

## Notes from the Primo VE – Become an Expert Discussion Section on “How Primo Works” February 4, 2021

### LibGuides Integration

MLS wants to know if any other CARLI libraries have tried LibGuides integration?

- Others mention in chat they are interested in doing it but have not yet tried.
- Jessica, from the CARLI office, suggests watching the up-coming “External Data Source Session” in the Ex Libris webinar series that will be on April 1, since that should include info about incorporating all sources including LibGuides.
- UIC might have integrated LibGuides already, based on conversations CARLI staff have had with them.

### Configuration Settings “on by default”

Someone commented that they often find that settings Ex Libris says are “on by default” are not actually “on” in their Alma configuration. For example, the “default” automatic stemming wasn't on, and it doesn't appear that local boosting is on either. CARLI Office staff state that there could be several reasons for it:

- “On by default” would have been in Fall 2019 with the creation of our test environments for Alma and Primo VE, so settings might not have been a “default” then or the feature might be new.
- Since Fall 2019, people have done editing in their Alma/Primo VE configurations and someone at the institution might have turned something off/on in that time.
- For the specific example of boosting local items over CDI items, it might be due to the fact CARLI started on Alma/Primo VE before CDI was part of it. Our test instances were up in Fall 2019 but our CDI was not available until Feb. 2020.
- Another reason could be because consortial Alma/Primo VE system set-up is a little different than a stand-alone system like Ex Libris shows in training. Moral of the story: never assume something is on by default.

### Boosting Results

MIL: Has anyone played around with ranking and how to boost local results (that was shown in presentation)?

- No one in session has worked on it. One person said they thought that an institution's Local results were already boosted vs. Central Discovery Index (CDI) results.
- Can look at search profiles to see what is being boosted in blended searches.

What are the differences between the two areas where institution boosting can be turned on?

There are two boosting places for Primo VE in Alma configuration, depending on the type of boosting:

1. [Institution Boosting](#) can be found in Alma configuration > Discovery > Search Configuration > Ranking Configuration > Institution Boosting

## Institution boosting

The screenshot shows the 'Ranking Configuration' interface. It features a table with columns: Field, Name, Boosting Factor, Updated By, and Last Updated. The first row shows '7 addtitle' with a boosting factor of 0.01. Below the table are three sections: 'Date Boosting', 'Resource Type Boosting', and 'Institution Boosting'. The 'Institution Boosting' section is highlighted with a red border and contains a table with columns: Active, Name, Boosting Factor, Updated By, and Last Updated. The first row in this table shows 'Boost My Institution' with a boosting factor of 1 and an active toggle.

Field	Name	Boosting Factor	Updated By	Last Updated
7 addtitle	Additional title	0.01	-	-

Active	Name	Boosting Factor	Updated By	Last Updated
<input checked="" type="checkbox"/>	Boost My Institution	1	-	-

Please note in the [Ex Libris documentation](#) the boosting factor rules for Institution Boosting: “To specify a positive boost, enter a value greater than 1.0 (such as 2.3). To specify a negative boost, enter a value between 0.0 and 1.0 (such as 0.01).”

Institution boosting is related to consortial environment, boosting one's own institution's results over other institutions in the consortium, and seems to be a setting for consortia only.

RVC: Seems like everyone would want to turn on local boosting.  
CARLI Staff agree.

2. Boosting [Local results vs. CDI items](#) in blended search profiles can be found here: Alma Configuration > Discovery > Search Configuration > Search Profiles. Go to a specific “Blended” search profile, click on the ... (ellipsis button) and select Configure Blending. On the next page choose ... (ellipsis button) for “Local” and select Customize.

## Boosting local results over CDI results in Blended search profiles

The screenshot shows the 'Edit blending configuration for Search profile: DN\_and\_CI' interface. It has 'Back' and 'Save' buttons. The 'Define Boost Type' section has 'Choose boost type:' with radio buttons for 'Boost' (selected) and 'Deboost'. The 'Define Parameters' section has a 'Boost factor' input field with the value 2.5. Below this are two rows of radio button options: 'Boost records with a score:' with options 'high', 'medium' (selected), 'low', and 'none'; and 'Position of boosted records' with options 'top (2nd record)' (selected), 'middle (5th record)', 'bottom (9th record)', and 'none'. A 'Number of results to boost' input field has the value 5.

Note in the [Ex Libris documentation](#) the Boost and Deboost factors that can be used with Blended Search profiles are:

- To Boost: The minimum factor must be greater than 1 (such as 1.5), and the maximum factor must not exceed 10.
- To Deboost: The number that is multiplied to the record's original rank to decrease its rank. The factor must be a number between 0 and 1 (such as .25).

Jessica from CARLI: Note that all of these boosting options are global and not within a specific Primo VE “View”--changes to boosting and controlled vocabs will affect ALL Primo VE views you have--can't restrict to only a single view or a test view. As mentioned in the Ex Libris webinar, the best practice would be to first run some searches and take notes on the results you get. Then make your changes in configuration and run the searches again. Compare results and see if you get the outcome you wanted.

The CARLI Office encourages I-Share institutions to try boosting results and feel free to report back in future sessions.

### **Easy Active**

RVC: What is the “Easy Active” option discussed in the session?

Denise from CARLI: whether a collection is “on” for contributing to CDI. All I-Share institutions are “Easy Active” by default for all active e-collections in your IZ. There are a few e-collections that don't allow CDI but that's a very small number. Other Alma institutions outside of I-Share may be “selectively” active if they migrated to CDI from the “Primo Central Index” but this does not apply to I-Share institutions. You can opt out of CDI for particular collections if you wish, but would then not show citations from your activated resources.

### **Controlled Vocabulary**

One institution is interested in the Controlled Vocabulary option, but wasn't sure where you make a change like this? Ex Libris documentation can be found here:

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/120Other\\_Configurations/Discovery\\_Customer\\_Settings#Search\\_Expansion\\_with\\_Controlled\\_Vocabulary](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/120Other_Configurations/Discovery_Customer_Settings#Search_Expansion_with_Controlled_Vocabulary)

According to the Ex Libris documentation: “The Controlled Vocabulary service is an external Primo service (similar to AutoComplete) that expands user searches with words and phrases that constitute variations of the search term with the same meaning, thereby increasing the accuracy of the users' searches.”

To enable Controlled Vocabulary in Primo VE, go to: Alma configuration > Discovery > Other > Customer Settings. Scroll down the table or use your browser's Find function to find the parameter key `use_controlled_vocabulary_search_expansion` and set the parameter value to true). Click the ... (ellipsis button) on the line and Customize to make the option editable.

## Controlled vocabulary setting in Alma configuration

Mapping Table

	parameter key	parameter module	parameter value	free text description	Managed in Netw
21	mendeley_secret	system		Mendeley authenticatio	
22	moazine_linking	system	http://dl.moazine.com/\	Authentication templat	
23	naxos_jazz_library	system	http://INSTITUTIONID.n	Template for Naxos Jaz	
24	naxos_music_library	system	http://INSTITUTIONID.n	Template for Naxos Mu	
25	naxos_spoken_word	system	http://INSTITUTIONID.n	Template for Naxos Spr	
26	naxos_video	system	http://INSTITUTIONID.n	Template for Naxos Vid	
27	nichigai_linking	system	https://web.nichigai.jp/i	Template for Nichigai A	
28	number_of_representations_i	system	5	How many representati	
29	online_payment_link	system	false	Display Online Payment	
30	psychotherapynet_video_link	system	http://www.psychothera	Template for Psychothe	
31	Syndetics_Unbound_Custom	system		Syndetics Unbound Cus	
32	use_controlled_vocabulary_s	system	true	Use Controlled Vocabul	
33	WestlawUK_linking	system	http://login.westlaw.co.	Template for WestlawUI	

More information can be found here:

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/120Other\\_Configurations/Discovery\\_Customer\\_Settings#SearchExpansion](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/120Other_Configurations/Discovery_Customer_Settings#SearchExpansion)

If you want to dig deeper on the sources of the suggestions, see:

[https://knowledge.exlibrisgroup.com/Primo/Community\\_Knowledge/How\\_to\\_%E2%80%93\\_Figure\\_out\\_which\\_search\\_terms\\_are\\_triggering\\_the\\_Controlled\\_Vocabulary\\_feature\\_in\\_Prime](https://knowledge.exlibrisgroup.com/Primo/Community_Knowledge/How_to_%E2%80%93_Figure_out_which_search_terms_are_triggering_the_Controlled_Vocabulary_feature_in_Prime)

### Personalize Feature

RVC: Anyone using the "personalize" feature shown in the training?

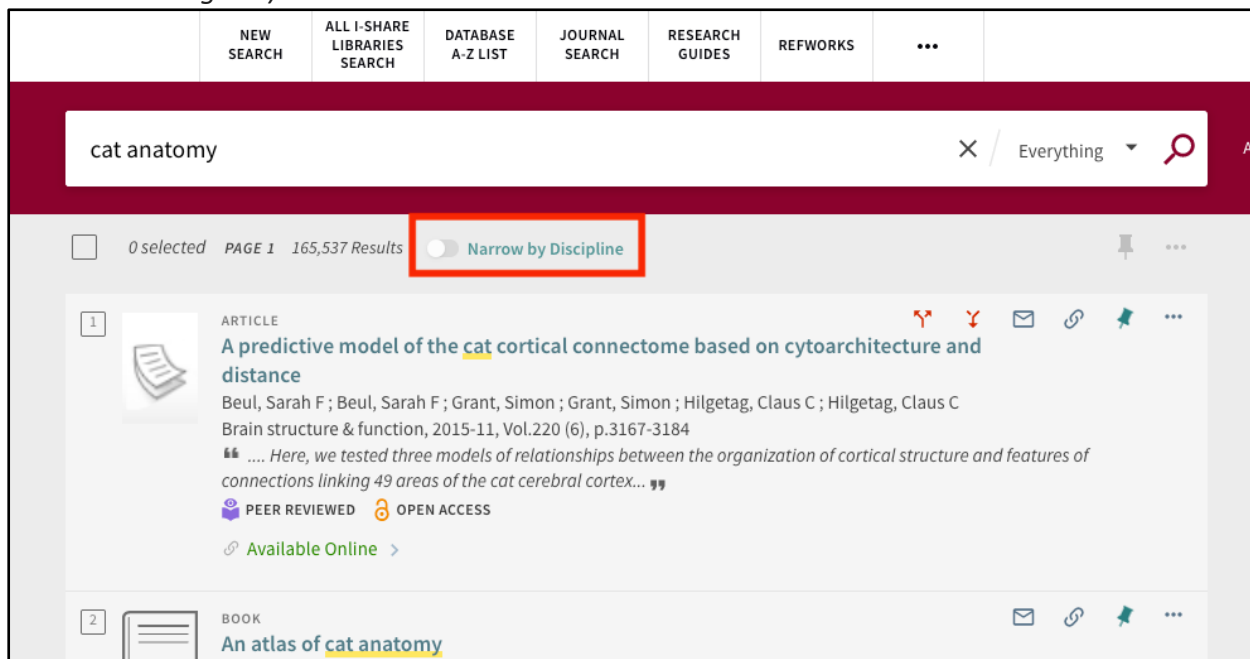
This is enabled/disabled in the View: Alma configuration > Discovery > Display Configuration > Configure Views > Edit the View > General tab > General Attributes section > "Enable the 'Personalize Your Results' service" check box.

The "Personalize Your Results" service is presented in search results when a Search Profile including the CDI was used.

TIU has turned it on and shown it off in a few instruction classes. It can be set by view if you have multiple views.

[LEW has it turned on in their Primo VE](#) , and it's called it "Narrow by Discipline" on the results pages. Their research librarians have been promoting it in their instruction sessions. They seem to use it a lot for their nursing students.

*Personalize/Narrow by Discipline Feature in Lewis University's Primo VE (on results pages after a search including CDI)*



The label for the service is "Personalize" by default but can be changed in Alma Configuration > Discovery > Display Configuration > Labels by finding and editing the code:  
nui.pyr.icon.label.interactive

### ILL Option in How to Get It

Can an I-Share institution set up an InterLibrary Loan (ILL) option in Expanded search?  
Jessica from CARLI: Yes. The ILL options are controlled by General Electronic Services (GES). GES are outside the scope of this particular session, but a link to more information about setting up GES for ILL services can be found on the CARLI website: [https://www.carli.illinois.edu/products-services/i-share/alma/ILL\\_GES](https://www.carli.illinois.edu/products-services/i-share/alma/ILL_GES)

Would a GES for ILL only work with ILLiad?

Denise from CARLI: No. Besides ILLiad and Tipasa, some I-Share libraries have set up using forms via LibWizard or a campus-designed form. They would still be set up as a GES similar to ILLiad.