



CONFIGURING LOCAL FIELDS IN PRIMO VE FOR I-SHARE
JULY 21, 2025

Slides: <https://www.carli.illinois.edu/configuring-local-fields-primo-ve-i-share>

[Local Fields in Primo VE for I-Share](#)

Today's Agenda

- Brief overview of default Primo VE configurations for Display, Facets, and Search
- What are Local Fields for Primo VE?
- Which Local Fields have been set up for I-Share by CARLI?
- How to configure consortial Local Fields for Full Record display, Brief Record display, Advanced Search, and Facets
- Q&A

Presenters

- Jessica Gibson - Associate Director of System Services, CARLI
- Matt Short – Associate Professor, Head of Technical Services, Northern Illinois University
- Margaret Heller – Head of Digital Services, DePaul University

Ex Libris documentation:
[Mapping to the Display, Facets, and Search Sections in the Primo VE Record](#)

- Lists the default fields and MARC definitions mapped for display, facet, and search.
- However, not all default fields are **configured** for display, facet, and search out of the box.

Primo VE Display Field ^ v	MARC21/KORMARC Tags v
Edition, Imprint etc.	(250 3,a,b) (880-250 3,a,b)
Language	041 a, d, e OR 008 position 35-37
Creator	100 all subfields OR 110 all subfields OR 111 all subfields 880-100 all subfields OR 880-110 all subfields OR 880-111 all subfields
Uniform Title	130 all subfields OR 240 all subfields 880-130 all subfields OR 880-240 all subfields
Title	245 OR 130 (for journal) Details: If ldr position 6=a AND position 7=b OR i OR s take 130 a,d,f,k,l,m,n,o,p,r,s (if it exists) ELSE take: 245 a,b,f,g,k,n,p,s

A portion of the Primo VE mapping table for display.

Local Fields for Primo VE are additional MARC fields that can be configured to display and be used for searching and faceting beyond the default fields.

I-Share institutions can set up Local Fields for Primo VE in their Alma IZs, but in our shared consortial environment, Local Fields have effects beyond just your local Primo VE instance.



Background: Shared bib records are stored in the Alma Network Zone (NZ), while local details are stored in the institution zone (IZ). Local details include a library's inventory records--holdings, items, portfolios--and local bibliographic details such as notes and local headings that are relevant to the library's users.

A **Local Extension** is a MARC bibliographic tag that may be added to a shared NZ bib record via the Alma Metadata Editor, but the data in it is stored and visible only in the IZ copy of the bib record.

Local Extensions may be applied only for the following MARC fields:

090-099, 590-599, 690-699, 770-779, 780-789, 900-999

CARLI's consortial documentation on **Local Extensions**:

[How-To: Using Local Extensions for Copy-Specific Bibliographic Data](#)

[I-Share Common Definitions for Local Extensions](#)

Ex Libris documentation about **Local Extensions**:

[Adding Local Extensions to Bibliographic Records in the Network Zone](#)



Every I-Share library can use Local Fields numbered 1-50 in their IZ.

Some may have already been set up in your IZ by Ex Libris staff upon migration to Alma.

Consortial Local Fields are numbered 51-100.

These are configured centrally in the NZ and distributed to all IZs.

- I-Share libraries can choose to use them or not. How to set them up to use them will be covered later in this session.
- I-Share libraries may adjust the field names and definitions, if desired.
- The CARLI Discovery Primo VE Committee chose fields that we thought would help most libraries and that had been used in our previous VuFind system.
- If you have a suggestion for another consortial field, contact CARLI Support.

[Local Fields in Primo VE for I-Share](#) documents the consortial Local Fields.

- Open Alma Configuration (Ctrl + Alt + C)
- Local Fields can be found under Discovery > Display Configuration > Manage display and local fields
- **Review fields 1-50 (IZ) and 51-100 (NZ)**

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Manage Display and Local Fields

1 - 20 of 44 + Add field ▾ Apply rules  

	▲ Field	↕ Display label	↕ Updated by	
1	creator	Creator	01691506	
2	local_field_01	Notes	01691506	
3	local_field_02	Special Collection	01691506	
4	local_field_03	Donor	01691506	
5	local_field_04	Statement of responsibility	01691506	
6	local_field_05	Additional Notes	01691506	
7	local_field_06	More Notes	01691506	
8	local_field_51	Statement of Responsibility	Network	
9	local_field_52	Pub	Network	

1 of 3

Manage Display and Local Fields table in Alma Configuration

- Limited to 09X, 5XX, 69X, and 9XX (\$a only)
- Already indexed by Ex Libris
- Each can accommodate up to 20 MARC fields
- Note which fields have been configured in your IZ to avoid duplication when configuring for search/display
- If desired, edit the display label here

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Define a Local Field

Field to edit * **local_field_06** Display label * **More Notes**

Local field details

Enable field for search Use the parallel Local Field 01/50 from the Dublin Core record

Enable field for facet Use full text links for indexing

Use Translations

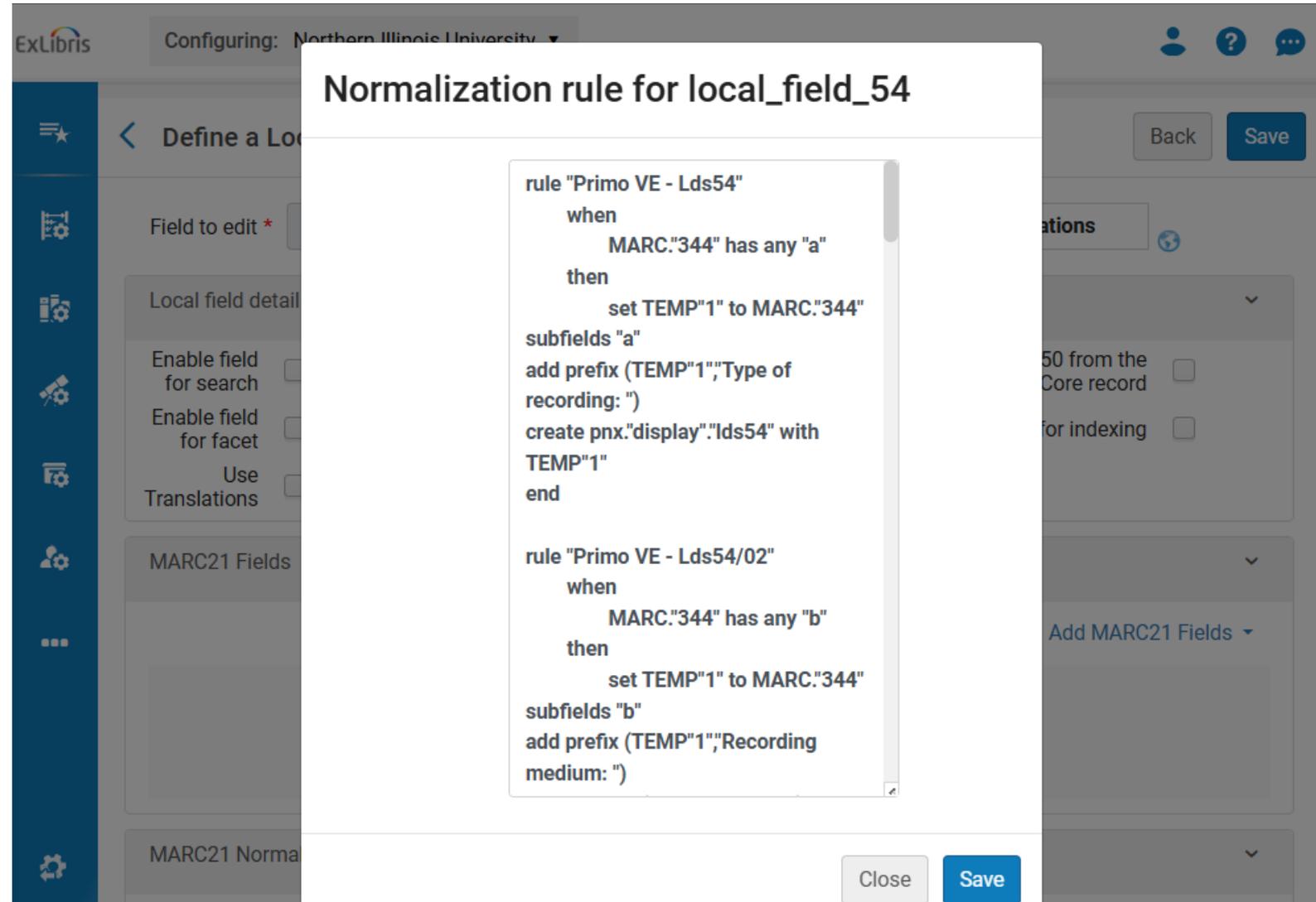
MARC21 Fields

1 - 13 of 13 + Add MARC21 Fields

MARC21 Field		
1	556	...
2	561	...
3	562	...

Options when defining a Local Field

- Normalization Rule fields consist of custom Norm Rules (HT Orbis Cascade)
- Not indexed automatically
- Norm Rules should not be edited in the IZ
- If there's a problem with an existing rule, please report to CARLI



The screenshot shows the ExLibris configuration interface for Northern Illinois University. A dialog box titled "Normalization rule for local_field_54" is open, displaying two rules. The background interface shows the "Define a Local Field" configuration page with options to enable fields for search, facet, and translations, and sections for MARC21 Fields and MARC21 Normalization.

```
rule "Primo VE - Lds54"  
  when  
    MARC:"344" has any "a"  
  then  
    set TEMP"1" to MARC:"344"  
  subfields "a"  
  add prefix (TEMP"1";"Type of  
recording: ")  
  create pnx:"display"."lds54" with  
TEMP"1"  
end  
  
rule "Primo VE - Lds54/02"  
  when  
    MARC:"344" has any "b"  
  then  
    set TEMP"1" to MARC:"344"  
  subfields "b"  
  add prefix (TEMP"1";"Recording  
medium: ")
```

Normalization Rule for local_field_54

- Open Alma Configuration (Ctrl + Alt + C) again
- Views can be found under Discovery > Display Configuration > Configure Views
- Duplicate your default View for testing

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Views List

1 - 6 of 6 + Add View

Code	Name	Description	Default
01CARLI_NIU:LOCAL	LOCAL	View for testing new Local Fields.	<input type="checkbox"/>
01CARLI_NIU:LAW	LAW-DEPRECATED	Default discovery view for Law Library. Law is using FML_DEFAULT moving forward.	<input type="checkbox"/>
01CARLI_NIU:FML_NO...	FML_NODEDUP	-	<input type="checkbox"/>
01CARLI_NIU:FML_DEF...	Default Discovery View	Default discovery view for NIU Libraries	<input checked="" type="checkbox"/>
01CARLI_NIU:DEV	DEV	Sandbox	<input type="checkbox"/>
01CARLI_NIU:CARLI_NIU	CARLI_NIU	-	<input type="checkbox"/>

Context menu for 'Default Discovery View':

- Edit
- Duplicate
- Override
- Delete
- Go to View
- More actions

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Options to Edit and Duplicate a Primo VE View

- Full Record Services > Details > Configure > Add Field
- Add fields, then click done. Multiple fields can be added to each row.
- Confirm field code and name to avoid duplication
- Should be immediately available in your test view

The screenshot shows the 'Row Fields' dialog box in the ExLibris interface. The dialog has a title bar 'Row Fields' and a '+ Add Field' button. Below the title bar is a table with the following structure:

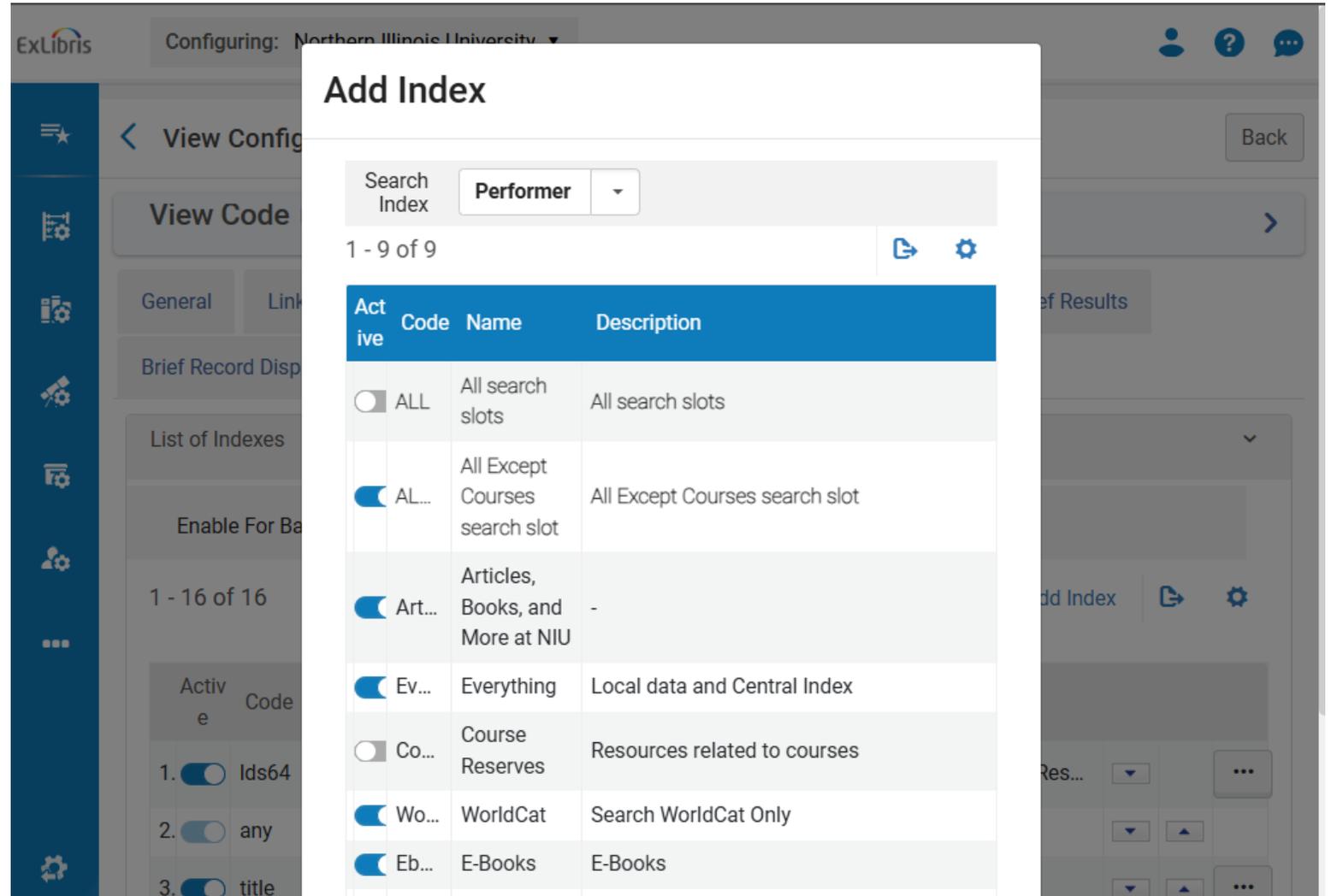
Active	Code	Name	
<input checked="" type="checkbox"/>	Ids87	Instrumentation	...

At the bottom right of the dialog is a 'Done' button. The background shows the 'Edit Full Display' configuration screen with a list of fields:

Fields		
1. Title ; Vernacular Title	▼	...
2. Other title	▼ ▲	...
3. Uniform title	▼ ▲	...
4. Creator ; Contributor	▼ ▲	...
5. Is Part Of	▼ ▲	...
6. Dissertation	▼ ▲	...

Add a Local Field to the Full Record Display

- Advanced Search Configuration > List of Indexes > Add Index
- Only fields configured for advanced search are available here.
- New indexes may not be immediately available, so wait before testing



Add a Search Index

- Brief Results > Facets > Add a Local Facet
- Only fields configured for facets will be available here
- Automatically enabled and in alphanumeric order
- Wait to test

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View Configuration Back

View Code 01CARLI_NIU:LOCAL

General Links Menu Search Profile Slots Advanced Search Configuration Brief Results

Brief Record Display Full Record Services Manage Customization Package

Facets

Restore + Add a Local Facet

Active	Code	Values to display	Sort Type	Search Profile Slot	Local Facet
1 <input checked="" type="checkbox"/>	Availability	5	By Size	ALL_NOT_CR	Musical Key
2 <input checked="" type="checkbox"/>	Resource type	0	By Size	ALL_NOT_CR	
3 <input checked="" type="checkbox"/>	Institution	0	By Size	Everything,WorldCatSearch	
4 <input checked="" type="checkbox"/>	Library	0	By Size	-	

Add Facet

Add a Local Facet

- Three ways to test:
 - With known records
 - With dummy records
 - With Indication Rules
- If a local field is not displaying correctly, and the problem is not with the data, report to CARLI

	icmpt
#s Total number of performers	Total number of performers needed to perform in the musical work/expression. <pre>382 0 1 soprano #n 2 #a mezzo-soprano #n 1 #a tenor saxophone #n 1 #d bass clarinet #n 1 #a trumpet #n 1 #a piano #n 1 #a violin #n 1 #d viola #n 1 #a double bass #n 1 #s 8 #2 lcmpt</pre> <p><i>[A work for 2 sopranos, one mezzo-soprano, tenor saxophone (doubling bass clarinet), C trumpet, piano, violin (doubling viola), and double bass--8 total performers]</i></p> <pre>382 0 1 trumpet #n 2 #a trombone #n 2 #s 4 #2 lcmpt</pre> <p><i>[A work for two trumpets and two trombones--4 total performers]</i></p>
#t Total number of ensembles	The total number of ensembles needed to perform in the musical work/expression. <pre>382 0 1 #b soprano voice #n 1 #b alto voice #n 1 #b tenor voice #n 1 #b bass voice #n 1 #a mixed chorus #e 1 #a orchestra #e 1 #r 4 #t 2 #2 lcmpt</pre> <pre>382 0 1 orchestra #e 1 #t 1 #2 lcmpt</pre>
#v Note	Note for information that is not kept otherwise in the subfields of

Live Demonstration:

How to configure consortial Local Fields for Full Record display, Advanced Search, and Facets

Ex Libris Documentation:

How to [Add a Field to a Display Line](#) in the **Brief Record** – This procedure allows you to add the local field to a display line in the record's brief record section.

How to [Configure the Details Service](#) to add the field to the **Full Record** – This procedure allows you to display the local field in the Details section on the full record display page.

How to [Add a Search Index](#) – This procedure allows you to add the local **search field on the Advanced Search** page. "Enable field for search" must be checked first in the field definition.

How to [Add a Local Facet](#) – This procedure allows you to add the local **facet on the Brief Results** page. "Enable field for facet" must be checked first in the field definition.

