

## Notes from the CARLI Primo VE – Become an Expert Discussion Section on “Search Interfaces” February 18, 2021

### Database Browse

There was general confusion about this feature and concern that the Ex Libris webinar presenter had described it as “fun” and “goes against best practices” for Alma management of electronic resources.

The feature appears to require a lot of setup and configuration upfront and overhead to maintain, and even when implemented is NOT an A-Z list.

Because Database Browse is not an A-Z list of databases, session attendees were queried as to how they are presenting their databases to users right now?

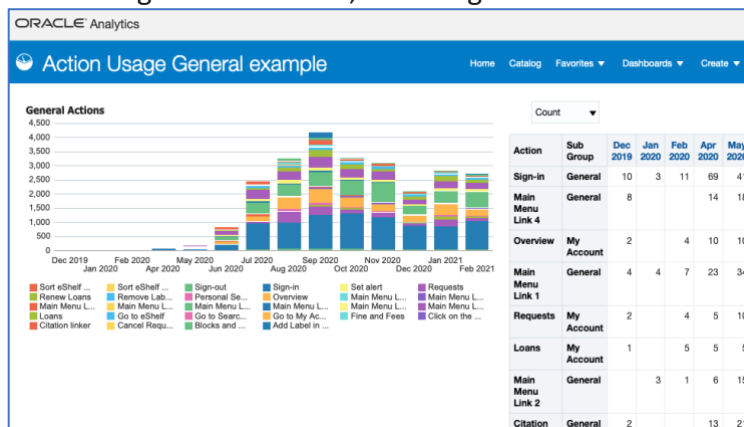
- LibGuides was a popular answer (MLS, GRN, TIU, USF, JOL, MON, UIS)
- External page on a website (QCY)

You can create a menu Link in Primo VE to go your external LibGuides/website page and several institutions have done this (JOL, UIS, DPU).

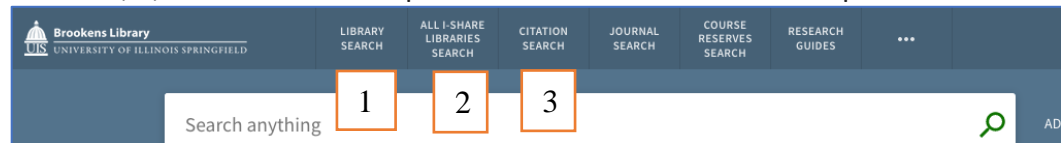
- UIS demonstrated their Primo VE instance. Go to [https://i-share-uis.primo.exlibrisgroup.com/discovery/search?vid=01CARLI\\_UIS:CARLI\\_UIS](https://i-share-uis.primo.exlibrisgroup.com/discovery/search?vid=01CARLI_UIS:CARLI_UIS) and then click on “Databases A-Z” from the Links menu.

UIS also demonstrated in Alma Analytics where to look for usage what users are searching on and which links menu links they are clicking on often. There are several out-of-the-box Example reports that you can view and get information from without having to know how to customize reports.

- You’ll need the "Design Analytics" role in Alma to access Primo Analytics
- In Alma, go to Analytics > Design Analytics (Primo) > choose Catalog from the top menu > in Folders (on the left) drill down to Shared Folders > Primo > Usage > Reports
  - Popular Searches example report – shows what users are searching for and might reveal topics that could benefit from a [Primo VE Resource Recommender](#) entry
  - Action Usage General example report – shows which features/functions users are clicking on in Primo VE, including the Main Menu Links.



- Note that in this report the Main Menu Links are labeled in this report as 1, 2, 3 etc which corresponds to their order across the top



- Primo VE Analytics documentation: [https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/140Primo\\_VE\\_Analytics](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/140Primo_VE_Analytics)

## Collections

Q: Anyone using collections as discussed in the Ex Libris webinar?

A: No one in session.

You don't need to use Alma-D or Rosetta to use Collections. For example, MIL is has created some Collections: [https://i-share-mil.primo.exlibrisgroup.com/discovery/collectionDiscovery?vid=01CARLI\\_MIL:CARLI\\_MIL](https://i-share-mil.primo.exlibrisgroup.com/discovery/collectionDiscovery?vid=01CARLI_MIL:CARLI_MIL)

[Alma Collections documentation](#)

[Primo VE Collections documentation](#)

[Managing Images in the Collection Lobby](#)

Q from RVC: Could Collections be used for a new books list?

A from CARLI: This seems technically possible, but it would take some manual curating since the collections are static--you'd need to add/remove the titles in the Collection.

Q from USF: Are the NILRC Overdrive books a collection?

A from CARLI: No, that is not this type of Collection. The Overdrive "collection"--just like the Oxford or Wiley titles--are in Alma as portfolios but the bibs aren't in a collection like the ones talked about in the session. We're not sure if setting up this kind of Alma/Primo VE Collection would work for the NILRC Overdrive books because of the NZ component, but it might be worth testing!

Q from GRN: Are Collections are good way to put individual eBook purchases into a group that can be browsed?

A from CARLI: It seems possible since the collection is made of bibliographic records.

DPU: We'd like to use Collections for our popular reading titles (and for others). University of California Irvine gave a presentation on how they set Collections up at a recent ALA Core presentation. They've done some neat things:

[https://uci.primo.exlibrisgroup.com/discovery/collectionDiscovery?vid=01CDL\\_IRV\\_INST:UCI](https://uci.primo.exlibrisgroup.com/discovery/collectionDiscovery?vid=01CDL_IRV_INST:UCI)

ALA Core Presentation done by UCI: [https://ala-](https://ala-events.zoom.us/rec/play/n0zBtPzAdM1zxEbqo648xd00vJRim9t99pJGVhR08Ad1bEySrwK9xtAPcK1JmKYxrMvk7G9dh-)

[events.zoom.us/rec/play/n0zBtPzAdM1zxEbqo648xd00vJRim9t99pJGVhR08Ad1bEySrwK9xtAPcK1JmKYxrMvk7G9dh-](https://ala-events.zoom.us/rec/play/n0zBtPzAdM1zxEbqo648xd00vJRim9t99pJGVhR08Ad1bEySrwK9xtAPcK1JmKYxrMvk7G9dh-)

[KBgV5E.daFsPzxULXqAk6Jz?startTime=1612540865000& x\\_zm\\_rtaid=XaPpprbCSAK2Ag7BLRSLIA.1613668330892.4012b166ff780866b3ab5a92c5318ba2& x\\_zm\\_rhtaid=206](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/050Managing_Collections#Working_with_Collections) (Second presentation in the video)

Q: Can Collection records be added as a batch?

A from CARLI: Yes, according to the ExL documentation:

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/050Inventory/050Managing\\_Collections#Working\\_with\\_Collections](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/050Managing_Collections#Working_with_Collections) - look under the "Managing Titles" section for more information about adding titles as a set.

### **Newspaper Search**

CARLI has had some institutions ask about setting up Newspaper Search. The Ex Libris presentation today went into far more detail than CARLI staff have looked into.

Q: Has anyone present tried setting it up?

- NCC has set it up though they are not sure if it's getting much use--needs to check that analytics report!
  - We looked together at [NCC's Primo VE](#).
  - The Newspaper Search option has been configured in the Links Menu.
  - NCC has also configured three "featured newspapers" that you see when you select the Newspaper Search.
  - After doing a search there, the results look pretty similar to any search but all results are newspaper articles.
- Documentation:
  - [Configuring Newspaper Search for Primo VE](#)
  - [Introduction and FAQ for Newspaper Search](#)

Q from USF: For the featured newspapers can you direct to a newspaper within a database?

A from CARLI: You could probably set up a featured newspaper specifically, but do you mean a specific newspaper within a database like the WSJ, for example? Used to subscribe independently but now they are all via databases. We're not sure if you can direct to the WSJ within a database, we'd need to do some testing.

LEW notes that it looks like it says it is set up with ISSN, so worth testing.

### **Resource Recommender**

We covered [Resource Recommender](#) a bit last week, but it looks really interesting to get certain or timely information to users since it pops up at the top of the page when they search for specific terms like 'library hours' as was demonstrated in the session.

### **Journal Search**

[Journal Search](#) is not an A-Z list, which is disappointing to many Primo VE-using institutions.

- If you'd like to Vote for the Idea Exchange idea to add an A-Z list to Primo VE, see: <https://ideas.exlibrisgroup.com/forums/308176-primo/suggestions/36909595-a-z-option-in-primo-ve-journal-search>

Is anyone using Journal Search?

- LEW: they are using it but think it's the ILL folks who might be using it most.
- JOL: use it but run into CZ holdings issues with it - reporting inaccurate holdings (discussed in the Alma Office Hours from last week). In terms of a search they use it similarly to what they used with SerialSolutions or EBSCO full text finder A-Z list. Works similarly for JOL - problem being the holding issues
- NCC: I like the journal search. I didn't really like EBSCO publication finder, but I seem to like the journal search in Primo VE.

### Tags

Q: Is anyone using Tags?

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/050Display\\_Configuration/060Managing\\_Tags\\_for\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/060Managing_Tags_for_Primo_VE)

A: Some institutions reported that they do have tags turned on:

- QCY has not figured out how they will use them
- USF didn't see much use for them in Voyager so they have not turned them on.
- JOL had tags in VuFind but they didn't get much use, though JOL never promoted them. Assume it would be similar in PVE.

DPU: UC-Irvine mentioned doing testing with tags and weren't as useful as they hoped and also had to watch them/delete/add/etc.