

Primo VE Admin Certification

Session #1: Scopes, Profiles, Slots, Views, Labels, and Tables

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Review of Guides

- Guides for all 6 videos are available to help contextualize the concepts in the Videos.
- <https://slcnny.libguides.com/primovecert>

[SUNY Libraries Consortium](#) / [SLC Guides](#) / [Training](#) / [Primo VE Administrator Certification Guide](#) / [Module 1: Configuration](#)

Primo VE Administrator Certification Guide

Home

Module 1: Configuration

Module 2: External Resources

Additional Resources

Module One: Configuration

This module contains 40 minutes of videos.

Videos to Watch

- [Primo VE 01: Configuration Overview \(8 minutes\)](#)
- [Primo VE 02: Search Profiles \(10 minutes\)](#)
- [Primo VE 03: Configure Views \(18 minutes\)](#)
- [Primo VE 04: Labels \(4 minutes\)](#)

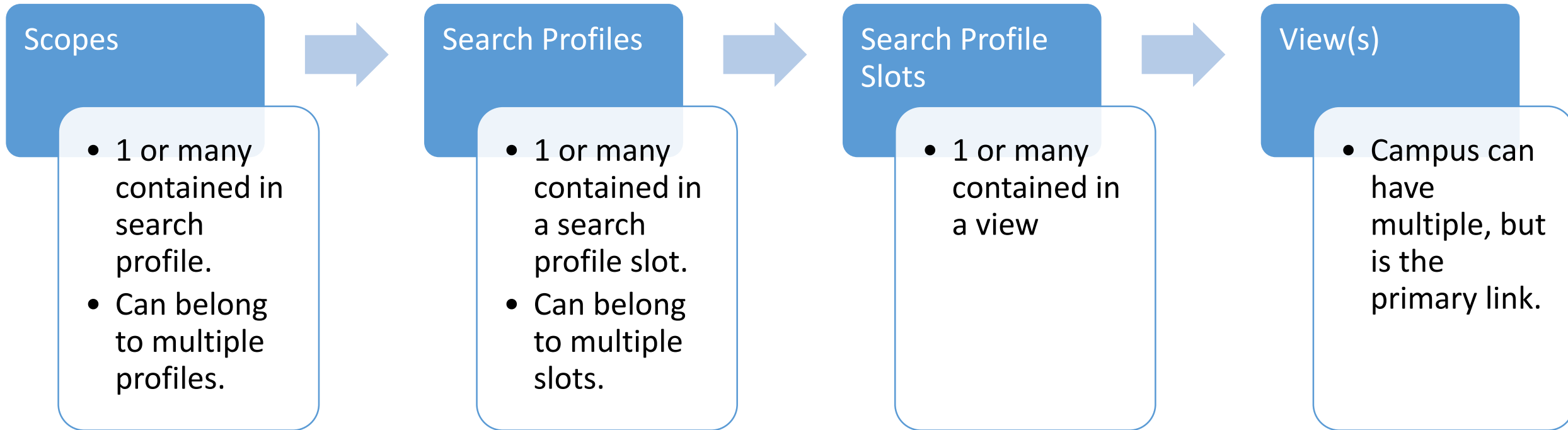
Guides to Videos

- [Guide to Primo VE Admin Video 1](#)
Guide to Primo Admin Video 1 with additional information and resources developed by the SUNY Project Managers.
- [Guide to Primo VE Admin Video 2](#)
Guide to Primo Admin Video 2 with additional information and resources developed by the SUNY Project Managers.
- [Guide to Primo VE Admin Video 3](#)
Guide to Primo Admin Video 3 with additional information and resources developed by the SUNY Project Managers.
- [Guide to Primo VE Admin Video 4](#)
Guide to Primo Admin Video 4 with additional information and resources developed by the SUNY Project Managers.

General Approach for Today

- Primo VE is too complex to get to every good nugget that you can customize in one session.
- I'll cover most of the content in the first 4 cert. videos.
- In general, I'll cover the methodology for customizing Primo VE:
 - Searching experience (Scopes/Search Profiles/Search Profile Slots/Views).
 - Look and feel via label customizations
 - Request options via display interface logic rules.
- I'll try to show/demo as much as I can.

Hierarchy of Primo VE



Scopes

- A flexible query of a data source, and can be used to refine what you're searching through your search profiles.
- Good way to filter out or refine inclusion of data from sources.
- Can use pre-made or custom scopes.
- Custom scopes have a wizard type interface that is helpful in guiding you through how to refine searches.
 - Inventory
 - Local Fields
 - Metadata
- Doesn't directly show to user.

Search Profiles

- How you group scopes together into a search that user can interact with.
- Good way to refine what you want a search to be.
- Can be “blended” comprised of local, PCI, and external resources.
- Can be viewable to user if you have more than one search profile in a search profile slot.

Search Profile Slots

- Search profile slots are how search profiles are displayed in views. Without a slot, a search profile isn't available to users.
- Slots offer further configuration abilities to tailor the display.
 - Advanced search
 - Brief results

Search Profiles and Slots in a Primo View

The image shows a screenshot of the SUNY GCC Library Primo search interface. The top navigation bar includes links for Library Search, Databases A to Z, Interlibrary Loan, Course Guides, Citation Guides, and Journal. A search bar with the placeholder text "Search anything" is prominent. A dropdown menu is open, listing search options: Everything, GCC Library Catalog, Articles, SUNY Catalog, and WorldCat. The "GCC Library Catalog" option is highlighted. Below the search bar, there is a section titled "How does this work?" which explains that Primo provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more. It also mentions that Primo helps manage research and lists several features: Renew books and videos, Create favorites lists, Export citations to Refworks and Endnote Web, and View full search results. Two blue arrows point to specific elements: one points to the "GCC Library Catalog" dropdown menu, which is labeled "Search Profiles" in a blue-bordered box; the other points to the "WorldCat" option in the dropdown menu, which is labeled "Search Profile Slots" in a blue-bordered box.

SUNY GCC LIBRARY

Library Search Databases A to Z Interlibrary Loan Course Guides Citation Guides Journal

Search anything

Everything
GCC Library Catalog
Articles
SUNY Catalog
WorldCat

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.)

Search Profiles

Search Profile Slots

Demo: Adding a Scope/Profile/Slot for Physical Material

Will add a few scopes for different physical materials

Add the scope to a search profile

Add the search profile to a slot

Configuring Views

- This is a great way to remove extraneous information or customize what shows in:
 - Search Profile Slots
 - Brief Results
 - Brief Record Display
 - Links on Top
 - Recommendation to remove OOB Database Search
- Customization Package is accessible at view level.

Customization Package: Demo

- Campuses may want to edit their homepage language or text, which is relatively simple to do.
- More advanced

The screenshot shows the Primo Studio customization interface for the view '01SUNY_INS:01SUNY_INS'. The interface includes a header with the view name and a navigation menu with tabs for 'General', 'Links Menu', 'Search Profile Slots', 'Advanced Search Configuration', 'Brief Results', and 'Brief Record Display'. The main content area is divided into several sections:

- Create Customization Package:** A section with a 'Go to Primo Studio' link.
- Download Package:** A section with three 'Download' buttons for 'Template View Customization Package', 'Current View Customization Package', and 'Download Central Customization Package'. A blue arrow points to the 'Current View Customization Package' button, which is highlighted by a blue box containing the text 'Current view is your customization package'.
- Upload Package:** A section with a 'Customization Package' input field and a file upload icon.
- Upload Logo:** A section with 'Upload Logo File' and 'Logo Clickable URL' input fields. The 'Logo Clickable URL' field contains the text 'https://sunypoly.edu/library'.
- Inheritance:** A section with an 'Inherit from Central Package' checkbox.

Labels and Tables

- Pretty much everything on the screens in Primo are controlled by labels that are nested in tables.
- Don't worry about remembering where these are, just search for them.

The Label Code Table

All Code Tables

You are configuring: SUNY Poly [Change Organization Unit](#)

Search for Labels

Code

Language **English**

▲ Table Name	↕ Sub System	↕ Description	Updated By	Custom
1 Advanced Media Type Labels	Discovery UI Labels	Advanced Media Type Labels	exl_impl	✓
2 Advanced Search Index Fields Labels	Discovery UI Labels	Advanced Search Index Fields Labels	-	
3 Advanced Search Languages Labels	Discovery UI Labels	Advanced Search Languages Labels	-	
4 Aria Labels	Discovery UI Labels	Accesibility aria labels	-	
5 Basic Search Pre-Filters Labels	Discovery UI Labels	Basic Search Pre-Filters Labels	-	
6 Browse Search Labels	Discovery UI Labels	Browse Search Labels	-	
7 Calculated Availability Text Labels	Discovery UI Labels	Contains code tables of Calculated Availability Text	-	

Most of the labels are pretty straightforward, other are “logical”

- I’m almost surprised the labels aren’t defined as “logical” or “itemized” (bad Alma humor).
- But, some labels are context sensitive, and show different information based on what you’re user is viewing.
- A great example is Calculated Availability Text Labels (what displays “Available Online”)

A fair amount of discovery customization is in Fulfillment Configuration

- Display Interface Logic Rules
 - A great way to hide options/services based on user groups.
 - GCC has some great examples of how to use this to hide options based on user group and electronic services.

< Discovery Interface Display Logic

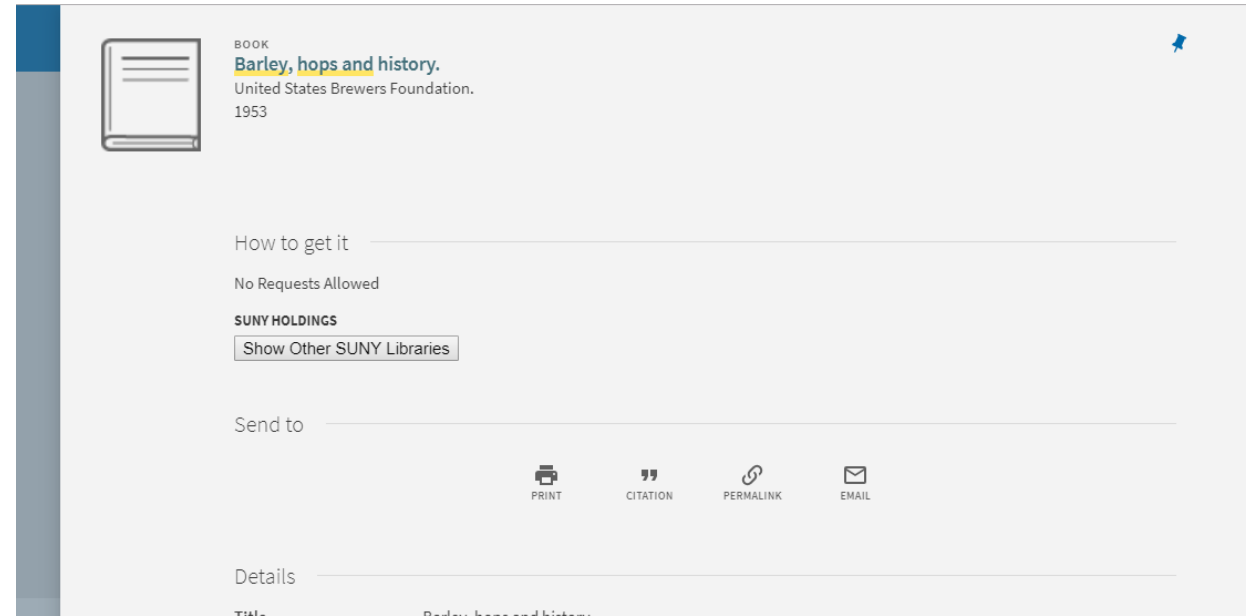
Institution Rules			
		Active	Rule Description
⋮	1	<input checked="" type="checkbox"/>	Hide service Purchase Request
⋮	2	<input checked="" type="checkbox"/>	Hide service General Digitization Request
⋮	3	<input checked="" type="checkbox"/>	For user groups County Patron,County Student,Out-of-County Patron,Out-of-County Student: Hide service Resource Sharing Request
⋮	4	<input checked="" type="checkbox"/>	For user groups County Patron,County Student,Out-of-County Patron,Out-of-County Student: Hide service General Electronic Service with Service =
⋮	5	<input checked="" type="checkbox"/>	Hide service Resource Sharing Request if exists service Hold Request
⋮	6	<input type="checkbox"/>	For user groups Advanced Studies,Faculty Emeritus,Faculty FT,Faculty PT,GCC Student FT,GCC Student PT,Meritorious Staff,Staff FT,Staff PT: Hide Service = ILLiad if exists service Resource Sharing Request
⋮	7	<input checked="" type="checkbox"/>	Hide service Resource Sharing Request if exists service General Electronic Service with Service = ILLiad

Remove Selected Deactivate Selected

Network Rules

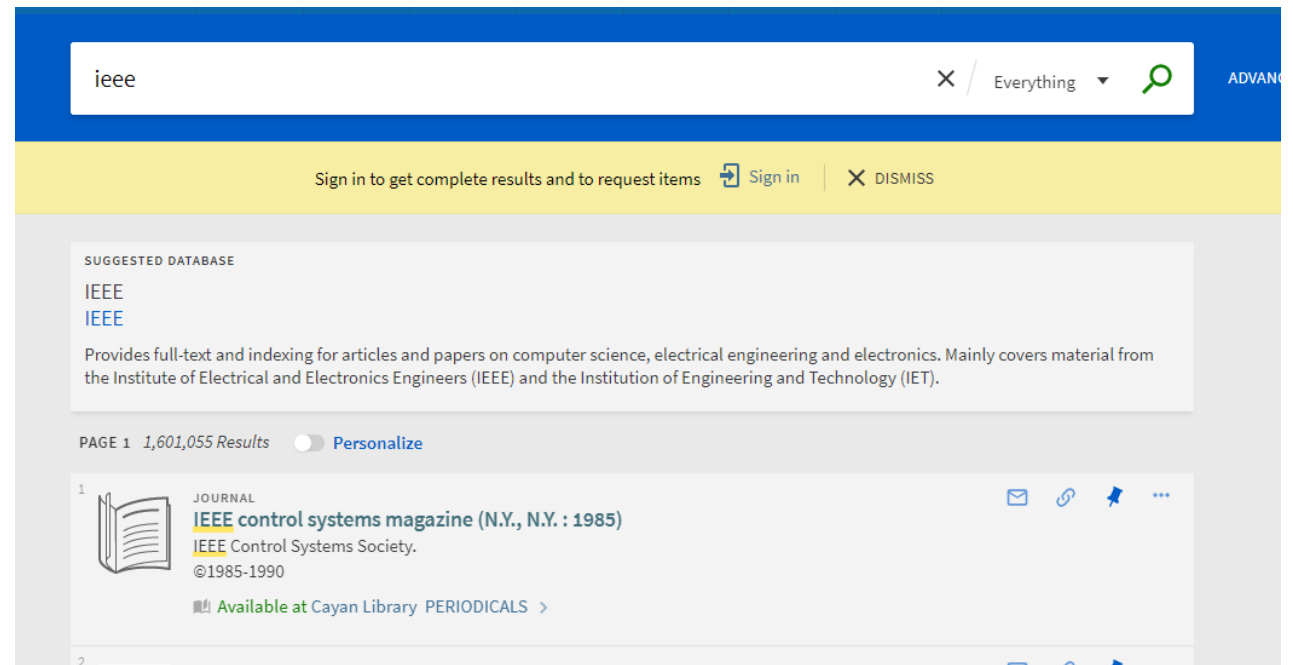
General Electronic Services: Display Interface Logic

- This is where an ILLiad campus would put their ILLiad request.
- Lynn has some great documentation on how to set up ILLiad.
 - https://3.basecamp.com/3765443/buckets/8186639/messages/1555209837#_recording_1580634762
 - More developed faq coming soon too.



Bonus: Resource Recommender

- This isn't on the admin test, but it's nice functionality to feature:
 - Resources
 - Webpages
 - Librarians



Try to Break Up Primo VE Customization/Work into Manageable Projects

- Requesting
- Brief Results
- Full Record
- Advanced Search
- Scopes, Search Profiles, Search Profile Slots
- Configure View

Session 2: External Data Sources in Primo VE

- Lynn will be presenting on 2/15 from 3:00-4:00.
- Will cover discovery import profiles that can be used to harvest
 - Dspace/Digital Commons/Repositories
 - Libguides
 - Content DM/Digital Heritage