

Notes from the CARLI Primo VE – Become an Expert Discussion Section on “Display Configuration” -- March 4, 2021

Customizing Labels

NLU: Lots of labels you can play around with and edit. They'll need to talk to others in the library to see what labels they'd like to change.

CARLI: Yes, there are lots of Library Card Options; it could be helpful to customize some of those.

Wildcard Searching

TIU: I wasn't able to get the single wildcard search to work in our local catalog. (It does work in the "everything" search.) In the webinar, Ex Libris said it might have to do with scope definitions, which I wasn't sure what to do with that.

CARLI: The wildcard search is officially defined as “*” [an asterisk in double quotes]

- [https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/150End_User_Help/02Performing_Advanced_Searches_in_Primo_VE#Performing_Broad_Searches_with_a_Wildcard](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/150End_User_Help/02Performing_Advanced_Searches_in_Primo_VE#Performing_Broad_Searches_with_a_Wildcard)
- See also
 - ? – enter a question mark to perform a single character wildcard search. For example, type **wom?n** to search for records that contain the strings **woman**, **women**, etc.
 - * – enter an asterisk to perform a multiple character wildcard search. For example, type **cultur*** to search for records that contain strings, such as **culture**, **cultural**, and **culturally**.
- You can use the wildcard and filters to count the number of records or to create “canned searches”:
https://knowledge.exlibrisgroup.com/Primo/Knowledge_Articles/How_to_get_a_numbers_of_records_with_a_specific_filters_in_Primo_VE

CARLI has been told by Ex Libris staff during implementation that a “*” search by itself (without any filters) is not reliable to return ALL of the records in the repository. Use at your own risk.

UIS: If you use % for the wildcard along with a filter, it seems to work. ? does provide some results but doesn't work as well as %. We were using the % for a list of movies for our students in quarantine.

CARLI: Please note that the % symbol is not documented anywhere for Primo VE searching, so use at your own risk. The fact that it is working now does not mean that it will always work if Ex Libris changes the system in future.

IWU also found that the wildcard * didn't work for IZ/NZ search scopes, but does work for CDI search scopes. % also worked.

Pre-Created Searches

DAC: Found the pre-created search capability interesting, i.e., the “video search” shown in the presentation.

Q: Can you search or pre-search by location?

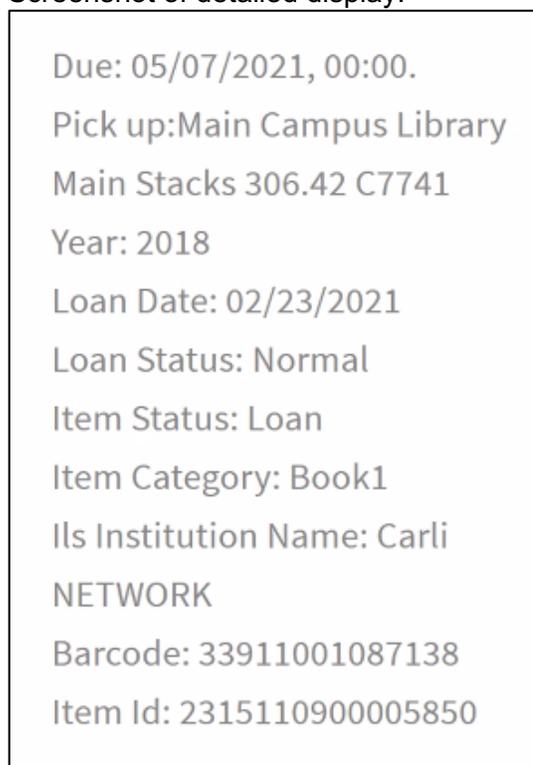
CARLI: No, unfortunately you cannot do an Advanced Search and filter by location as location isn't an option, so you can't create a pre-filtered search with that.

There is an Idea Exchange idea to add Location to Advance Search here if you wish to Vote or Comment: <https://ideas.exlibrisgroup.com/forums/308176-primo/suggestions/39421237-add-library-location-to-advanced-search-options>

Library Card Configurations

JJC: I'm curious if anyone has done much with the Loans Detailed Display settings in the Library Card Configuration. I was looking at that display in Primo and there's a lot of information that I think is fairly useless and cluttering for patrons, but I didn't know if anyone had found any pros or cons to modifying that. A lot of the information is CARLI network-related and could be confusing to patrons to see like "ILS institution name: Carli" Are there any pros/cons to removing extra information?

Screenshot of detailed display:



CARLI: Looking at a sandbox, it appears that most of those loan detail display items are ON by default. I-Share institutions certainly can turn them off if desired. However, remember that there is the Loans tab and the Requests tab in the Library Card Display; if you adjust the settings for the Loans tab, does it also affect the Request tab? How will it display? Testing is strongly recommended before making changes to what users see in Primo VE!

For the Library Card configuration options, see:

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/060Library_Card_Configuration](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/060Library_Card_Configuration)

And for the Full Display specifically:

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/060Library_Card_Configuration/Configuring_the_Loans_Full_Display_for_Primo_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/060Library_Card_Configuration/Configuring_the_Loans_Full_Display_for_Primo_VE)

“Has Activity” filter in the Library Card

Chat Question: I missed part of the Library Card section of the presentation, so maybe this was covered. Can you set the Activity Toggle so that it defaults to Has Activity? If a user is logged in and looking and library card loans or requests, there's a has activity toggle you can click on at the top that will limit the list of Institutions to only those at which the user currently has an active loan/request/fine etc.

CARLI: We don't think so, though many people have asked about that. The user has to click to apply the “has activity” filter. There is a broader Idea Exchange about the behavior of the list of institutions and the desire to condense them into a single list here:

<https://ideas.exlibrisgroup.com/forums/308176-primosuggestions/40091278-library-card-page>

MIL: [Demos this on active library card.] A clipboard icon is presented next to the institutions that you have materials loaned from. The default view includes every I-Share institution you've ever had activity with. Maybe there could be a new Idea Exchange entry to make the “has activity” toggle default or a way that a library could make it the default? It seems like the previous idea exchange idea mentioned above might be too difficult for programming purposes since they haven't done it yet and it has a high number of votes.

After the session, MIL created a new Idea Exchange idea for this; see this link to Vote and add your support and rationale with a Comment: <https://ideas.exlibrisgroup.com/forums/308176-primosuggestions/42833646-default-has-activity-instead-of-all-institution>

CARLI: Maybe we can look at creating custom CSS to switch the default.

The “Has Activity” filter and indicator for consortia was introduced to Primo VE in the Sept. 2020 release:

https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE/2020/010Primo_VE_2020_Release_Notes?mon=202009BASE

Filtered Searches

Chat Question: Did anyone catch all the URL changes [the Ex Libris webinar trainer] made in order to get filtered searches to work via the links menu? She had to edit the Primo search URL to make it work in the View Config menu, but I wasn't able to write down everything she said before she moved on to the next question...

Answer from CARLI:

1. Do a search in Primo VE (including search scope, terms, and any filters/facets) and get the results you want to link to.
2. Copy the URL from your browser and paste it in a text editor.
3. Remove the URL stem (<https://i-share-xxx.primo.exlibrisgroup.com>) so that it starts with /discovery/search...
4. Change the colon into a %3A
5. Paste into the URL box in the Primo VE View Configuration Links Menu tab entry

For Example, this search in TIU for psychology books:

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https://i-share-tiu.primo.exlibrisgroup.com/discovery/search?query=sub,contains,psychology,AND&filter=rtype,exact,books,AND&tab=LibraryCatalog&
```

search_scope=MyInstitution&vid=01CARLI_TIU:CARLI_TIU&lang=en&mode=advanced&offset=0

becomes

/discovery/search?query=sub,contains,psychology,AND&pfilter=rtype,exact,books,AND&tab=LibraryCatalog&search_scope=MyInstitution&vid=01CARLI_TIU%3ACARLI_TIU&lang=en&mode=advanced&offset=0

CARLI's webpage on how to create links for searches in Primo VE:

<https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/viewconfigs#pvelinks>. You can put these URLs on any external webpage, such as a LibGuide, or use them in the Primo VE Links menu link (with small modifications as described above).

NLU: We set up one for books and e-books at our institution. To set it up I did a search at our institution, set the filters I wanted, and adjusted. Ours for books looks like this:

https://i-share-nlu.primo.exlibrisgroup.com/discovery/search?tab=LibraryCatalog&search_scope=MyInstitution&vid=01CARLI_NLU:CARLI_NLU&facet=rtype,include,books,lk&offset=0

When a user does a search, it defaults to the pre-limited search for resource type=books.

UIS created such a link for a list of movies for our students in quarantine.

bX Recommender

DPU: Did CARLI's subscription to Alma/Primo VE also include BX Recommender? If so, I am wondering what BX info we might need to implement that recommended related titles column [the Ex Libris webinar] showed? I recall at one point Ex Libris talked about throwing the BX recommender in so it would be great if it could be confirmed one way or another.

CARLI: We did receive BX as part of the software-as-service package; there's some registration process, so CARLI staff will look into it and let institutions what, if anything, they need to do to implement bX in Primo VE.

Interest expressed from: LEW, DPU, JOL, ARU, DAC, IWU

Link to Payment Option in Library Card

MIL: I was interested in the "link to payment" option in the library card area, but I think I need some more information on how to make it work

CARLI: It seems that API linkages needed to set up the payment system.

See:

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/060Library_Card_Configuration/Configuring_the_Pay_Fine_Link_for_Primo_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/060Library_Card_Configuration/Configuring_the_Pay_Fine_Link_for_Primo_VE)

and

<https://developers.exlibrisgroup.com/blog/user-tokens-and-the-primo-apis/>

View Configuration > General tab > Set focus on Search Box

JUD: During the webinar, I checked the configuration option in the View checkbox for "Set focus on search box" I don't see any difference. What does it do?

CARLI: The cursor will be placed in the search box by default when someone loads the page. The Ex Libris webinar mentioned that it would help with screen readers, etc. See the entry on “Set focus on search box” in “Defining a View” on [https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/050Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE) Ex Libris has introduced many new configuration options in this area since we went live on Primo VE, so CARLI recommends checking this area to see if there are new options you may want to enable.

View Configuration > General tab > Highlight reference entry on top Displays in Primo VE as “Topic Overview”:

DAC: I don't know who else uses Topic Overview, but we've switched it on. Some of it's good, but some is way off (although we have two of the providers that are required). I'm a little uncomfortable with turning on Wikipedia as a backup, but I'm curious about others' experience with it. If I wanted to, would it be a e-resource I'd activate?

LEW: We have Topic Overview turned on, but it's hit or miss. Credo only returns results with there is a Topic Page for the term in Credo. So, not really useful. Has to be very general searches.

JOL: I had just started playing with the Topic Overview as well and can't get anything with results so don't know if it's not working or I'm just not hitting the right terms. That is definitely something I'd be interested in exploring further and hear more about how others got it working!

See

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/050Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Defining_a_View](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Defining_a_View) and scroll down to “Highlight reference entry on top” for more information.