1. Primo VE Configuration Overview

1.1 Primo VE Overview

Notes:

Hello, and welcome to this overview of Primo VE Configuration.
1.2 Agenda

Notes:

In today’s session, we’ll start with an introduction to Primo VE, Primo optimized for Alma. Then, we will take a look at how search, discovery, requests, and authentication can be configured. We will also see other configurations available in Primo VE.

1.3 Introduction
1.4 Introduction

Primo VE is a new deployment model of Primo. It simplifies Primo back end processes and takes a step further in optimizing the management of Primo with Alma by utilizing the Alma platform.

Primo VE, coupled with the new Primo UI, will enable libraries to benefit from:

• Major operational improvements and the Streamlining of publishing processes
• It allows for real-time discovery of records created in Alma and Task-oriented configuration and setup.
• Primo VE unifies the back office management of Primo and Alma, and Reduces the number of duplicate administrative processes.
• And lastly, it provides an enhanced user experience
1.5 Primo VE Configuration Menu in Alma

Notes:

Here is the Primo VE Configuration menu in Alma. This Discovery menu allows us to configure all aspects of Primo, including the data we want to display, how we want records to be discovered, the look and feel of the Primo user interface, and more - it's all done here. We have taken a task-oriented approach in implementing and configuring Primo with Alma - first, we define the data we want to display, and then we go on to define how that data is presented. Next, we determine how requests and holds function, how authentication is performed, and how a few other specific settings are configured.

Some of the more common actions are also accessible in the Discovery section at the top of the Alma page.
Discovery (Slide Layer)

In order to see the Discovery menu in Alma, you will need to have a user with the Discovery Admin role.

Let's take a closer look at each of the sections in Primo VE's Discovery menu.

Notes:

1.6 Alma Role
1.7 Search Configuration

- Introduction
- Search Configuration
- Display Configuration
- Request Configuration
- Authentication
- Other
- Session Review

Notes:

Search Configuration

1.8 Search Configuration

Search Profiles:
- Determine which records are available to search
- Determine how records are grouped for searching (full catalog, specific records in a library or collection, etc.)

Restricted Search Groups:
- Define specific user groups with exclusive access to specific resources

Notes:
Search Configuration contains several areas that define what patrons will be searching when they use Primo.

In the Search Profiles section, we can determine which records are available to search, and how we group those records for searching. For example, we may want patrons to have the options to search the full catalog at once or conduct a search for materials in a specific library or location.

Search Configuration also contains an area where you can configure restricted search groups. Restricted search groups are used when you have a specific group of users that have exclusive access to certain resources. For example, you may have special collections that are only accessible to alumni, or faculty. Or you may want a specific set of resources to appear in the search results only when the user is on campus.

### 1.9 Search Profiles

![Search Profiles](image)

- Search Profiles tab – configure search profiles to contain default and/or local data scopes

**Notes:**

The Search Configuration > Search Profiles area has three sections; Search Profiles, Custom Local Data Scopes, and Other Indexes.

In the Search Profiles tab, we can configure search profiles to contain scopes, or sets of records. For example we could configure a search profile to include a scope that searches both the Catalog and Primo Central, a scope that searches just the catalog, and a scope that searches just Primo Central.

In the Custom Local Data Scopes tab, we can configure local data scopes based on conditions we define. For example, we might want to create a scope to include just the records in a specific collection or resource type. We could also set up a scope to contain course reserves.

In the Other Indexes tab we can configure 3rd party indexes to work with Primo, including the EBSCO API and Worldcat.
Custom Local Scopes (Slide Layer)

- Search Profiles tab – configure search profiles to contain default and/or local data scopes
- Custom Local Data Scopes – configure groups of records (including special collections, course reserves, etc.)

Other Indexes (Slide Layer)

- Search Profiles tab – configure search profiles to contain default and/or local data scopes
- Custom Local Data Scopes – configure groups of records (including special collections, course reserves, etc.)
- Other Indexes tab – configure 3rd party indexes like EBSCO, Worldcat, etc.
1.10 Display Configuration

Notes:
Display Configuration

1.11 Display Configuration

Notes:
Display Configuration:
- Configure basic and advanced search functions
- Configure brief and full results display
- Configure local fields for display
- Create and implement local resource types
- Change labels in the user interface
Display configuration allows us to configure the user interface of Primo, determining how basic and advanced searches function, and how the brief and full results display. We can also configure local fields for display, create and implement local resource types, and change labels in the user interface.

1.12 Configure Views

![Configure Views](image)

**Notes:**

The first area in Display Configuration is Configure Views. Each of these views here correspond to a view, or user interface, in Primo.

When you add a new view, or edit an existing view, you will have options to configure General attributes of the view, like whether it should be the default view for your institution, what the default language will be, and the timeout URL.

You can also configure the links that appear in the main menu navigation at the top of the screen, select the search profiles that are used in the view, and how the advanced search is configured. You can also determine how the results list and full records are displayed within Primo. And lastly, from here you can access the Primo View’s customization package, which allows you to brand the Primo View with your institutions’ logos, images and colors.
Add or Edit (Slide Layer)

1.13 Manage Local Fields

Notes:

The next section of the Display Configuration is Manage Local fields. While Primo is already configured to display and search many fields in the MARC record by default, it's possible to add local fields to the display and search here.
1.14 Local Resource Types

It’s also possible to create local resource types, or formats. Primo calculates resource types based on MARC standards, but if you have materials with a resource type that is not represented in Alma, for example holograms, you can define a custom resource type. This allows you to identify materials and assign them a resource type based on any of the data in the MARC or the Dublin Core records.

1.15 Labels

- Customize any text on the screen in Primo
- E.g. Facets labels, advanced search field labels, alert messages, etc.
- Allows you to search for the label by its current text and edit it

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Notes:

Lastly, we have the Labels section in the Display Configuration. This area allows us to customize any text on the screen in Primo with labels that is not within the record data.

For example, you may want to rename the ‘Tweak my results’ header above the facets in Primo, and call it ‘Refine my results’ instead. Or you may want to change the label on an advanced search field, or edit the text of an alert message within Primo.

The Labels area allows you to search for the label by its current text, and once you've found it, you can edit it.

Labels in UX (Slide Layer)
1.16 Request Configuration

Agenda

- Introduction
- Search Configuration
- Display Configuration
- Request Configuration
- Authentication
- Other
- Session Review

Notes:

Request Configuration

1.17 Request Configuration

Request Configuration:

- Configure request forms
- Define the fields that display in user interface.
Notes:

In the Request Configuration, we can configure the request forms and define the fields that will be displayed to the user.

1.18 Authentication

Notes:

Authentication
### 1.19 Authentication

**Notes:**

In Primo VE, we use the authentication profiles that are already set up in Alma. The Authentication configuration allows us to select which authentication methods would be seen by patrons when logging into Primo and to configure the labels patrons will see in the Primo user interface.

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### 1.20 Other

**Agenda:**

- Introduction
- Search Configuration
- Display Configuration
- Request Configuration
- Authentication
- Other
- Session Review
Notes:

Other

1.21 Other

The Other configurations menu contains several miscellaneous configurations such as the settings for interoperability between Alma, Primo, and Primo Central and configurations to perform deep-link redirects.
1.22 Session Review

Notes:

Session Review and Quiz

1.23 Session Review

Notes:

In this session we covered:

- What Primo VE is
- Benefits of Primo VE
- How to access Primo VE configuration in Alma
- A high-level view of each of the sections in Primo VE configuration

Next Steps:

- Review the recommended articles
- Take the quiz
- Continue to the next training session

Published by Articulate® Storyline www.articulate.com
In this session we covered:

- What Primo VE is
- The benefits of Primo VE
- How to access Primo VE configuration in Alma
- A high-level view of each of the section in Primo VE configuration.

Please refer to the Recommended Articles section for additional information. After the brief quiz that begins on the next page, you can continue on to the next training session in this series.

**1.24 Question 1**

*(Multiple Choice, 10 points, 1 attempt permitted)*

In order to configure Primo VE, which Alma role is needed?

- Discovery Administrator
- User Administrator
- Fulfillment Administrator
- Primo VE Administrator
- Primo VE Manager

<table>
<thead>
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<th>Correct Choice</th>
<th></th>
</tr>
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<tr>
<td>X</td>
<td>Discovery Administrator</td>
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<tr>
<td></td>
<td>User Administrator</td>
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<tr>
<td></td>
<td>Fulfillment Administrator</td>
</tr>
<tr>
<td></td>
<td>Primo VE Administrator</td>
</tr>
<tr>
<td></td>
<td>Primo VE Manager</td>
</tr>
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</table>
Feedback when correct:

In order to configure Primo VE, one must be assigned the Discovery Administrator role in Alma.

Feedback when incorrect:

In order to configure Primo VE, one must be assigned the Discovery Administrator role in Alma.

Notes:

Correct (Slide Layer)
1.25 Question 2

(True/False, 10 points, 1 attempt permitted)

Correct Choice

<table>
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<th>Correct</th>
<th>Choice</th>
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<tbody>
<tr>
<td>X</td>
<td>True</td>
</tr>
</tbody>
</table>

Incorrect (Slide Layer)
False

**Feedback when correct:**
Primo VE is configured in the Discovery area of Alma.

**Feedback when incorrect:**
Primo VE is configured in the Discovery area of Alma.

**Notes:**

**Correct (Slide Layer)**

![Quiz: Configuration Overview]

Primo VE can be configured in the Discovery area of Alma.

- **True**
- **False**

Primo VE is configured in the Discovery area of Alma.

**Correct**
Incorrect (Slide Layer)

1.26 Thank You!

Notes:

Thank you for joining us! We hope that you have found this information helpful to your understanding of Primo VE. For more information, please visit the Ex Libris Knowledge Center.
1.27 About this Training

Notes:

1 (Slide Layer)

This presentation assumes that you have viewed these training sessions:
* N/A
2 (Slide Layer)

About this Training

Prerequisites
Lesson Objectives
Target Audience
Copyright

By the end of this training session, you will be able to:
- Understand what Primo VE is
- Understand the benefits of Primo VE
- Know how to access Primo VE configuration in Alma
- Understand what components are included in Primo VE configuration

3 (Slide Layer)

About this Training

Prerequisites
Lesson Objectives
Target Audience
Copyright

Target Audience:
- Staff responsible for configuring Discovery (Primo VE)
About this Training

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