



# Primo VE Configuration

CARLI

Thursday, November 14, 2019

Presented by Russell Thompson, Sr. Implementation Consultant



- Tour of Primo VE
- EBSCO API
- Configuration Options
- Primo VE Resources
- Next Steps
- Questions



# Tour of Primo VE

**Important note: The display screens used in this presentation are standard Primo VE screens - although they may lack the specific logo, branding, or display elements of any specific CARLI institution.**

# Basic Search

The screenshot shows the ExLibris Basic Search page. At the top left is the ExLibris logo. A navigation bar contains links for LIBRARY SEARCH, JOURNAL SEARCH, BROWSE, DATABASE SEARCH, NEWSPAPERS, and TAGS, followed by a menu icon. On the right of the navigation bar are icons for a refresh button, a pin icon, and a 'Sign in' link. Below the navigation bar is a search bar with the placeholder text 'Search anything' and a magnifying glass icon. To the right of the search bar is a link for 'ADVANCED SEARCH'. The main content area is divided into two columns. The left column has a heading 'How does this work?' followed by a paragraph: 'Primo provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more.' Below this is another paragraph: 'Primo also helps you manage your research. Sign-in in order to:' followed by a bulleted list: '• Renew books and videos', '• Create favorites lists', '• Export citations to Refworks and Endnote Web', and '• View full search results. (Some databases, only show results when you're signed in.)'. The right column has a heading 'Where can I get help?' followed by a link 'Ask a librarian how to start your search'. Below that is another heading 'Questions? Comments?' followed by a link 'Let us know what you think!'.

Basic Search page searches the default scope: for example, the local library catalog.

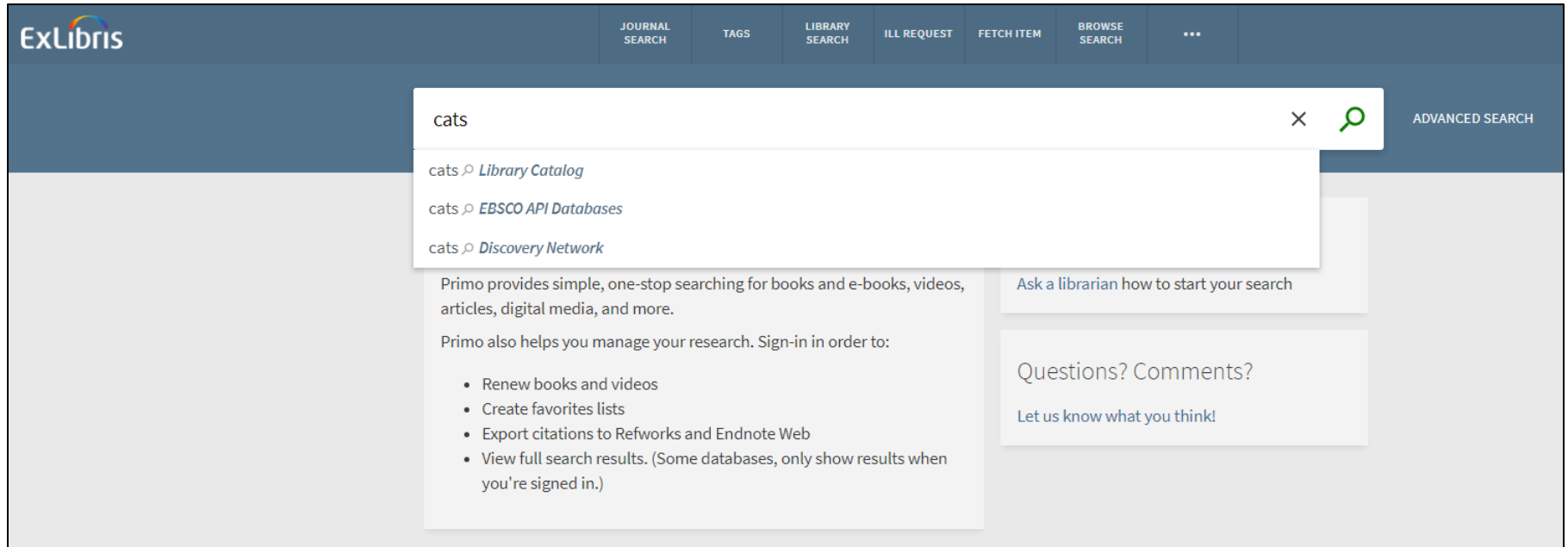
# Primo VE Discovery Search Scopes

The Primo VE Discovery UI (User Interface) is also called a FE (Front End) or "View". So it may formally be known as a Primo VE Discovery FE UI View, which is accessed via a URL which you link to in your web browser.

This UI "View" has been set up with various "Search Profile Slots", which are essentially sets of records accessible to Primo VE via defined "Scope values". The search profiles which have been set up in the Primo VE Discovery FE UI View initially may be:

- **Library Catalog:** includes all Alma IZ institutional catalog records only
- **Discovery Network:** Network Zone searching [NZ physical items, IZ electronic and IZ digital]
- **EBSCO API Databases** (may be turned off)
- **WorldCat API** (may be turned off)
- **Course Reserves:** – includes only Alma catalog records populated with Alma Course Reserve data fields (may be turned off)

# Basic Search - Search Scope Slots



The screenshot shows the ExLibris search interface. At the top, there is a navigation bar with the ExLibris logo and several menu items: JOURNAL SEARCH, TAGS, LIBRARY SEARCH, ILL REQUEST, FETCH ITEM, BROWSE SEARCH, and a three-dot menu. Below this is a search bar containing the text "cats". To the right of the search bar is a magnifying glass icon and a close button (X). Below the search bar, a dropdown menu is open, displaying three search scope options: "cats ▾ Library Catalog", "cats ▾ EBSCO API Databases", and "cats ▾ Discovery Network". To the right of the search bar, there is a link for "ADVANCED SEARCH". Below the search bar, there is a section of text explaining Primo's search capabilities and a list of features available to signed-in users. To the right of this text, there are two buttons: "Ask a librarian how to start your search" and "Questions? Comments?". Below the "Questions? Comments?" button, there is a link that says "Let us know what you think!".

ExLibris

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

cats × 🔍 ADVANCED SEARCH

cats ▾ *Library Catalog*

cats ▾ *EBSCO API Databases*

cats ▾ *Discovery Network*

Primo provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more.

Primo also helps you manage your research. Sign-in in order to:

- Renew books and videos
- Create favorites lists
- Export citations to Refworks and Endnote Web
- View full search results. (Some databases, only show results when you're signed in.)

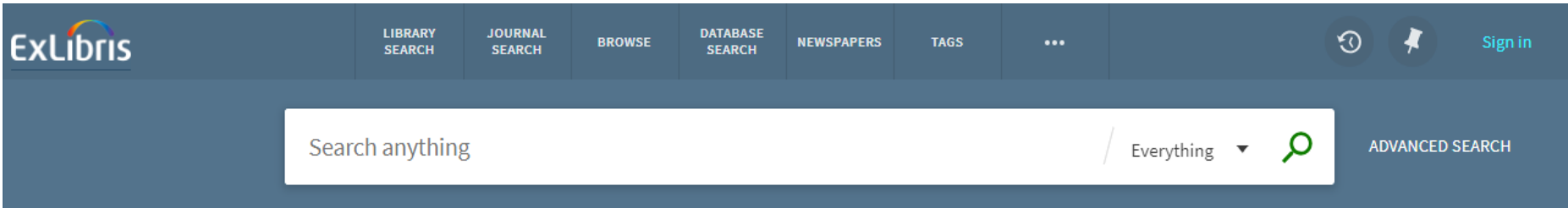
Ask a librarian how to start your search

Questions? Comments?

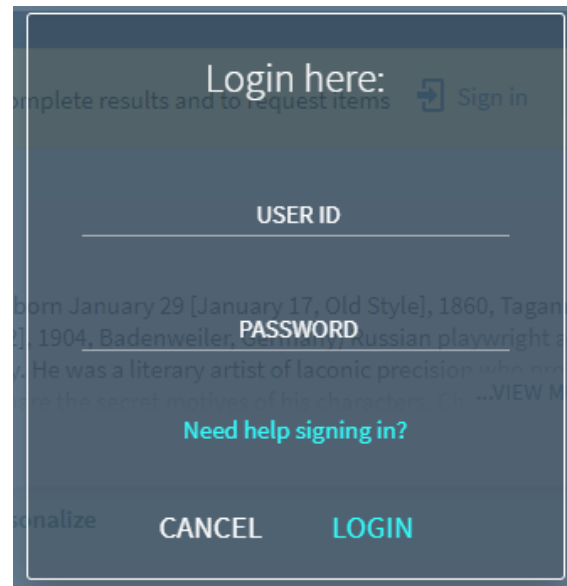
Let us know what you think!

Start typing to expose other search scope options such as Discovery Network.

# User Login



Alma internal users may log in now. When external authentication is added for Alma, it will also be added for Primo VE. Users can log in to save citations and see My Library Card features (Loans, Requests, Fines, Blocks). In addition, you must be on campus or logged in to see EBSCO search results.





## Primo VE Search Results



# Primo VE Search Results – sample search

The screenshot displays the ExLibris Primo VE search interface. At the top, the navigation bar includes the ExLibris logo and menu items: LIBRARY SEARCH, JOURNAL SEARCH, TAGS, ILL REQUEST, FETCH ITEM, and BROWSE SEARCH. A search bar contains the query 'rain' with a search scope dropdown set to 'Everything'. A yellow banner below the search bar prompts the user to 'Sign in to get complete results and to request items'. The main results area shows 'PAGE 1 34,981 Results' and a 'Personalize' toggle. Two search results are visible: a book 'Acid rain' by Eileen Lucas (1991) and an article 'Rain' by J. Peterson. A sidebar on the right titled 'Tweak your results' offers options like 'Expand My Results', 'Sort by' (set to Relevance), 'Availability' (with facets for online, peer-reviewed, open access, and library-held), 'Subject', and 'Author/Creator'. A 'Page Counter' shows 'PAGE 1' with a dropdown arrow. Callout boxes identify 'Main Menu options', 'Search Scope', 'Results', 'Sort', 'Facets', and 'Actions (Send To) options for each record'.

Search Scope

Main Menu options

Results

Page Counter

Sort

Facets

Actions (Send To) options for each record



# Results Page

# Results Page

The screenshot shows the ExLibris search results page for the query "cats". The page header includes the ExLibris logo and navigation links for JOURNAL SEARCH, TAGS, LIBRARY SEARCH, ILL REQUEST, FETCH ITEM, BROWSE SEARCH, and a menu. The search bar contains "cats" and is set to "Library Catalog". A yellow banner prompts the user to "Sign in to get complete results and to request items". The main content area displays "PAGE 1 495 Results" and lists four book results:

- 1. **Cats** by Hawksley, Gerald.; Hawksley, Julie. c1989. Available at Aiken Technical College Library ATC Juvenile (PZ10.3.H3 .C3 1989)
- 2. **Scientific and humane issues in the use of random source dogs and cats in research** by Institute for Laboratory Animal Research (U.S.), Committee on Scientific and Humane Issues in the Use of Random Source Dogs and Cats in Research.; National Research Council (U.S.). Institute for Laboratory Animal Research Council. c2009. Available Online
- 3. **Exotic cats** by Stone, Lynn. 2013. Available Online
- 4. **101 amazing facts about cats** by Goldstein, Jack. 2013. Available Online

On the right side, there is a "Tweak your results" section with various filters: Sort by (Relevance), Availability (Available online, Held by library), Subject, Author/Creator, Library, Other Libraries, Institution, Location, Resource Type, Creation Date, and Language.

A "PAGE 1" indicator is visible in the bottom left corner of the results area.

Result page opens up the scope options. Facets are displayed on the right by default, and can be moved to the left.

# Results Page – Scopes

The screenshot shows the ExLibris search interface. At the top, the search bar contains the term "cats". A dropdown menu is open, listing three search scopes: "Library Catalog" (selected), "EBSCO API Databases", and "Discovery Network". The main results area displays four book entries:

- 1. **Cats** by Hawksley, Gerald.; Hawksley, Julie. c1989. Available at Aiken Technical College Library ATC Juvenile (PZ10.3.H3 .C3 1989)
- 2. **Scientific and humane issues in the use of random source dogs and cats in research**. Institute for Laboratory Animal Research (U.S.). Committee on Scientific and Humane Issues in the Use of Random Source Dogs and Cats in Research.; National Research Council (U.S.). Institute for Laboratory Animal Research Council. c2009. Available Online
- 3. **Exotic cats** by Stone, Lynn. 2013. Available Online
- 4. **101 amazing facts about cats** by Goldstein, Jack. 2013. Available Online

On the right side, there is a "Tweak your results" panel with filters for Sort by (Relevance), Availability (Available online, Held by library), Subject, Author/Creator, Library, Other Libraries, Institution, Location, Resource Type, Creation Date, and Language.

Choose a new scope from the dropdown.

# Results Page – Sort and Facets

ExLibris LIBRARY SEARCH JOURNAL SEARCH TAGS ILL REQUEST FETCH ITEM BROWSE SEARCH

rain X Everything ADVANCED SEARCH

Sign in to get complete results and to request items Sign in DISMISS

PAGE 1 34,981 Results Personalize

Tweak your results

Expand My Results

**Sort by** Relevance

**Availability**

- Available online
- Peer-reviewed Journals
- Open Access
- Held by library

**Subject**

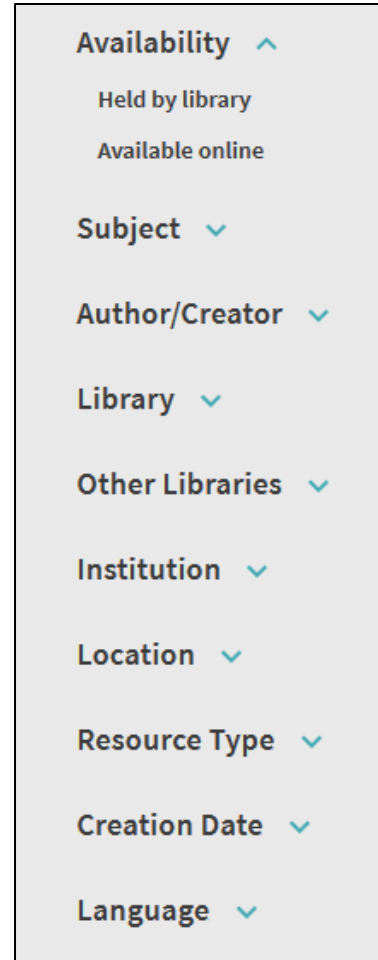
1 **Acid rain**  
Lucas, Eileen.  
1991  
Available at Main Library Juvenile Education Collection (TD195.44 .L83 1991)

2 **Rain**  
J. Peterson  
Interdisciplinary Studies in Literature and Environment, 2002, Vol.9(2), pp.255-255  
PEER REVIEWED  
Available Online

PAGE 1

# Results Page – Facets

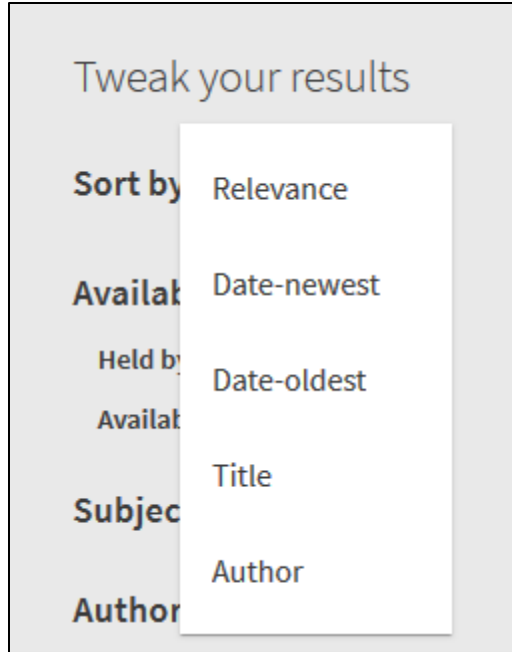
- Availability
  - Held by library, Available online
- Subject
- Author/Creator
- Library (Alma only)
- Other Libraries (Alma only)
- Institution
- Location
- Resource Type
- Creation Date
- Language



A screenshot of a search results page facet menu. The menu is a vertical list of facets, each with a label and a chevron icon. The facets are: Availability (with an upward chevron), Subject (with a downward chevron), Author/Creator (with a downward chevron), Library (with a downward chevron), Other Libraries (with a downward chevron), Institution (with a downward chevron), Location (with a downward chevron), Resource Type (with a downward chevron), Creation Date (with a downward chevron), and Language (with a downward chevron). The 'Availability' facet is expanded, showing two sub-items: 'Held by library' and 'Available online'.

- Availability ^
- Held by library
- Available online
- Subject v
- Author/Creator v
- Library v
- Other Libraries v
- Institution v
- Location v
- Resource Type v
- Creation Date v
- Language v

# Expand Results and Sort



## Sort by

- Relevance
  - Based on Primo VE ranking algorithm
- Date-newest
- Date-oldest
- Title
- Author

# Brief Result - Actions (Send To) options

Click the ellipsis to expand the single result for Send To options. Or use the pin icon to tag the item as a favorite. Sign in to save for future sessions.

3  BOOK   

**Acid rain and transported air pollutants : implications for public policy**  
United States. Congress. Office of Technology Assessment.  
1985

 Available at Main Library Stacks (TD196.A25 A2823 1985) >

3  BOOK    

**Acid rain and transported air pollutants : implications for public policy**  
United States. Congress. Office of Technology Assessment.  
1985

 Available at Main Library Stacks (TD196.A25 A2823 1985) >

 EXPORT BIBTEX  EXPORT RIS  EASYBIB  ENDNOTE  REFWORKS  PRINT  CITATION  PERMALINK  EMAIL



# Detailed Result - Physical Resources

For Physical Resources (print) items from Alma, there are six sections: the brief citation, Send To, Get It, Details, Virtual Browse, and Links. The Get It section is pulling directly from Alma, and borrowing options are included when the user is signed in to Primo VE.

The screenshot displays a Primo VE record for a physical resource. On the left is a vertical navigation menu with the following items: TOP, SEND TO, GET IT, DETAILS, TAGS, VIRTUAL BROWSE, and LINKS. The main content area shows a book cover for 'ACID RAIN' and a brief citation: 'Acid rain and transported air pollutants : implications for public policy', United States. Congress. Office of Technology Assessment, 1985. Below the citation, it states 'Available at Main Library Stacks (TD196.A25 A2823 1985)'. The 'Send to' section contains icons for EXPORT BIBTEX, EXPORT RIS, EASYBIB, ENDNOTE, REFWORKS, PRINT, CITATION, PERMALINK, and EMAIL. The 'Get It' section features a yellow banner with the text 'Please sign in to check if there are any request options.' and a 'Sign in' button. The 'LOCATION ITEMS' section lists 'Main Library' as 'Available', with 'Stacks TD196.A25 A2823 1985' and '(1 copy, 1 available, 0 requests)'. A dropdown menu is open, showing 'Item in place' and 'Loanable' options.

# Detailed Result - Electronic

For Electronic items, there are five sections: the brief citation, Send To, View Online, Details, and Links. The View Online section is using the Alma Link Resolver to link to the full text.



The screenshot shows a library catalog record for a book. On the left is a vertical sidebar with navigation links: TOP, SEND TO, VIEW ONLINE, DETAILS, TAGS, and LINKS. The main content area features a book cover image, the title "Disaster recovery for archives, libraries and records management systems in Australia and New Zealand" by Judith Doig (1997), and an "Available Online" link. Below this is a "Send to" section with icons for exporting to BibTeX, RIS, EasyBib, Endnote, Refworks, printing, and citation. A "View Online" section is also present, showing a link to the full text available on Elsevier ScienceDirect.

**BOOK**  
**Disaster recovery for archives, libraries and records management systems in Australia and New Zealand**  
Doig, Judith.  
1997  
[Available Online >](#)

**SEND TO**

Send to

**VIEW ONLINE**

EXPORT BIBTEX EXPORT RIS EASYBIB ENDNOTE REFWORKS PRINT CITATION PER >

**LINKS**

View Online

**Full text availability**

Elsevier ScienceDirect eBook - Information Management pre-2008

# Detailed Result - Get It Section

Provides the following information for each print (P) resource:

- Locations where the title can be found
- Availability of the title
- Request options

The screenshot shows a library catalog record for the book "Acid rain and transported air pollutants : implications for public health in the United States." The "Get It" section is highlighted with a red box. A blue callout box points to the "Get It" section, stating: "Once signed in, user can place a request using options which will display after 'Request Options'".

**ACID RAIN**  
United States. Congress. Office of Technology Assessment.  
1985

Available at Main Library Stacks (TD196.A25 A2823 1985) >

TOP  
SEND TO  
**GET IT**  
DETAILS  
TAGS  
VIRTUAL BROWSE  
LINKS

Send to

EXPORT BIBTEX EXPORT RIS EASYBIB ENDNOTE REFWORKS PRINT CITATION PERMALINK EMAIL

Get It

Please sign in to check if there are any request options. Sign in

LOCATION ITEMS

Main Library  
Available, Stacks TD196.A25 A2823 1985  
(1 copy, 1 available, 0 requests)

Item in place  
Loanable

# Detailed Result - View Online Section

- Provides access to electronic (E) and digital (D) material
- Resources are listed for the user to select

The “View Online” section takes the user to the Alma Link Resolver resources which can deliver the full text

**BOOK**  
**Disaster recovery for archives, libraries and records management systems in Australia and New Zealand**  
Doig, Judith.  
1997  
[Available Online >](#)

TOP  
SEND TO  
**VIEW ONLINE**  
DETAILS  
TAGS  
LINKS

Send to

EXPORT BIBTEX EXPORT RIS EASYBIB EASYPDF REWORKS PRINT CITATION PER >

View Online

Full text availability

Elsevier ScienceDirect eBook - Information Management pre-2008

# Detailed Result - Virtual Browse Section

TOP

SEND TO

GET IT

DETAILS

**VIRTUAL BROWSE**

LINKS



BOOK

**Acid rain and transported air pollutants : implications for public policy**

United States. Congress. Office of Technology Assessment.

1985

Available at Main Library Stacks (TD196.A25 A2823 1985) >



Virtual Browse is a book cover display of the bookshelf for Alma records, similar to the BROWSE function for call number browse.

Virtual Browse

< What price? Mining in China, Burma ... 2007

Environmental Impacts of Wind-Energy Projects 2007

Acid rain 1991

Acid rain and transported air pollutants : implications for public ... 1985

Mercury from gold and silver mining : a chemical time bomb? ... 1998

Handbook of environmental data on organic chemicals 2008 >

# Advanced Search

The screenshot shows the ExLibris Advanced Search interface. At the top, there is a navigation bar with the ExLibris logo and several menu items: LIBRARY SEARCH, JOURNAL SEARCH, TAGS, ILL REQUEST, FETCH ITEM, and BROWSE SEARCH. On the right side of the navigation bar, there are icons for a refresh button, a pin, and a 'Sign in' link, along with a 'Menu' dropdown arrow.

The main search area features a 'Search for:' section with three radio buttons: 'Library Catalog' (selected), 'Everything', and 'Articles'. A blue callout bubble points to these buttons with the text: 'Search Scope may be changed using the radio buttons'. Below this, there are two search criteria rows. The first row has 'Any field' and 'contains' dropdown menus. The second row has 'AND' and 'Any field' and 'contains' dropdown menus. A red box highlights the 'Any field' dropdown menu, which is open and shows a list of search fields: 'Any field', 'Title', 'Author/Creator', 'Subject', and 'ISBN'. Another red box highlights the search scope options on the right side of the interface, which are: 'Everything', 'Library Catalog', 'Articles', and 'Course Reserves'. A red arrow points from the 'Library Catalog' radio button to this list.

# Main Menu – Journal Search

Journal Search

water soil

x



Sign in to get complete results and to

5 Results

1



JOURNAL

**Journal of soil and water conservation (Online)**

Soil Conservation Society of America.

1946

[Available Online >](#)

2



JOURNAL

**Soil Sediment & Water**

[Available Online >](#)

If an electronic journal also has physical holdings, then you can click “Available at” to get a list of physical print locations.

Clicking the “Available Online” takes you to the Alma Link Resolver resources which can deliver the full text for this journal record.

# Main Menu – Fetch Item (Citation Linker)

ExLibris

LIBRARY SEARCH JOURNAL SEARCH BROWSE DATABASE SEARCH NEWSPAPERS TAGS ...

## Fetch item (Citation Linker)

Find a specific journal article, journal or book by citation information.  
For best results, include a title, ISSN, ISBN, DOI or PMID.

Article  Book  Journal

Article Title \_\_\_\_\_ Journal Title \_\_\_\_\_

Year \_\_\_\_\_ Month ▼ Day ▼

Volume \_\_\_\_\_ Issue \_\_\_\_\_

Start Page \_\_\_\_\_ End Page \_\_\_\_\_

ISSN \_\_\_\_\_ DOI \_\_\_\_\_ PMID \_\_\_\_\_

Author Last Name \_\_\_\_\_ Author First Name \_\_\_\_\_ Author Initials \_\_\_\_\_

Publisher \_\_\_\_\_ Publication Date \_\_\_\_\_

↻ RESET

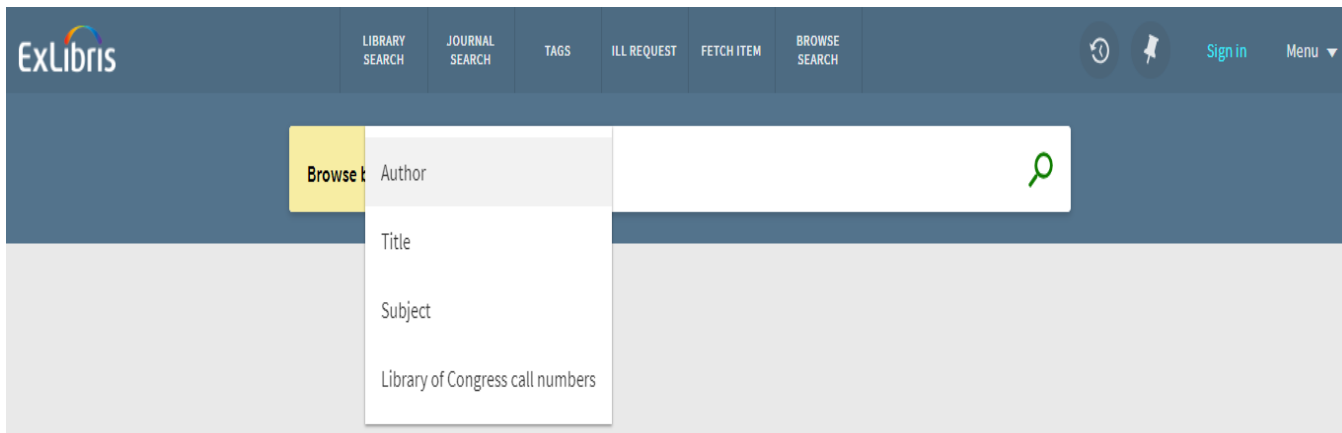
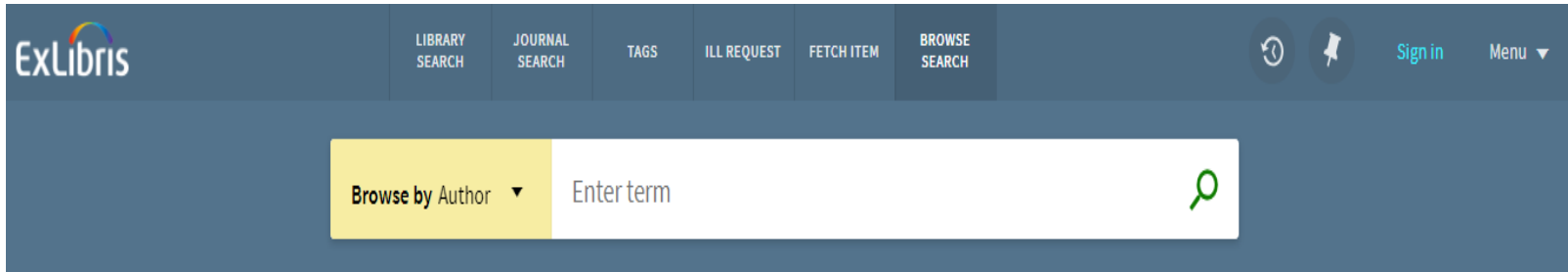
➤ SUBMIT

- A user can enter an exact citation, check to find if you have access, and link to it through the Alma link resolver.
- Citation Linker may be renamed or removed.



# Browse Search

Important note! : Browse searching (author, title, subject, call number) only applies for Alma data.

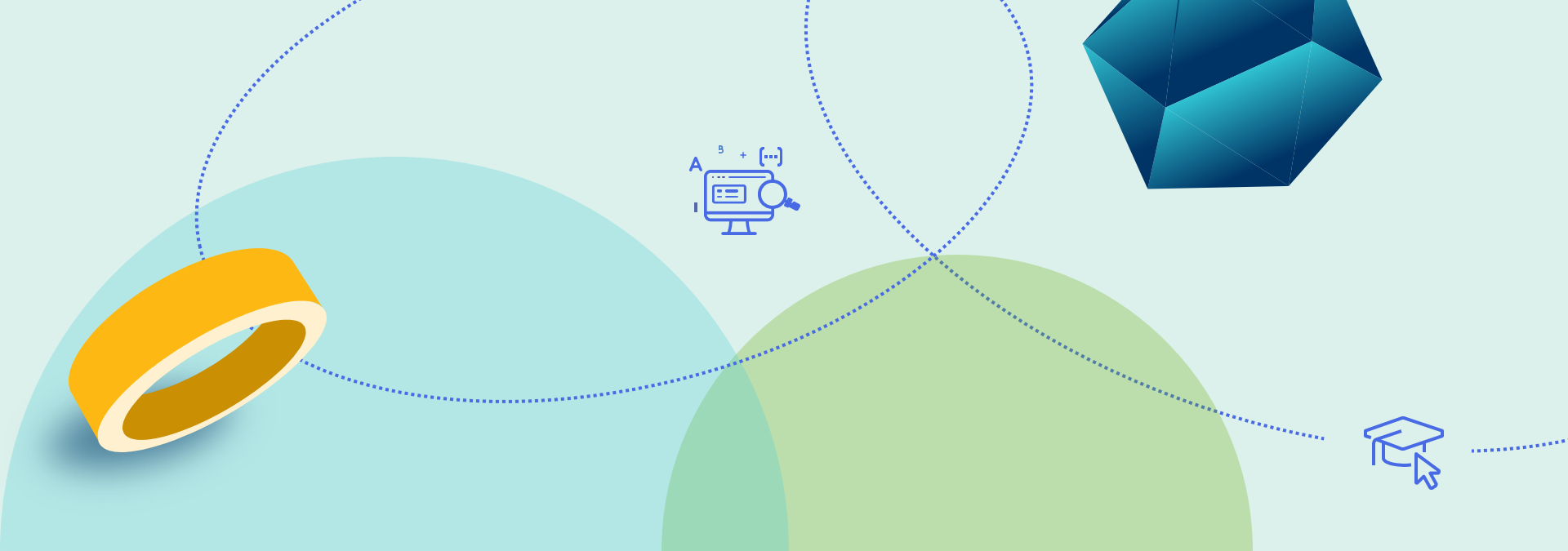


# Browse Search - Result

Browse by Subject ▼	rain	
Railroads West (U.S.) History.	1 record	
Rain and rainfall.	1 record	
Rain and rainfall Fiction.	1 record	

Browse by Author ▼	bradford	
Bradenbaugh, Jerry	1 record	
Bradford, Curtis Baker, 1911-1969.	1 record	
Bradford, Ed	1 record	



# EBSCO API Databases

# EBSCO API

- The EBSCO API Plugin has been configured for some institutions
- The EBSCO API is implemented as a separate scope
- After testing, some libraries choose to turn off this feature
- Only authenticated users (on campus or logged in) can search the EBSCO scope (when available)

The screenshot displays the ExLibris search interface. At the top, the ExLibris logo is on the left, and navigation links for 'MY LIBRARY CARD', 'ENGLISH', and 'SIGN OUT' are on the right. The search bar contains the text 'science fiction' and is set to the 'EBSCO API Databases' scope. Below the search bar, the results page shows 'PAGE 1 1,690,404 Results' and a 'Save query' button. The main results area lists three items:

1. REFERENCE ENTRY: **Science Fiction**, 2016, p.1-2. Full text available.
2. ARTICLE: **Science Fiction—An Inspiration for Creativity.** Roman, Harry T. ; Tech Directions, 2017, Vol.76 (8), p.24-28. Full text available.
3. ARTICLE: **Where No One Has Gone Before: When Science Fiction Inspires Technology.** Weber, Richard M. ; Journal of Financial Service Professionals, 2016, Vol.70 (4), p.43-47.

On the right side, there is a 'Tweak my results' panel with filters for 'Sort by' (set to Relevance), 'Subject' (listing SCIENCE fiction, IMPLICIT religion, RELIGION & literature, ANTHROPOLOGY, BUDDHISM in literature, and a 'Show More' link), and 'Journal Title' (listing Dissertation Abstracts In...). A 'PAGE 1' indicator is visible in the bottom left corner.

# EBSCO API – Keep in Mind

- The metadata we receive from EBSCO through the API is limited and cannot be enriched on our end.
- EBSCO results cannot be de-duplicated.
- Sorting is not available for EBSCO results
- The default setup for the EBSCO API uses a separate search scope rather than blending the results with other resources because:
  - Due to the way EBSCO data is supplied, a blended search scope that includes EBSCO API data would suppress all facet counts from the display.

# EBSCO API – Configuration

- The EBSCO API search is a live search, using EBSCO's search functionality.
- Some or all of your EBSCO databases may be included. Which EBSCO DBIDs are searched is tracked in the Primo VE Discovery Configuration Search Profiles.
- If an EBSCO resource database is cancelled, it should also be removed from Primo VE Discovery Configuration. One DBID that is not subscribed to will cause all EBSCO results to fail, not just that database.



# Discovery Configuration Options

# Page Structure – Primo VE Discovery Home Page

The screenshot shows the Primo VE Discovery Home Page interface. At the top, there is a navigation bar with the ExLibris logo on the left, and links for JOURNAL SEARCH, TAGS, LIBRARY SEARCH, ILL REQUEST, and a menu icon. On the right of the navigation bar, there are icons for a refresh button, a pin, and a user profile labeled 'Guest ENGLISH'. Below the navigation bar is a search bar with the placeholder text 'Search anything' and a magnifying glass icon, followed by a link to 'ADVANCED SEARCH'. The main content area features two large layout cards. The first card, titled 'How does this work?', contains text about Primo's services and a list of features. The second card, titled 'Where can I get help?', includes a link to 'Ask a librarian'. Below this is another card titled 'Questions? Comments?' with a link to 'Let us know what you think'. A dark blue callout box at the bottom right of the screenshot contains the text: 'The layout cards on the homepage are managed by a single html page'.

ExLibris Logo

JOURNAL SEARCH TAGS LIBRARY SEARCH ILL REQUEST ...

Guest ENGLISH

Search anything ADVANCED SEARCH

How does this work?

Primo provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more.

Primo also helps you manage your research. Sign-in in order to:

- Renew books and videos
- Create favorites lists
- Export citations to Refworks and Endnote Web
- View full search results. (Some databases, only show results when you're signed in.)

Where can I get help?

[Ask a librarian](#) how to start your search

Questions? Comments?

[Let us know what you think](#)

The layout cards on the homepage are managed by a single html page

Home Page structure – where the main entry screen has information present from the customized “library-logo.png” and “home\_en.html” files displaying on the entry screen.



# Page Structure – Primo VE Discovery Configuration Options

- The default Discovery Home page comes with some branding work applied
- CARLI institutions supplied logos which were added to the landing home page
- CARLI institutions will be able to –
  - Adjust Search Scopes names, order, contents
  - Edit results page facets and sections
  - Change landing page content, header links and link navigation
  - Change/update your logo as needed
  - Change colors of text, or pages via CSS or Primo VE Discovery configuration settings
  - Maintain CSS and HTML files: By using the UI customization Package Manager within Primo VE Discovery Configuration

# Primo VE – UI customization Package Manager utility

- An example display of the Alma/Primo VE Discovery View Configuration screen to download or load the “institution package” containing a full subdirectory schema with CSS and HTML files.

< View Configuration Back Save

01CARLI\_ADL:CARLLADL ▼

View Name CARLLADL

General Links Menu Search Profile Slots Advanced Search Configuration Brief Results Brief Record Display Full Record Services **Manage Customization Package**

Create Customization Package ▼

[Go to Primo Studio ↗](#)

Download Package ▼

Template View Customization Package

Current View Customization Package  No Package Loaded

Download Central Customization Package

Upload Package ▼

Customization Package

Upload Logo ▼

Upload Logo File

Logo Clickable URL  ⓘ

Inheritance ▼

Inherit from Central Package

# Basic Search – Configuration Options

Ex Libris implements a default search box, which may include some of the following search scopes:

- **Library Catalog:** includes all Alma IZ institutional catalog records only
- **Discovery Network:** Network Zone searching [NZ physical items, IZ electronic and IZ digital]
- **EBSCO API Databases** (may be turned off)
- **WorldCat API** (may be turned off)
- **Course Reserves:** – includes only Alma catalog records populated with Alma Course Reserve data fields (may be turned off)

CARLI institutions can make changes to their Discovery configuration:

- Add, reconfigure, re-label these scopes
- Modify the Send to options

# Advanced Search – Configuration Options

- Advanced Search includes:
  - Pre-filters (Material Type, Language, Start Date, and End Date)

Material Type  
All items ▼

---

Language  
Any language ▼

---

Start Date:  
Day ▼ Month ▼ Year


---

End Date:  
Day ▼ Month ▼ Year

Search for:  Everything  Library Catalog  Articles  Course Reserves

- Relevant course fields added to search bars in the Course Reserves search option (Course name, Instructor, ID and department) (**may be turned off if not used**)

Subject

Course Instructor 

Course ID

Course Name

Course Department Name

# Facets – Configuration Options

- CARLI institutions can make changes in their Discovery configurations:
  - Remove/reorder facets
  - Change facet headers (i.e. Author/Creator to Author, etc.)
  - Control the number of results to display in each facet (defaults to 0, with a collapsed menu)
  - Different search scopes can have different facets.

# Brief Results - Configuration Options

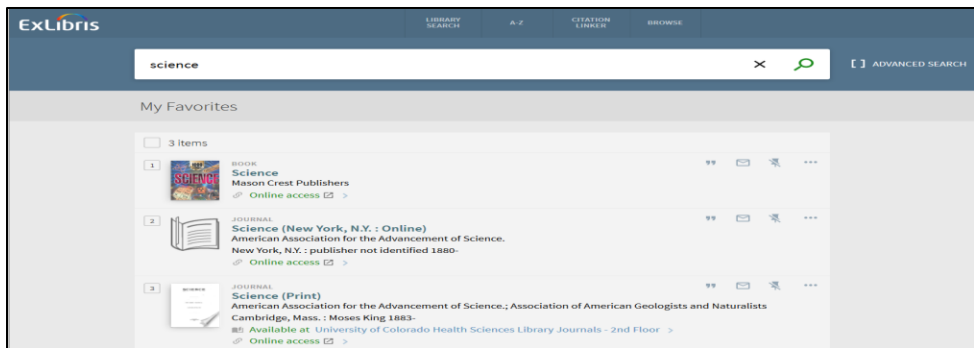
- CARLI institutions can make changes directly via the Primo VE Discovery Configuration:
  - Relabel sections
  - Modify the Send to options
  - Add or adjust fields for display in Details section

# Browse Search – Configuration Options

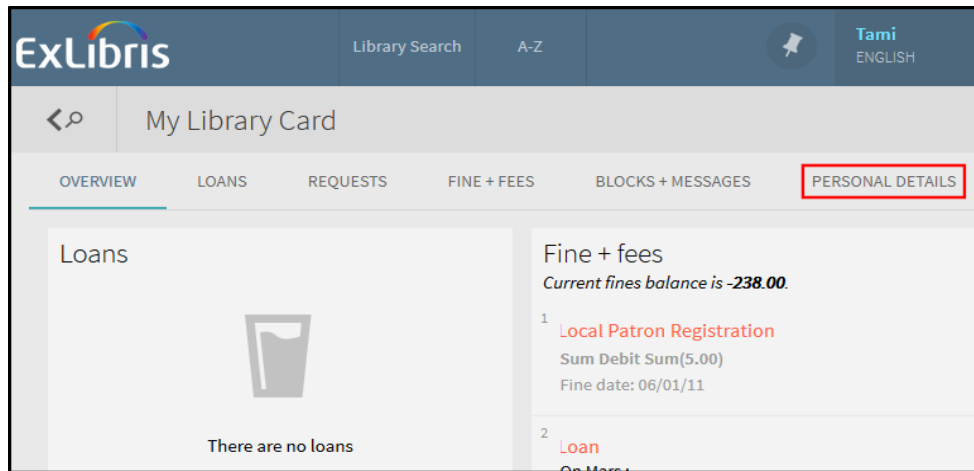
- Default configuration: Ex Libris implements browse for testing, which may include:
  - Implement default browse search
    - By Author
    - By Title
    - By Subject
    - By Library of Congress call numbers (where call number indicator is '0')
- Your options:
  - Determine if you want to disable browse search
  - Request other available call number browse lists turned on
    - By Dewey call numbers (where call number indicator is '1')
    - By SUDOC call numbers (where call number indicator is '3')
    - By call number (where call number indicator is <blank>, <missing> or '8')

# Favorites and My Library Card

## Favorites



## My Library Card







## Primo VE Discovery UI - Resources

# Primo VE Resources – Starting points

Documentation:

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE)

Training Videos:

[https://knowledge.exlibrisgroup.com/Primo/Training/Primo\\_VE\\_Training](https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training)

Release Notes:

[https://knowledge.exlibrisgroup.com/Primo/Release\\_Notes/002Primo\\_VE/0972019/002Primo\\_VE\\_2019\\_Release\\_Notes](https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE/0972019/002Primo_VE_2019_Release_Notes)

# Primo VE UI – Useful links for general information

"Getting Started with Primo VE"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/004Getting\\_Started\\_with\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/004Getting_Started_with_Primo_VE)

"Frequently Asked Questions for Primo VE"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/005FAQs](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/005FAQs)

"Alma Release Schedule – 2018-2019" – applies to Primo VE

[https://knowledge.exlibrisgroup.com/Alma/Release\\_Notes/010\\_2019/Alma\\_Release\\_Schedule\\_-\\_2019](https://knowledge.exlibrisgroup.com/Alma/Release_Notes/010_2019/Alma_Release_Schedule_-_2019)

"Primo VE Training" - online trainings

[https://knowledge.exlibrisgroup.com/Primo/Training/Primo\\_VE\\_Training](https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training)

"Primo VE Release Notes" (**check these with every release!**)

[https://knowledge.exlibrisgroup.com/Primo/Release\\_Notes/002Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE)

# Primo VE UI – Some useful specific resource links

"Configuring the User Interface" - **how to download or load a css/html package**  
[https://knowledge.exlibrisgroup.com/Primo/Training/Primo\\_VE\\_Training/Intro to Primo VE/Intro to Primo VE - English/Configuring the User Interface](https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training/Intro_to_Primo_VE/Intro_to_Primo_VE_-_English/Configuring_the_User_Interface)

"Primo VE Customization - Best Practices" - **getting started with css/html, logos, icons, images, and more**  
[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/008Primo\\_VE\\_User\\_Interface/010Primo\\_VE\\_Customization - Best Practices](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/008Primo_VE_User_Interface/010Primo_VE_Customization_-_Best_Practices)

"Primo Studio for Primo VE"  
[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/008Primo\\_VE\\_User\\_Interface/Primo Studio for Primo VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/008Primo_VE_User_Interface/Primo_Studio_for_Primo_VE)

"Mapping to the Display, Facets, and Search Sections in the Primo VE Record"  
[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/050Other\\_Configuration/Mapping to the Display%2C Facets%2C and Search Sections in the Primo VE Record](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/050Other_Configuration/Mapping_to_the_Display%2C_Facets%2C_and_Search_Sections_in_the_Primo_VE_Record)

# Primo VE UI - Additional Development Resources

**Some additional resources for development of your institution's CSS or HTML files via the UI customization Package Manager:**

Development Environment

<https://github.com/ExLibrisGroup/primo-explore-devenv>

Explore Package

<https://github.com/ExLibrisGroup/primo-explore-package>



## Next Steps

# Primo VE Home Page – **Next Steps**

- Check that Primo VE Discovery Front End UI URL access works
- Review institution and view settings
- Review Primo VE Trainings in the Knowledge Center
- If needed, review how to use a basic embedded search box code which you can locally modify or use

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/008Primo\\_VE\\_User\\_Interface/010Primo\\_VE\\_Customization\\_-\\_Best\\_Practices#Creating\\_a\\_Search\\_Box\\_With\\_Deep\\_Links\\_to\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/008Primo_VE_User_Interface/010Primo_VE_Customization_-_Best_Practices#Creating_a_Search_Box_With_Deep_Links_to_Primo_VE)

# That's it!

## Questions?







Thank you!

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