Notes from the CARLI Primo VE – Become an Expert Discussion Section on "Branding, CSS, and HTML" Customzation -- February 25, 2021
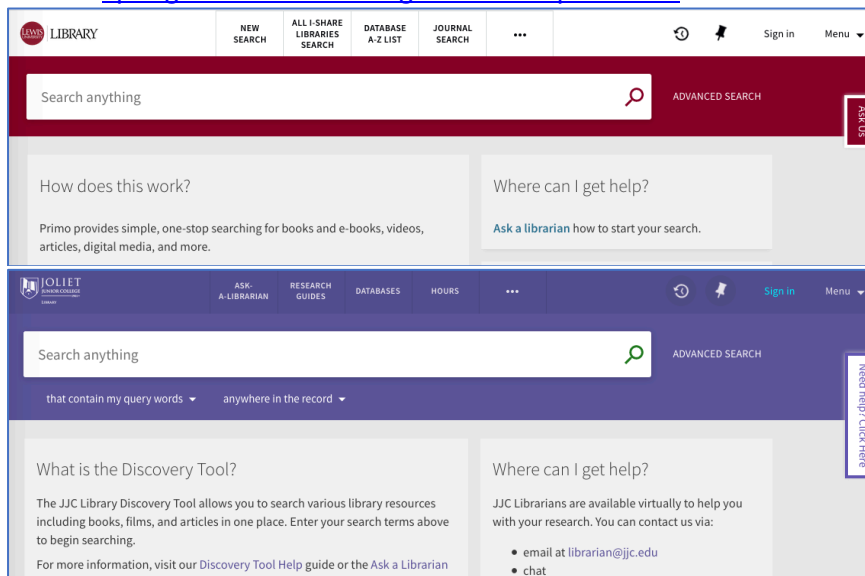
Add-on for New Books List?

RVC asked during the Ex Libris session if there was a Primo VE addon available in Primo Studio to create a new books list but did not receive an answer.
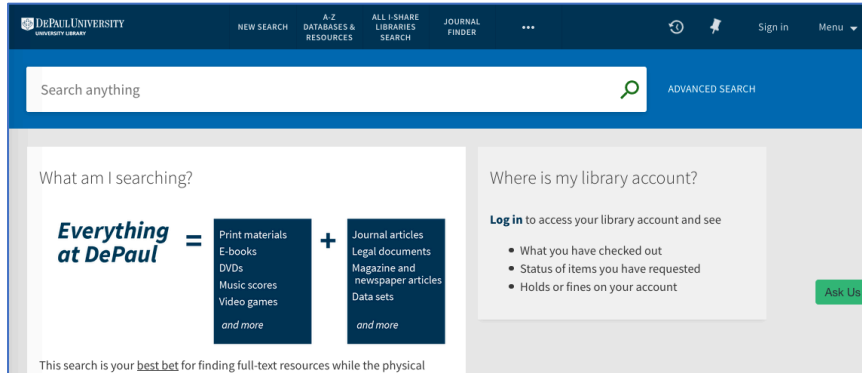CARLI: Ex Libris staff might not know since the addons are created by the community, non ExL staff. There isn't a list of addons, we think you just need to browse through them. Remember that addons that you add through Primo Studio may break after future changes to Primo VE and may require maintenance.
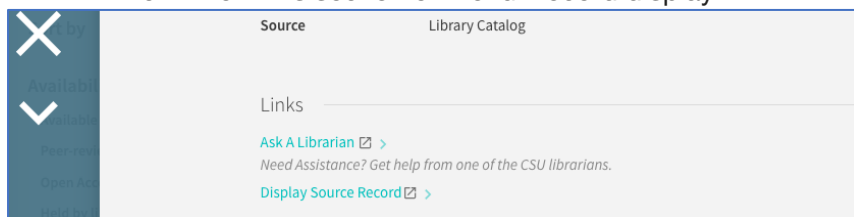
Ask-A-Librarian links

BHC asked if anyone has added a link for "Ask-a-Librarian" since they just got approval to purchase LibAnswers.
- CARLI: some institutions have added a general link as GES so it appears if there is a "view online" link.
- Several institutions have added the widget slide-out into the Customization Package. Examples pictured below: LEW, JOL, DPU
- JOL: Very easy to add the Libanswers pop-out. Just followed the instructions and it worked fine. With widgets you can choose if it pops up automatically after users have been on the page for awhile or can simply leave it on the side for people to use. Springshare has good documentation for setting up their widgets.
- Instructions can be found at https://developers.exlibrisgroup.com/blog/embedding-springshare-libchat-widget-into-the-primo-nu/

- **CSU** added a general help link called "Ask A Librarian" as GES and set it to display all the time in the Links section of the full record display.

LLC: Is the slide-out widget from LibGuides persistent page-to-page in PVE?
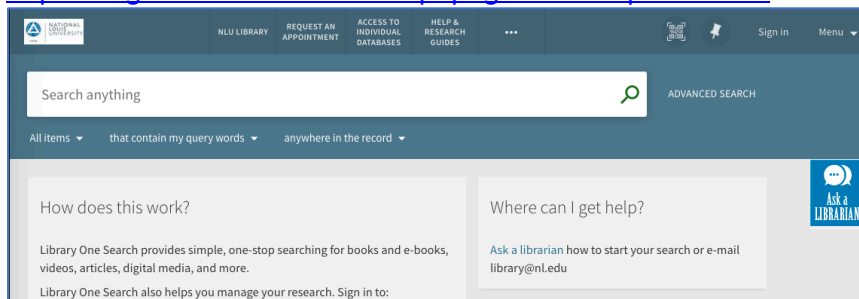JOL: Yes, it stays on each page.

Both LEW and NLU see lots of chats come through Primo VE.
MHC reported they aren't getting too many chats from Primo VE but their students don't really use it a lot.

RVC: They use LibraryH3lp - anyone know if they have a slide-out ask-a-librarian option?
NLU: Yes, they do and NLU has implemented it, but it did take a little work to get it running. See:
http://pamtest1.ask.libraryh3lp.com/questions/33711 and
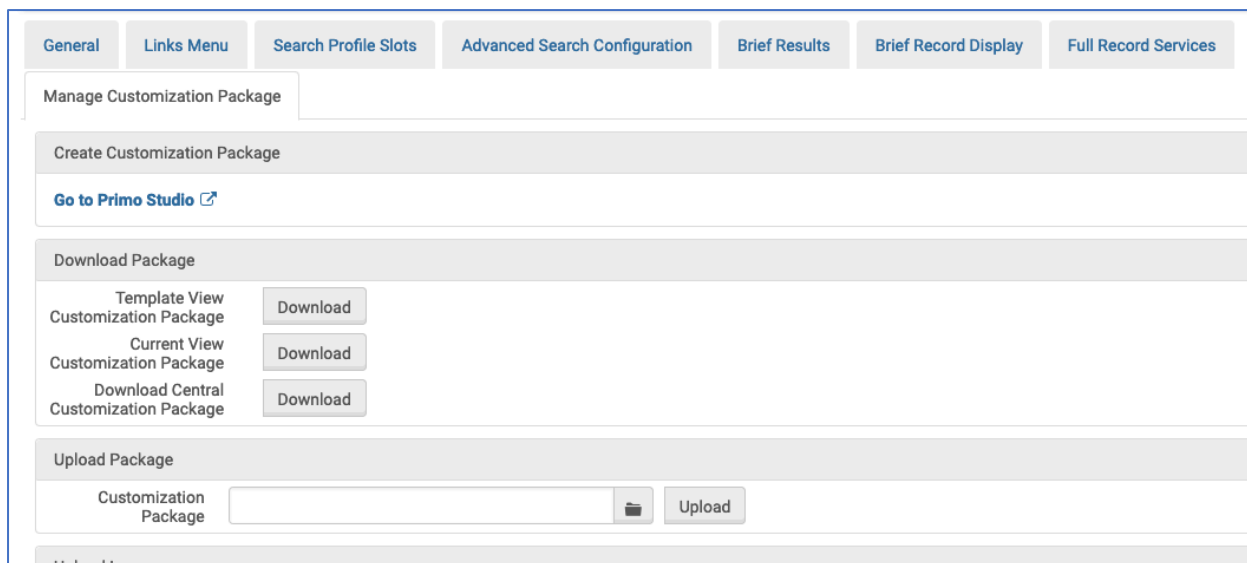https://libguides.colostate.edu/c.php?g=701450&p=7250258

Does H3lp's work on search results page? Yes.

LLC: Has anyone been able to make the LibChat floating widget work and remain persistent?
It seems to be persistently scrolling on the side in Primo VE but they'd rather that floats and stay at bottom of the page like their library homepage link rather than on the side. No one else appears to have done this.

General Information on the Customization Package

As discussed in the Ex Libris session, if you haven't done customizations in the View before, the first time you go to customize you need to use Template View Customization Package option to download. Once a customization package has been created and uploaded, the "Current View Customization Package" will then be available in Alma and you'll want to use that to make additional changes.

General	Links Menu	Search Profile Slots	Advanced Search Configuration	Brief Results	Brief Record Display	Full Record Services

Manage Customization Package

Create Customization Package

Go to Primo Studio ⬀

Download Package

Template View Customization Package	Download
Current View Customization Package	Download
Download Central Customization Package	Download

Upload Package

Customization Package	[ ] 📁 Upload

Upload Logo

Overall, you need only Discovery - Admin role to use Primo Studio and do customizations

HTML Cards on Primo VE page

KIS: Can we remove cards on Primo VE main page?
- CARLI: Yes, you can comment it out or remove it/edit by editing the html files as demonstrated in the Ex Libris session. You could even add more cards and change the layout, if desired. Using the Inspector function of your web browser, you can view the HTML code used at another institution.
- GRN reports that they copied AUG's because they liked what had been done.
- JOL likes NCC's and might borrow it.
- RVC removed a card from their page.
- ERK, IMS also made some changes.

JOL: I've been hoping to experiment more with what kinds of code it accepts. Like if it will take things like JS or PHP, etc. Can I embed fancier code like our dynamic hours box from LibCal, etc. Don't know if anyone has experimented with that?
- CARLI: Jessica showed some of the CARLI documentation on editing CSS and JavaScript. CARLI's pve-ig email list can be used for sharing your customization ideas, etc.
- LEW: Purdue University added a Twitter feed to their front page, so you can add widgets and videos on the page: https://purdue-primo-prod.hosted.exlibrisgroup.com/primo-explore/search?vid=PURDUE&lang=en_US
- MLS has LibGuides content on main page instead of using the cards at https://i-share-mls.primo.exlibrisgroup.com/discovery/search?vid=01CARLI_MLS:CARLI_MLS. After the

session, MLS kindly shared with CARLI how they set this up; see their instructions in this PDF.

Follow-up from Previous Sessions

Newspaper Search
LEW activated the Newspaper Search feature. They talked about it with the research librarians and found that ProQuest US News Stream wasn't accessible because Newspaper Search wasn't turned on. They also configured WSJ and Chicago Tribune as Featured Newspapers. JOL is working on it now.

Collections

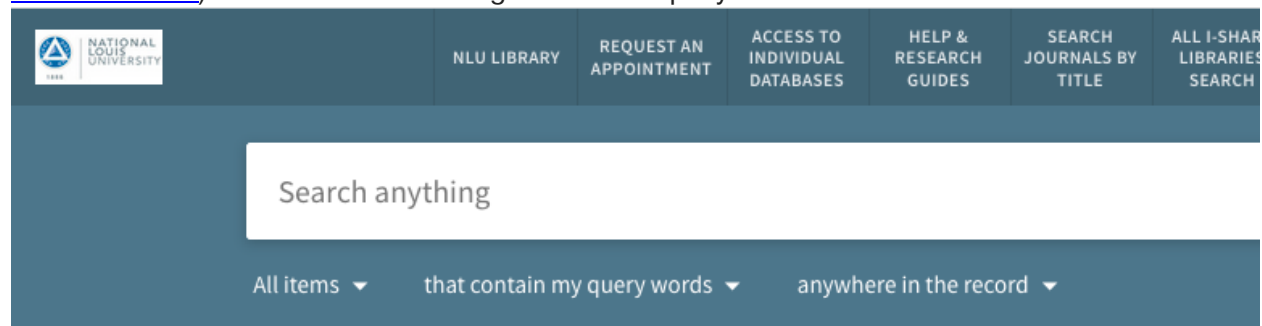RVC is now using the Collection discover option for New Books List.

JOL also playing around with the collection discovery option. We're planning to use the Collections for award winners and displays. You can have multiple levels of sub-collections which is nice, but I've got to be careful not to get too confusing with the too many levels.
CARLI: adding things to collections is more of a manual job, so very useful for things like exhibits, etc. Will need upkeep to keep content current for something like a new books list.

UIS offers a word of caution about Collections and Sub-Collections: when using sets, you can't move items around from one sub-collection to another (at least I haven't found a way)

Advanced Search options under the Basic Search box

NLU: Added advanced search dropdown options under the basic search box (called Pre-filters for basic searches) but would like to change the word "query" to "search".

To change this wording, edit this label:
Alma Configuration > Discovery > Display Configuration > Labels > Basic Search Pre-Filters Label > Code: search-simple.precisionOperator.option.contains
Description: that contain my query words

Miscellaneous

GRN: Can you push citations in Primo VE to Zotero?
CARLI: This seems to already be available. See: https://www.youtube.com/watch?v=cRYwhLevv-4&feature=youtu.be
and

https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE/0982018/0052018_Release_Notes_for_Primo_VE#Support_Save_To_Zotero

KIS: Do you have to have Syndetics Unbound in order to set up Collections in Primo VE?
CARLI: No, it is not a requirement for Collections.

- As an aside, CARLI is looking into Syndetics Unbound for libraries, which is the replacement to Syndetics Solutions, the previous product brokered by CARLI for libraries.
- Syndetics Unbound is the only one that works with Primo VE, but note that cover images are available in Primo VE by default without Syndetics Unbound.