Enriched Primo Browse from Aleph at CUNY

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Enriched Primo Browse from Aleph @ CUNY

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28 October 2015
Basic Primo Browse

- **All** records harvested from ANY ILS can include existing authors, titles, subjects, and call numbers
- Primo default setup uses these fields to provide
  - Browse local library records in a dedicated interface
    - Author
    - Title
    - Subject
    - Call number
  - Virtual Shelf tab for search results with a call number
Basic Aleph Configuration

All found in ./[bib_library]/tab/

• tab_publish

<table>
<thead>
<tr>
<th>!</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>!!!!!!!!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!!!-!-!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!!</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PRIMOFULL ALLALEPH N FULLP MARCXML

• tab_fix

<table>
<thead>
<tr>
<th>!</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!&gt;</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
FULLP fix_doc_sort

• tab_expand

<table>
<thead>
<tr>
<th>!</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
FULLP expand_doc_bib_avail RESHELVING=Y;AVA=MI;THRESHOLD=2
Enriched Primo Browse

- Enriched Browse requires additional ILS data to add
  - Cross-references
    - Non-preferred authors and subjects with link to preferred
  - Subject authority source
    - Allows authority source-specific handling
  - Call number type
    - Separate call number browse for each type
- View real-time Aleph record enrichment on Aleph server via
  - UTIL-F-4 > doc_expand > FULLP > record #
    (where FULLP = Primo publish routine name)
Cross-Reference (see...)

• Enrichment adds
  – non-preferred subject/author fields
  – if subject/author is preferred or not ($PY/N)
  – preferred record ID
    • links preferred to non-preferred ($0, zero)
• Currently no enrichment for authority 5xx fields (see also references)
Cross-Reference MARC XML

<datafield tag="100" ind1="1" ind2=""">
  <subfield code="a">Miller, Rodney, </subfield>
  <subfield code="c">violinist</subfield>
  <subfield code="0">ABC10001234567</subfield>
  <subfield code="P">Y</subfield>
</datafield>

<datafield tag="100" ind1="1" ind2=""">
  <subfield code="a">Miller, Roddy, </subfield>
  <subfield code="c">violinist</subfield>
  <subfield code="0">ABC10001234567</subfield>
  <subfield code="P">N</subfield>
</datafield>
Aleph Cross-Reference Setup

• In tab_expand, add cross-reference information
  FULLP expand_doc_bib_accref ADDITIONAL-INFO

• If multiple authority schemes included, use
  FULLP expand_doc_bib_accref ADDITIONAL-INFO=M
    – Aleph v 21.1.5+

• Note: do not confuse `expand_doc_bib_accref` with
  `expand_doc_bib_accref_1`
    – “_1” version is not used with Primo publishing
Author Cross: MARC > PNX

From MARC
1001 $aShakespeare, William,$d1564-1616.
$0CUN10000890256$PY
1001 $aShakespeare, Guglielmo$d1564-1616.
$0CUN10000890256$PN

To PNX
<browse>
  <author>$DShakespeare, William, 1564-1616
  $EShakespeare, William, 1564-1616
  $ICUN10000890256$PY</author>
  <author>$DShakespeare, Guglielmo, 1564-1616
  $EShakespeare, Guglielmo, 1564-1616
  $ICUN10000890256$PN</author>
</browse>
Subject Cross: MARC > PNX

From MARC
10010$aArab-Israeli conflict.$0CUN10000225681$20$PY
10010$aIsrael-Arab conflict.$0CUN10000225681$20$PN

To PNX
<browse>
   <subject>$DArab-Israeli conflict$EArab-Israeli conflict $TLCSH$ICUN10000225681$PY</subject>
   <subject>$DIIsrael-Arab conflict$EIIsrael-Arab conflict $TLCSH$ICUN10000225681$PN</subject>
</browse>
PNX Subfields Used by Browse

Subject and Title

$D = \text{heading formatted for display}$

$E = \text{unique, normalized heading version for match and sort}$

$P = \text{preferred} = Y, \text{default} / \text{non-preferred} = N;$
not used for title

$I = \text{preferred authority ID for link to non-preferred; not used for title}$

$T = \text{authority type; subject only}$
Subject Source Code

• To display subject authority source in Primo, source must be included subfield

• Standard MARC, LC and MESH places subject source in MARC 2\textsuperscript{nd} indicator, complicating Primo normalization
  – All subjects with 2\textsuperscript{nd} indicator = 7 automatically have source in $2$ (required parameter)

• This expand adds 2\textsuperscript{nd} indicator subject source codes to $2$
<datafield tag="650" ind1=""" ind2="0">  
  <subfield code="a">Folk dance music</subfield>  
  <subfield code="z">New England.</subfield>  
  <subfield code="0">ABC009876543</subfield>  
  <subfield code="P">Y</subfield>  
  <subfield code="2">0</subfield>  
</datafield>
Aleph Subject Source Setup

• In tab_expand, add `expand_doc_bib_subtype`

• 3\textsuperscript{rd} parameter lists included subject fields
  
  FULLP \ expand_doc_bib_subtype \ 6###0,6###1,6###2

• 2\textsuperscript{nd} indicator authority source codes
  
  – 0 Library of Congress Subject Headings
  – 1 LC subject headings for children's literature
  – 2 Medical Subject Headings
  – 3 National Agricultural Library subject authority file
  – 4 Source not specified (not used)
  – 5 Canadian Subject Heading
  – 6 Repertoire des vedettes-matiere
Subject: MARC > PNX

From MARC
10010$aArab-Israeli conflict.$0CUN10000225681$20$PY
10017$aArab-Israeli conflict.$0CUN10000225682$2FAST$PY

To PNX
<browse>
   <subject>$DArab-Israeli conflict$EArab-Israeli conflict
   $TLCSH$ICUN10000225681$PY</subject>
   <subject>$DArab-Israeli conflict$EArab-Israeli conflict
   $TFAST$ICUN10000225681$PY</subject>
</browse>
Call Number Type

- Call number type based on MARC Holdings 852 indicators
- AVA field always added to harvested records
  - transfers availability information from Aleph to Primo
- Allows separate browse groups based on call number type
- AVA field includes
  - call number in $d$
  - call number type in $k$
Call Number Type MARC XML

<datafield tag="AVA" ind1="" ind2="">
  <subfield code="a">ABC50</subfield>
  <subfield code="b">NAND</subfield>
  <subfield code="c">Childrens Lit</subfield>
  <subfield code="d">GT4905 .B7 1967</subfield>
  <subfield code="e">available</subfield>
  <subfield code="f">1</subfield>
  <subfield code="g">0</subfield>
  <subfield code="h">N</subfield>
  <subfield code="i">0</subfield>
  <subfield code="j">CLT</subfield>
  <subfield code="k">0</subfield>
</datafield>
Aleph Call Number Type Setup

• `expand_doc_bib_avail` standard in `tab_expand`
• MARC Location/Call Number codes
  – 0 Library of Congress (LC) classification
  – 1 Dewey Decimal classification
  – 2 National Library of Medicine (NLM) classification
  – 3 Superintendent of Documents (SUDOC) classification
  – Not currently supported
    • # (empty) No information provided
    • 4 Shelving control number
    • 5 Title
    • 6 Shelved separately
    • 7 Source specified in subfield $2
    • 8 Other scheme
Call Number: MARC > PNX

From MARC
AVA $aCUN50$bSI001$c3rd Floor$dDS119.7 .H424 2005$eavailable$tAvailable$f1$g0$hN$i0$jSTACK$k0

To PNX
<browse>
   <callnumber>$ISI$DDS119.7 .H424 2005$E0ds 0011970000.h 42400 2005$T0</callnumber>
</browse>
PNX Subfields Used by Browse

Call Number

$D = \text{call number formatted for display}$

$E = \text{unique, normalized call number version for match and sort}$

$T = \text{call number type}$

• each has separate browse list with specialized normalization procedure

• unsupported types or records without type are added to generic list
Information Sources

• Primo Technical Guide > Browse Functionality > Configuring the Normalization Rules > Additional Data Needed from the ILS
• Aleph v21 Service Pack documentation
  – rep_change 2112, expand_doc_bib_accref and expand_doc_bib_avail
  – rep_change 2526, expand_doc_bib_accref > ADDITIONAL-INFO=M
• Primo Release Notes documentation (v4.3 Item #18541)
• Primo Technical Guide > Browse Functionality
• Primo v4.x Highlights > Support Browse in Normalization Rules (V4.1-4.8) > Aleph MARC Template
• How to Configure Aleph-Primo Interoperability > Publishing Mechanism > Expand Routines
Thank You

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