 | Library of Congress control number | 380 | form of work |
| 2. Lia | 222 | key title | 321 | former publication frequency |
| 3. Anna-Sophia | 336 | content type | 588 | source of description note |
| 4. Samuel | 210 | abbreviated title | 337 | media type |
| 5. Boutsaba | 028 | publisher or distributor number | 338 | carrier type |
| 6. ----- | 042 | authentication code | 362 | publication dates, sequential designation |

[787](#) — *other relationships*

Be sure to note where you added the norm rule and your norm rule's number. Later I'll remove your norm rules because they were added just for this exercise.

I'll do a sandbox renorm and you can see the result of your norm rule.

Update 11/05/18: Removed practice norm rules from sandbox then ran renorm.



Real-live request

Trello request #100 (mapping of local fields: 952, 953, 954)

<https://trello.com/c/6vqW2wnb/149-100-952-953-and-954-mapping-inconsistent-with-7xx-10-18-2018>

Background:

The [952, 953, and 954](#) are local 9xx fields designated for local added entry: personal, corporate and meeting name, respectively and correspond to the [700](#), 710 and 711 Marc fields, also respectively.

<u>Local field</u>	<u>Definition</u>	<u>Format like</u>
952	Local Added Entry–Personal Name	700
953	Local Added Entry–Corporate Name	710
954	Local Added Entry–Meeting Name	711

In the Primo back office norm rules for 01CALIS_ALMA in the PNX section: display there are two sections: `display:creator` and `display:contributor`.

`display:creator` is for agents with primary responsibility for the intellectual work (ex: author, e.g. Marc 1xx fields)

`display:contributor` is for agents who contribute to the intellectual work (ex: illustrator, e.g. Marc 7xx fields)

Currently, the 700, 710, and 711 fields fall under to `display:contributor`, but the equivalent local fields 952, 953, and 954 are under `display:creator`.

In Primo display the effect of this discrepancy is that 95x agents appear as creators in the Primo record.

Sandbox example:

https://cpslo-primosb.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=01CAL5_ALMA71380872850002901&context=L&vid=01CAL5_P5U&search_scope=EVERYTHING&tab=everything&lang=en_US

Note: Greg Ripa is displayed under the title, as if he were the author.



BOOK

The new transit town: best practices in transit-oriented development

Ripa, Greg, honoree.

©2004

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ITEM DETAILS

Send to



CITATION



PERMALINK



ENDNOTE



REFWORKS



EXPORT BIBTEX

Marc record view:

[https://cpslo-primosb.hosted.exlibrisgroup.com/primo-explore/sourceRecord?vid=01CAL\\$PSU&docId=01CAL\\$ALMA71380872850002901](https://cpslo-primosb.hosted.exlibrisgroup.com/primo-explore/sourceRecord?vid=01CAL$PSU&docId=01CAL$ALMA71380872850002901)

This bib record does not have any 1xx fields.

```
082      00$a388.4/0973$222
245      04$aThe new transit town :$bbest practices i
260      ##$aWashington, DC :$bIsland Press,$c©2004.
```

Hank Dittmar and Gloria Ohland (the editors) are 700 added entries for personal names.

```
655      #7$aCase studies.$2fast$
700      1#$aDittmar, Hank.
700      1#$aOhland, Gloria.
776      08$iOnline version:$tNew
```

Greg Ripa is a 952 local added entry (personal name) but in Primo displays as if he were a creator.

```
856      42$3Publisher description$uhttp://catdir.loc.
952      1#$aRipa, Greg,$ehonoree.$9LOCAL$A01CAL$PSU
968      ##$aPromptcat.$9LOCAL$A01CAL$_FUL
```

Greg Ripa should display in Primo as a contributor in the Item Details section, along with Hank Dittmar and Gloria Ohland.

TOP

Item details

SEND TO

Title

The new transit town: best pract

AT THE LIBRARY

Author

Ripa, Greg, honoree. >

ITEM DETAILS

Contributors

Hank Dittmar >

Gloria Ohland >

LINKS

Responsibility

edited by Hank Dittmar and Gloi

Subjects

Local transit -- United States -- C

VIRTUAL BOOKSHE

Land use, Urban -- United States

Transportation and state -- Unit

Therefore we will copy the existing norm rules (#19-24) in `display:creator` for 952, 953, and 954 to `display:contributor`. Then delete the existing norm rules (#19-24) in `display:creator`.

backup pdf of norm rules in `display:creator`

https://drive.google.com/open?id=1xvLd3xlkEsdo_pCXJvf0_6eOmTHVuDVS

952 rules 19-20

953 rules 21-22

954 rules 23-24