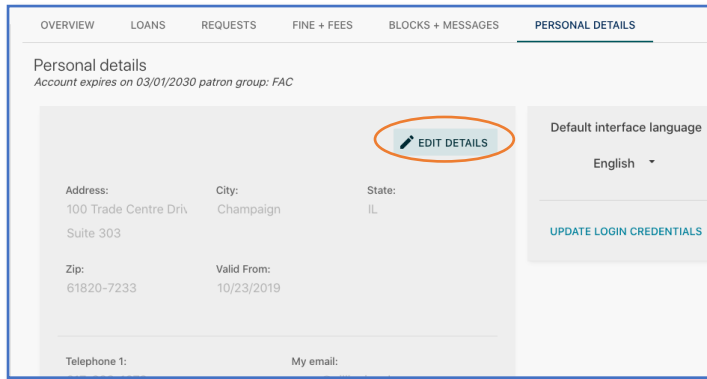


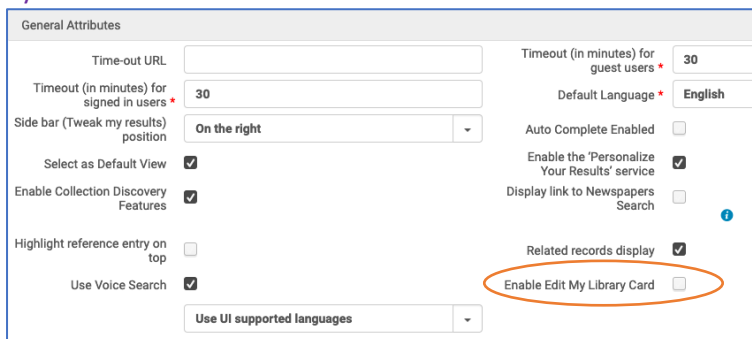
**Notes from the Primo VE – Become an Expert Discussion Section on “Introduction to Discovery”  
January 28, 2021 – Edited 2/3/2021**

“Edit Details” button in Primo VE My Library Card

- In the Ex Libris webinar, it came up that Users can Edit their personal info in Primo VE My Library Card > Personal Details tab



UNLESS the institution removes this ability by setting an option in [FOLLOW-UP EDIT 2/3/2021:] Alma Configuration > Discovery > Display Configuration > Configure Views > Edit the View > General tab > General Attributes section > UNCHECK Enable Edit My Library Card. It is checked by default. Alma Configuration > General > General Configuration > Other Settings > parameter key: `primo_patron_info_updatable` (free text description: user is updatable) = N. This is set to Y by default.



- It is especially important that institutions using SIS Loads to create/update User Records do not allow Users to edit their information directly via Primo VE.
- **CARLI strongly recommends that all I-Share libraries investigate this setting and consider adjusting it to N so that users cannot edit their own information directly.** Users should be encouraged to contact the library or their institutional registrar with information updates.
- NLU turned off this setting in Alma config right away and reported to the Discussion group that it removed the address information from view entirely. They then asked if there is a way to hide "Personal Details" tab now that it doesn't allow editing or in NLU's case, show much useful info.
  - Yes, Hiding the Personal Details tab is likely possible with CSS.
    - It was noted that if you hid the whole tab, you would also be hiding the Default Interface Language choice.
- Post-Discussion Session Follow-up by CARLI staff:
  - However, as it turns out, what NLU was seeing and showed attendees in live screensharing was NOT due to changing the `primo_patron_info_updatable`

configuration option. It was because the User record being shown did not have a **Preferred Address** set in the User Record. Having a Preferred Address is important during the creation of Linked User records for AFN resource sharing across I-Share, and it is also apparently needed to display an address in Primo VE!

- There was some concern about if the “Preferred Name” field was editable in Primo VE and if Editing were disabled, would users not be able to set their “Preferred Name”. However, later testing shows that the Preferred Name is never editable from Primo VE (though it does display as the User’s Name when they are logged in) and that users must contact the library to have a Preferred Name added to their Alma User Record, or it must come from the institutional system data as part of the SIS load.

#### CDI sessions were mentioned during Ex Libris webinar

- Where to sign up for them or view them?
  - CDI & Consortia, Jan. 1 at <https://www.youtube.com/watch?v=tKbawBkpt1s>
  - Alma/ CDI single activation, <https://www.youtube.com/watch?v=lb2rHn4RM54>. Please note that only CARLI staff can edit any Alma Network Zone configurations.
  - Overall information on CDI:  
[https://knowledge.exlibrisgroup.com/Primo/Content\\_Corner/Central\\_Discovery\\_Index/Documentation\\_and\\_Training/Documentation\\_and\\_Training\\_\(English\)/Recorded\\_Webinars\\_and\\_Training](https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_(English)/Recorded_Webinars_and_Training)

#### Auto-complete for searches

- NCC reports that they tried to turn on auto-complete in the Primo VE Simple Search box but could never get it to work. Anyone successful with it? JOL just tried it and it worked. Jessica: The Ex Libris trainer mentioned that the auto-complete information was derived from searches performed in the Primo VE; perhaps it takes time to "recognize" searches/words to auto-complete and we were too new with the system?
- Post-Discussion Session Follow-up by CARLI staff:
  - Later testing confirmed that NCC does not have Auto-Complete enabled, but JOL does.
  - To turn on Auto-Complete, go to Alma Configuration > Discovery > Display Configuration > Configure Views > Edit the View > General tab > General Attributes section > Check the box next to “Auto Complete Enabled”

The screenshot shows the 'View Configuration' page in Alma. The 'General Attributes' section is expanded, and the 'Auto Complete Enabled' checkbox is checked and circled in red. Other visible settings include 'Time-out URL', 'Timeout (in minutes) for signed in users' (30), 'Timeout (in minutes) for guest users' (0), 'Default Language' (English), and 'Enable the Personalize Your Results service' (checked).

### Newspaper Search feature in Primo VE

- The Ex Libris webinar presenter mentioned that you'd lose out on CDI newspaper citations if you set up the Newspaper Search feature. An I-Share library that has already set it up was concerned about this loss and asked if anyone else was using it and had noticed. No one else in session appears to be using it.
- Jessica provided URL to newspaper search documentation in chat and noted that there are several steps to configuring it:  
([https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/130Configuring\\_Advanced\\_Search\\_Interfaces\\_for\\_Primo\\_VE/Configuring\\_Newspaper\\_Search\\_for\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/130Configuring_Advanced_Search_Interfaces_for_Primo_VE/Configuring_Newspaper_Search_for_Primo_VE)).

### Journal Search feature in Primo VE

- QCY: Planning to talk to departments to get students involved in reading journals involved with their subject area. Was planning to organize this manually, but the Journal Search feature might be very useful for this with less work. This feature is similar to subject categories in SFX.
- For more information, see  
[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/130Configuring\\_Advanced\\_Search\\_Interfaces\\_for\\_Primo\\_VE/Configuring\\_Journal\\_Search\\_for\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/130Configuring_Advanced_Search_Interfaces_for_Primo_VE/Configuring_Journal_Search_for_Primo_VE)

### Virtual Browse feature in Primo VE

- JOL is interested in the virtual browse settings and will look further into them. Jessica notes it is on by default. The Ex Libris session mentioned it can be configured like a physical shelf browse and contain only physical items, or can be configured as a subject browse to include both physical and electronic resources.
- For more information, see  
[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/050Display\\_Configuration/010Configuring\\_Discovery\\_Views\\_for\\_Primo\\_VE#Configuring the Browse Shelf Service](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Browse_Shelf_Service)

### Fetch Item

- Denise mentioned the Fetch Item (Citation Linker) feature which, if enabled, allows searching by DOI and other citation details:  
[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/130Configuring\\_Advanced\\_Search\\_Interfaces\\_for\\_Primo\\_VE/Configuring\\_Fetch\\_Item\\_for\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/130Configuring_Advanced_Search_Interfaces_for_Primo_VE/Configuring_Fetch_Item_for_Primo_VE)

### Searching by date

- An attendee mentioned that they were glad to learn about the difference between the Creation Date facet and the Date-newest/Date-oldest sorting. If you do a search (by default it is sorted by Relevancy) and then resort the results by Date-newest/Date-oldest, you will lose the relevancy of the results. Another way to maintain relevancy would be to search by Relevancy and then use the Creation Date facet instead to refine the results to a date range.
- Post-Discussion Session Follow-up by CARLI staff:
  - The Creation Date facet may be enabled/disabled in Alma Configuration > Discovery > Display Configuration > Configure Views > Edit the View > Brief Results tab, and the

Creation Date facet Label may be changed in Alma Configuration > Discovery > Labels > Facet Labels table > facets.facet.facet\_creationdate

#### Manipulating CDI

- Chat Question: Is anyone doing changes to CDI like boosting (they don't have much experience with it/know much about it yet)? No one spoke up with any experience. SXU noted that they have added HathiTrust public domain titles.

#### General thoughts on having this as a post-webinar discussion section

- General consensus that it will be useful (this Ex Libris session was pretty basic--not much to discuss on this). Good idea putting it right after the ExL webinar; having the 15-minute break is useful. Recording the discussion session is useful.
- CARLI will continue to host these Discussion sessions after the remaining 11 [Ex Libris Primo VE - Become an Expert Webinars](#) and post the recordings and summary notes.