Primo VE Admin Certification Video 01
Created for SUNY Libraries by SUNY Project Mgmt. Team

Link to Video (8 Minutes):
https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training/Primo_VE_Certification/01_Configuration_Overview

Related Viewing or Reading:

- Lynn’s 11/28 Session on Primo VE covers everything in this section quite well, and she demos where to configure, etc.
  - https://public.3.basecamp.com/p/WgQU67upD3SL8yECF8971c6X
- Lynn’s 1/18 Primo Overview Session:
  - https://ub.webex.com/recordingservice/sites/ub/recording/playback/aaffe231aca1452a8ade5324697bb91d
- Discovery WG’s Discovery in a Nutshell:
  - https://public.3.basecamp.com/p/Zw4woyKwc8n1YVnqPhdiYt4
- Jan Waterhouse’s Alma/Primo comparison
  - https://zoom.us/recording/play/YfFRpXTF263JIj2hLnQap8w0K7IySpBCs9xwX0RyaAOuUlkrbWQFbgQKXljdwIei?continueMode=true
- Main Landing Page for Primo VE Documentation:
  - https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo VE
- Introduction to Primo VE Videos (23 Minutes Total):
  - https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training/Introduction_to_Primo_VE/Getting_Started
  - Good videos on discovery vs. delivery and Primo Central Index.

Overview

The first portion of the first certification video explains how Primo VE streamlines the Primo-Alma environment.

Important—to configure Primo VE in Alma, you must have a Discovery--Admin user role. You may also want to have a Fulfillment Administrator or General Administrator Role (which will allow you to configure display logic rules, which we’ll discuss later in the certification.

Prior to Primo VE, Primo sites used a separate application, Primo Back Office, which was not part of Alma. But, Primo VE connects Primo and Alma much more closely, allows for immediate publishing of Alma records, and puts configuration of Primo into Alma, reducing the need to learn a new interface.

Search Configuration

- A Search Profile is the highest level container for what content is searched. These can contain different data scopes to search the appropriate collections/records you’d like.
Custom Local Data Scopes are searches and search parameters that you define to customize the search experience to meet your needs. For example, you could create a search profile that searches only a branch library or a specific type of resource such as ebooks.

Other Indexes: If you would like to have Primo serve as a single place for all discovery, you can configure indexes such as Worldcat as well, and then have these contained in search profiles.

Restricted Search Groups

Create user groups that you would provide searching resources for. The examples provided are alumni and faculty, with you being able to create resources that are available to only those groups.

A couple of use cases for restricted search groups could be:

- An article purchase on demand or token collection that you only wanted to have available to graduate students and faculty.
- An alumni search that only shows results from databases where the license allows alumni to have access to.
- A PDA/DDA search that you want to have accessible to only different patron groups: maybe one for faculty, and another for students, with different thresholds and parameters for purchasing.

Display Configuration

Views:

This is a way to completely customize a Primo instance. By default, you'll only have one view, and most campuses may not want to develop another view for Primo, but to just have a single view and customize that view for all their needs.

Some use cases for when you would want to create a separate view would be if you have separate libraries within your institution that would like to have separate branding, searches, and are going to be different in major ways.

But, most campuses will look like this with just a single view:

- You can always tell what view your Primo is by the url, which includes the view:
The view level is where you can customize much of the look and feel, branding, and visual parts of Primo.

It’s a good idea to go into your View by selecting edit to see what you can change via the view configuration. Open your Primo public search url to find what you can configure with where it is on the screen in Primo. The example below shows how to map the Links Menu to where it is on the live Primo screen.

![View Configuration](image-url)
• Display Configuration
  o This is where you can edit searches, displays, and how different types of searches (basic vs. advanced) function, and how results lists and records are displayed.

• Customization Package
  o If you have someone on staff who has expertise with web design, and can modify css, the customization package is a good way to work more in-depth with customizing the look and feel of Primo. But, you can do a lot of customization without this, so if you don’t have someone on staff who has this type of expertise, don’t worry—just stick to customizing Primo VE via the Alma Discovery administrative interface.

Managing Local Fields

• If there’s a field in your marc records that you’d like to have as searchable, you could add it here.
• For many libraries, they may want to initially have the local field of 986 (Aleph Sys. #) configured to make comparing Aleph and Primo/Alma easier.

Note that local fields can be named something different than the marc tag (as shown in the Aleph Sys. # Search below) and provide it with a display label, and these can be enabled as a facet or search.
• You can also use local resource types that can be configured to make a resource type something that would be more meaningful locally.
  o A specific use case may be if you have a teaching collection, and have something like “Teaching Kits,” which you may use an Alma resource type of “Kit” to read “Teaching Kits” so that your education students could search using that resource type.

Configuring Labels
• This is the way to change any content/wording that is NOT WITHIN THE RECORD itself.
• Lynn did a pretty good demo of customizing labels in this webinar:
  o https://ub.webex.com/recording/sites/ub/recording/playback/aaffe231aca1452a8ade5324697bb91d
  o If you start at about the 25/26 minute mark, that’s where the discussion of labels begins.

Request Configuration:
• The request configuration is important in that you can determine what does and does not display for request forms. However, the request configuration components and configuration are limited to the built in requests in Alma/Primo, and if you want to do more complex configuration of requesting options, you probably want to use display interface logic rules.
• The terminology of “Request Configuration” is actually wrong in the Video, and the section is “Get it Configuration” in configuration.
  - Of the get it configuration options, you would probably want to edit the resource sharing request to remove some fields, and you can also review your hold options.
  - A note that we won’t be using Digitization, so no need to customize that option.
  - The more helpful configuration that can help with requesting is not actually in discovery, but in fulfillment (note that you’ll need a fulfillment administrator or general administrator role).
Go to Config  Discovery Interface Display Logic  Display Logic Rules

- This will allow you to customize when different requesting options do and do not show to the user in Primo.

As the screenshot above shows, you can have a variety of rules apply to when different options show based on user group, material type, availability, etc.

Authentication:
You can use the same authentication integration profile as Alma, but depending on your authentication type, you may have to provide your campus IT with the Primo URL. The User Authentication will be populated with your Auth. Integration Profiles in Alma, plus internal to Alma (code Alma profile).

Make sure you activate (toggle to active) your authentication integration profile.
A good customization to make is to change the labels of your authentication, as some users will use your campus authentication, while others will use Alma authentication.

Below is an example of how a campus has changed their login links from the out of the box Login Link 1 and 2 to something that’s meaningful to their users:

Which they did with the login labels from the User Authentication config. for Primo VE:

Other:
The most important portion of this configuration is the ability to get to the Primo Central Index from Alma, and add resources to your search collections.

To get to the PCI, just select Central Index and Proxy Set up, then “View My Profile”
From there, you’ll be taken to the PCI activation wizard.

A few notes about the Primo Central Index (PCI):

The interface is changing very soon, as announced by Exlibris recently.

The Primo VE certification guide has directions on how to add PCI resources.

What you activate in the PCI isn’t automatically reflected in Primo searches. PCI publishing to Primo happens weekly, so there can be up to an 8-day delay in seeing your changes reflected in Primo. What you activate/add to Alma happens almost instantly. During implementation, PCI publishing to Primo is being sporadically run by ExLibris.