Primo VE Admin Certification Video 03
Created for SUNY Libraries by SUNY Project Mgmt. Team

Video 3: Configure Views (18 Minutes):

https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training/Primo_VE_Certification/03_Configure_Views

Related Documentation:

- https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/008Primo_VE_User_Interface/010Primo_VE_Customization_-_Best_Practices
- https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training/Introduction_to_Primo_VE/Configuring_the_User_Interface/01_Download_and_Upload_the_Customization_Package_(via_Primo_VE)
- https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/022Search_Configuration/010Configuring_Search_Profiles_for_Primo_VE

Views:

- Note that most libraries probably won’t have more than one view, but will just edit one view.
  - Feel free to create a dev. view to work on anything you’d like to test out, but don’t want to have affect your production view.
- Default view before any searches are conducted.
- Default view is the search used in Display in Discovery in Alma
- Views can be affiliated with a campus (note that no libraries in SUNY are using more than one campus) or a library.
- A variety of options can be set in the View Configuration.
- Links Menu

To configure Views, go to Discover→Configure Views:
From there the View Configuration screen has tabs that allow you to configure the rest of the items discussed in the video:

### Search Profile Slots:
- This is another example of complex and overlapping terminology in Alma/Primo, but if you just remember that Search Profile slots are how search profiles are added to views in Primo, that may be the simplest way to remember.
- At its most basic usage: a search profile doesn’t show to your user unless you put the search profile into a search profile slot.
- Search profile slots also offer a lot of customization options to have advanced search, brief results look/behave differently based on the slot. This could be a good way to make your user experience much more in tune with what they are searching.
- But, just like search profiles are a way to group scopes, search profiles slots are a way to group/cluster search profiles.
- The slide below goes into some good detail on what a profile does vs. what a slot does.
The slides and examples that the trainer gives in the certification video are pretty good use cases for search profile slots:

The use case provided is to have a libraries search profile slot that would allow your user to search different libraries at your campus.
But, basically, what search profile slots do is to add a layer in the search box for a user to drill down (either by the “suggestion” feature in the search or via a dropdown choice) to a search profile without going to an advanced search.

If you’re fine with the default search profile slots created for you, then no need to create new search profile slots right now, you just want to know that you need to create a search profile slot if you ever want to create different search profiles and have them as options in Primo. Or, you might want to add some search profiles to your search profile slots. There are a lot of options, so feel free to get creative.

Here’s a screenshot of SUNY Poly and Genesee to show the difference with the same search with a search profile slot with only one search profile vs. a search profile slot with multiple search profiles:

And, Genesee Comm. College that does have a Search Profile Slot:
There are a variety of uses of search profile slots, and it’s recommended you think through a few different ways that search profile slots could be useful to your campus and how your users find resources.

Here are some possible scenarios for search profile slots:
- Slots with multiple profiles:
  - Other libraries search with SUNY search profile and Worldcat search profile.
  - My institution slot with reserves search profile, library catalog search profiles, and everything search profiles
  - Library catalog slot with physical items search profile (limiting to physical books), ebooks search profile, and articles search profile.

As an exercise, think through what search profile slot you think would be useful and create it to get feedback from librarians and staff at your institution.

Advanced Search Configuration
- This has general configuration of indexes.
- Search profile slot specific customization is also possible.
- You can also change the order of choices in the dropdown to put the most used choices first.

Brief Results
- Can choose which facets to display, and how many choices within facets will display.
- Can be customized for different search profile slots

Brief Record Display
- Can choose what options displays for each record in the brief results display.
- At a very minimum, check to make sure that there isn’t anything active that won’t work for your library (i.e. citation management service).
Full Record

- The order of elements can be configured.
- Fields can be edited, deleted, or added.

Manage Customization Package

- If you have someone with web design or web development experience, this is a good way to make a variety of changes to the look and feel of Primo.
- Lynn reviewed this in our Primo session (she starts reviewing at about the 12 minute mark):
  - [https://proquestmeetings.webex.com/proquestmeetings/ldr.php?RCID=eafdbfbc4fb9e4d1e79f79e8646ff4a](https://proquestmeetings.webex.com/proquestmeetings/ldr.php?RCID=eafdbfbc4fb9e4d1e79f79e8646ff4a)