



Welcome!

Office Hours will start at 2pm and run until 3pm.

Please mute your microphone.

As time permits, we will respond to questions typed in the chat box, and offline afterwards, as needed.

This session will be recorded and made available on the CARLI website both as PDF slides and as a recording, with live links to all referenced resources.





CARLI

ALMA PRIMO VE OPEN OFFICE HOURS
SEPTEMBER 8, 2022

PRIMO VE POTPOURRI

Agenda – 9/8/2022

Announcements and Reminders

Primo VE: Potpourri of Customizations

- Disclaimers and Reminders
- Feedback Tool
- Alphabetic Sort of Subjects in Full Record Display Details
- CDI Search Results Options
- Indexing of Holdings Metadata
- Quicklinks
- Location Order in Full Record Display's Get It Section
- Journal Coverage Dates in Brief Results
- Disable Edit Option in Personal Details of My Library Card
- Broaden "Not Available" status in Brief Results
- Display License Terms Information for E-Resources



I-Share Liaisons Webinar

Wednesday, September 14 from 3:00-4:00pm

Review the roles and responsibilities of I-Share Liaisons.
Attendance of I-Share Liaisons is encouraged but not required.

Register on CARLI website at:

<https://www.carli.illinois.edu/role-i-share-liaisons-webinar-0>

Session will be recorded.



Upcoming Office Hours

- Held on the 2nd Thursday of each month from 2:00-3:00pm
- Next session: October 13, 2022

Let's Talk About Fulfillment

- Held on some Fridays of each month from 2:00-3:30pm
- Next session on September 16

Technical Services Q&A

- Next session: Wednesday, September 21, from 2:00-3:00pm
- <https://go.illinois.edu/CARLItsqa> for past sessions

All event are on the [CARLI Calendar!](#)



Alma Electronic Resources

Be sure to update your electronic collections in your
Alma IZ

- Activate any new collections and subscriptions for patrons to get access
- Deactivate and delete collections if you no longer subscribe
- Update any authentication changes you have made



Primo VE Potpourri

Configurations, Settings, and Customizations
You Might Not Be Aware Of

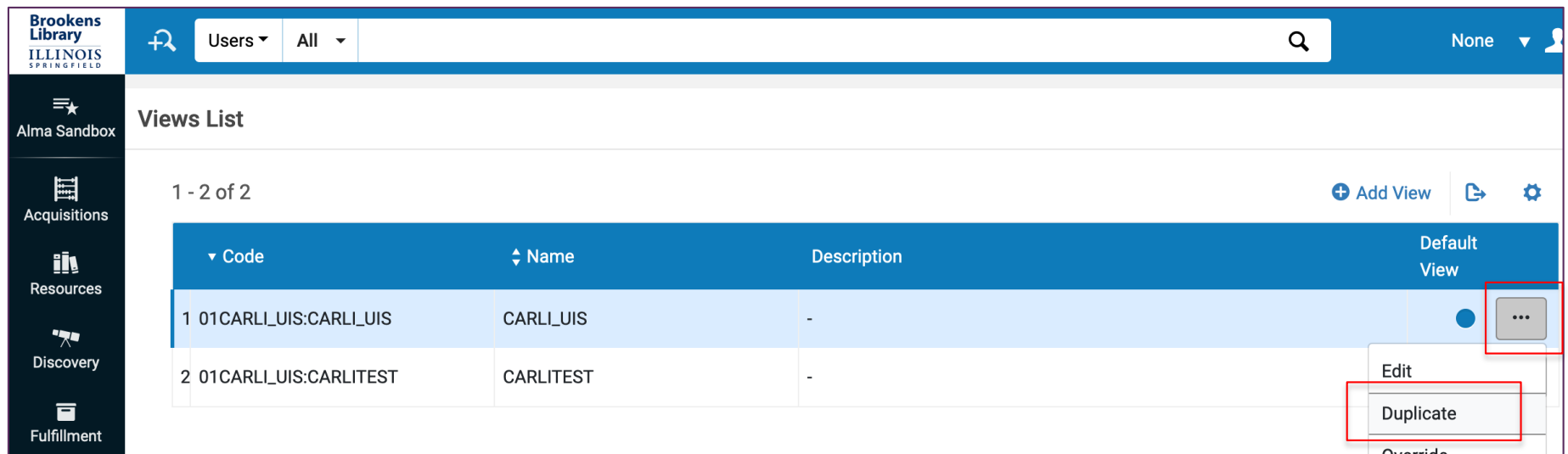


When making changes to configurations, settings, or customizations...

- Do not make changes without consulting with all stakeholders at your library.
- Keep a change log or record of what you change and the rationale behind it.
- When possible, test changes in one of the CARLI Sandboxes or in a TEST View of Primo VE first before making changes in production.*
- Save a copy of your old configuration package zip file! Alma contains only the current version.
- You'll need the *Discovery Admin* role to make most of these changes except where noted.



- Information on the Alma and Primo VE Sandboxes can be found at: <https://www.carli.illinois.edu/products-services/i-share/alma/sandbox>
- From the Primo VE Views list in Alma, you can Duplicate an existing View to make a new Test View:



The screenshot shows the Alma interface for the 'Views List'. The header includes the Brookens Library logo, a search bar, and navigation options. The main content area displays a table with two views. The first view is 'CARLI_UIS' and the second is 'CARLITEST'. A red box highlights the 'More' menu icon (three dots) for the first view, and another red box highlights the 'Duplicate' option in the dropdown menu.

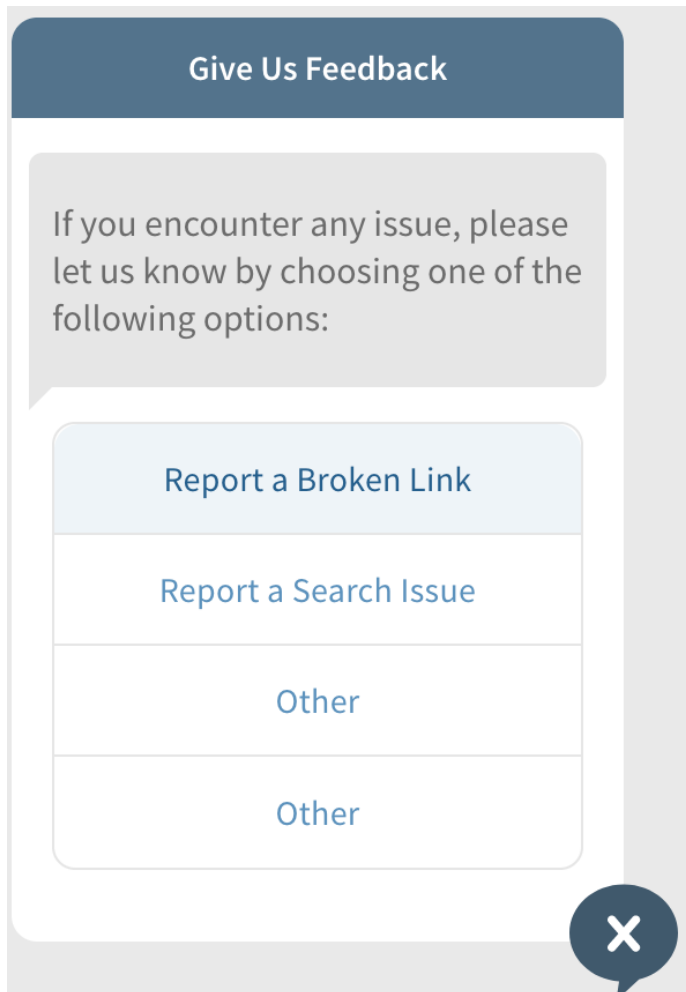
Code	Name	Description	Default View
1 01CARLI_UIS:CARLI_UIS	CARLI_UIS	-	<input checked="" type="radio"/>
2 01CARLI_UIS:CARLITEST	CARLITEST	-	<input type="radio"/>

Primo VE is moving to Angular 1.8 with the November 6, 2022 software release

- Upgrade may impact your JavaScript customizations in Primo VE and may require you to adjust the customizations prior to the upgrade to ensure a smooth migration to Angular 1.8.
- Ex Libris' Preparing for the Upgrade to Angular 1.8 website: https://knowledge.exlibrisgroup.com/Primo/Product_Materials/Announcements/Preparing_for_the_Upgrade_to_Angular_1.8_in_Primo%2F%2FPrimo_VE
 - Details on the changes, including webinar recordings
 - How to test your Primo VE NOW to identify any issues
 - How to adjust customizations, if needed
 - Frequently Asked Questions
- CARLI will test [our posted customizations](#) and send an announcement about any changes needed.



“GIVE US FEEDBACK” TOOL



Give Us Feedback

If you encounter any issue, please let us know by choosing one of the following options:

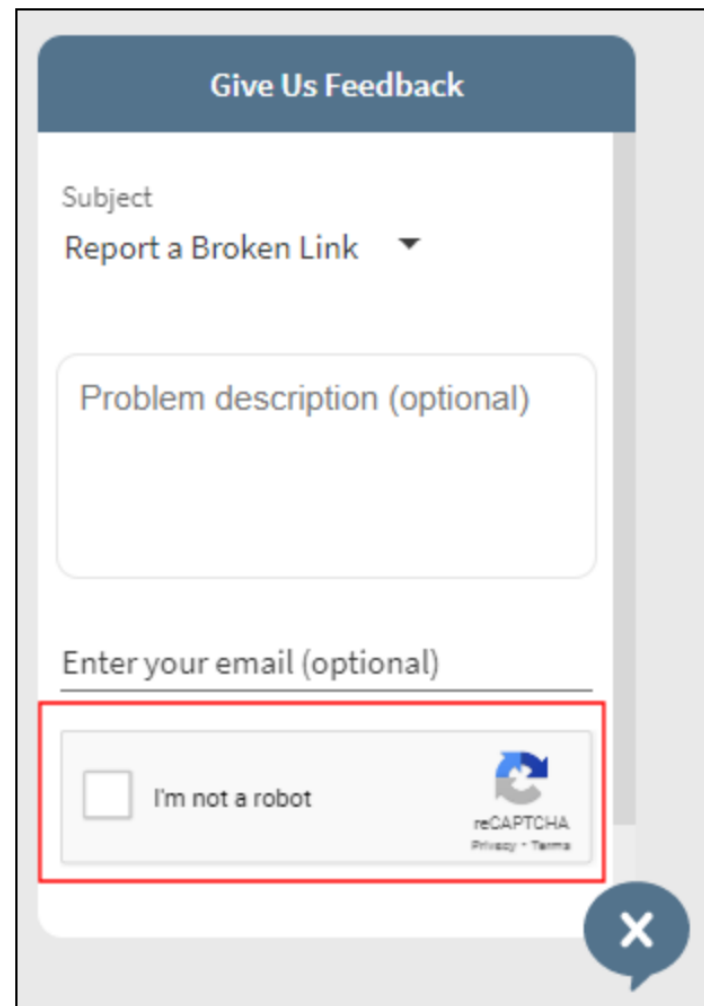
- Report a Broken Link
- Report a Search Issue
- Other
- Other

- New built-in widget allows libraries to receive feedback from users.
- Up to four categories to offer
- Appears in the lower right-hand corner of all pages.
- Configurable by Primo VE View.
- Sends email (Alma Letter) to one or more addresses.
 - Need Letter Admin or General Sys Admin role for Letters
- See it in action in the [KNX Sandbox CARLITEST View](#)

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/120Other_Configurations/Configuring_the_Feedback_Tool_for_Primo_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/120Other_Configurations/Configuring_the_Feedback_Tool_for_Primo_VE)

ADDING RECAPTCHA SECURITY TO EMAIL SENT FROM PRIMO VE

- Can add reCAPTCHA security to Email Action email and Feedback tool.
- Must register your institution (if you haven't already) and get keys from Google to input into Alma in the Captcha Keys mapping table (Alma Configuration > Discovery > Other > Captcha configuration)
- Labels are configurable



The image shows a screenshot of a 'Give Us Feedback' form. The form has a dark blue header with the text 'Give Us Feedback'. Below the header, there is a 'Subject' dropdown menu with the selected option 'Report a Broken Link'. Underneath is a text input field for 'Problem description (optional)'. Below that is another text input field for 'Enter your email (optional)'. At the bottom of the form, there is a reCAPTCHA widget, which is highlighted with a red rectangular box. The widget includes a checkbox labeled 'I'm not a robot' and the reCAPTCHA logo with links for 'Privacy' and 'Terms'. A blue circular button with a white 'X' is located in the bottom right corner of the form area.

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/120Other_Configurations/Getting_reCaptcha_Site_and_Secret_Keys](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/120Other_Configurations/Getting_reCaptcha_Site_and_Secret_Keys)

ALPHABETIC SORT OF SUBJECTS IN FULL RECORD DISPLAY DETAILS SECTION

Details	
Title	Merchant organization and maritime trade in the North Atlantic, 1660-1815
Creator	Janzen, Olaf Uwe, 1949- > International Maritime Economic History Association. > International Economic History Congress (12th : 1998 : Seville, Spain). >
Subject	Merchant marine -- History > Merchant marine -- North Atlantic Ocean -- History > Shipping -- North Atlantic Ocean -- History > North Atlantic Region -- Commerce -- History >
Genre	Merchant marine History Congresses.

Disabled (default)

Details	
Title	Merchant organization and maritime trade in the North Atlantic, 1660-1815
Creator	Janzen, Olaf Uwe, 1949- > International Maritime Economic History Association. > International Economic History Congress (12th : 1998 : Seville, Spain). >
Subject	Merchant marine -- History > Merchant marine -- North Atlantic Ocean -- History > North Atlantic Region -- Commerce -- History > Shipping -- North Atlantic Ocean -- History >
Genre	Merchant marine History Congresses.

Enabled

- Subjects display in the order they occur in the MARC record by default.
- This feature will alphabetize their display instead.
- Alma Configuration Menu > Discovery > Other > Customer Settings > **subjects_alphabetical_sort_fullDisplay** parameter to **true**

subjects_alphabetical_sort_fullDisplay	system	true	Defines whether to use alphabetic
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- Enabled in [UIS Sandbox](#)

Search Profiles define groups of records to be searched in Primo VE.

In a Primo VE Search Profile for the Central Index (CDI), or a *Blended* Search Profile that includes the Central Index (CDI) as one of the scopes, here are three options you may configure to affect search results:

1. Filter by Availability
2. Exclude CDI eBooks
3. Search in FT

Alma Configuration > Discovery > Search Configuration > Search Profiles

- All three are Enabled/Configured in [UIS Sandbox](#) “Articles” search scope.

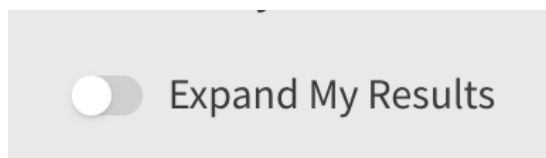


Filter by Availability

Code	Name	Description	<input checked="" type="checkbox"/> Filter by Availability	<input type="checkbox"/> Exclude CDI eBooks	All CDI resource types	All CDI disciplines	Search in FT: No (Always)	...
1	CentrallIndex	Central Index	All records within your Central Index profile					

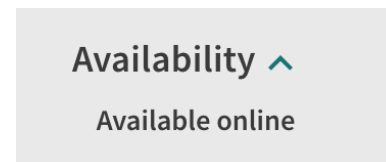
Check the “Filter by Availability” box if you want to display results of CDI records only if they have full text available.

- After performing a search, users may select the “Expand My Results” option from the facets to display other records for which your library does not have full text.




Uncheck the “Filter by Availability” box if you want to display all CDI records by default, including those without full text.

- After performing a search, users may select the “Available Online” facet to display only CDI records with full text.



FILTER BY AVAILABILITY IN CDI SEARCHES

 **Brookens Library**
UNIVERSITY OF ILLINOIS SPRINGFIELD

LIBRARY SEARCH | ALL I-SHARE LIBRARIES SEARCH | CITATION SEARCH | JOURNAL SEARCH | COURSE RESERVES SEARCH | RESEARCH GUIDES | ...


influenza in cats Articles ADVANCED SEARCH


Sign in to get complete results and to request items [Sign in](#) | [DISMISS](#)

0 selected **PAGE 1** 730 Results

Tweak your results

- Expand My Results
- Sort by Relevance
- Availability**
 - Available online
 - Peer-reviewed Journals
 - Open Access
- Subject

1  **ARTICLE** **Avian H5N1 influenza in cats**
Kuiken, T ; Rimmelzwaan, G ; Riel, D. van ; Amerongen, G. van ; Baars, M ; Fouchier, R ; Osterhaus, A
Science (American Association for the Advancement of Science), 2004, Vol.306 (5694), p.241-241
“ During the 2003 to 2004 outbreak of avian influenza A (H5N1) virus in Asia, there were anecdotal reports of fatal infection in domestic cats, although this species is considered resistant to influenza... ”
PEER REVIEWED
[Available Online](#)

2  **ARTICLE** **H5N1 avian influenza in cats. ABCD guidelines on prevention and management**



Exclude CDI eBooks

Code	Name	Description	<input type="checkbox"/> Filter by Availability	<input type="checkbox"/> Exclude CDI eBooks	All CDI resource types	All CDI disciplines	Search in FT: No (Always)	...
1	CentralIndex	Central Index	All records within your Central Index profile					

- Phase 1 introduced in November 2021
 - When checked, excluded ALL eBooks from CDI search results.
 - Many libraries found this unsatisfactory and did not enable it.
- Phase 2 introduced in August 2022
 - Now when checked, will exclude CDI eBook records only when there are active portfolios in active e-collections in Alma, thereby reducing duplicate results
 - Books from database collections continue to appear in results.
 - May not be appropriate if your library is using Rapido; check with Ex Libris Rapido Support before enabling.

Search in FT

Code	Name	Description	<input type="checkbox"/> Filter by Availability	<input type="checkbox"/> Exclude CDI eBooks	All CDI resource types	All CDI disciplines	Search in FT: No (Always)	⋮
CentralIndex	Central Index	All records within your Central Index profile						<div>Remove</div> <div>Edit Resource Type selection</div> <div>Edit Discipline selection</div> <div>Edit FT search configuration</div>

- “Search in FT” option is edited by clicking the ellipsis button and choosing “Edit FT search configuration”.
- By default, set to “No, Always”
- This setting will configure whether searches check indexed full text for matches on search terms, and whether or not users can override the setting themselves in Primo VE.

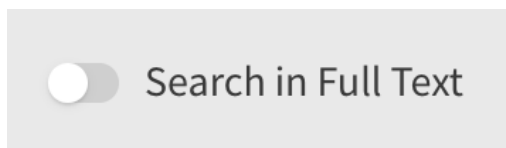
Define CDI Search Scope - Full Text Search

Search in FT:

- Yes, Always
- Yes, Per end-user selection
- No, Always
- No, Per end-user selection

Cancel Save

- **Yes** means results will include items if the search terms are not in the citation metadata but are in the full text of the document (and it is indexed).
- **No** means results will only include terms in the metadata.
- **Always** means no end-user option to enable/disable this choice.
- **Per end-user selection** will create a slider option in Primo VE for the user to toggle the Yes/No option themselves.



GIVE USERS ABILITY TO INCLUDE/EXCLUDE FULL TEXT MATCHES IN CDI SEARCHES

Here is an example with **No, Per end-user selection** chosen:

The screenshot displays the Brookens Library search interface. At the top, the search bar contains the query "influenza in cats" and the filter "Articles". The navigation menu includes options like "LIBRARY SEARCH", "ALL I-SHARE LIBRARIES SEARCH", "CITATION SEARCH", "JOURNAL SEARCH", "COURSE RESERVES SEARCH", and "RESEARCH GUIDES".

A yellow banner below the search bar prompts users to "Sign in to get complete results and to request items" with a "Sign in" button and a "DISMISS" option.

On the left side, under "Tweak your results", the "Search in Full Text" toggle is highlighted with a red box and is currently turned off. Other options include "Expand My Results" (turned on), "Sort by Relevance", "Availability" (with sub-options for "Available online", "Peer-reviewed Journals", and "Open Access"), and "Subject".

The search results show two articles:

- 1** **ARTICLE** **Avian H5N1 influenza in cats**
Kuiken, T ; Rimmelzwaan, G ; Riel, D. van ; Amerongen, G. van ; Baars, M ; Fouchier, R ; Osterhaus, A
Science (American Association for the Advancement of Science), 2004, Vol.306 (5694), p.241-241
“ During the 2003 to 2004 outbreak of avian influenza A (H5N1) virus in Asia, there were anecdotal reports of fatal infection in domestic cats, although this species is considered resistant to influenza... ”
PEER REVIEWED
Available Online >
- 2** **ARTICLE** **H5N1 avian influenza in cats. ABCD guidelines on prevention and management**

For more details on these three options go to:

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/040Search_Configurations/010Configuring_Search_Profiles_for_Primo_VE#Adding_a_Search_Profile](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/040Search_Configurations/010Configuring_Search_Profiles_for_Primo_VE#Adding_a_Search_Profile)

Scroll down to the chart titled “Valid Scope Types” and see the section on “Central Index”:

Central Index	<p>Includes records from CDI.</p> <p>Configure the following options:</p> <ul style="list-style-type: none">▪ Filter by Availability – Select the checkbox if you want to display only CDI records that have full text. After performing a search, users may select the Expand My Results option in Primo VE to display the other CDI records as well. <p>If you want to display all CDI records by default, clear the Filter by Availability checkbox. After performing a search, users may select the Full Text Online facet in Primo VE to display CDI records that only contain full text.</p> <ul style="list-style-type: none">▪ Exclude CDI eBooks – Select the checkbox if you prefer to use your own eBook catalog records (in your Primo local index) instead of the eBook records from CDI. If you use this option, all eBook records are filtered from the CDI results and users only see your eBook catalog records in blended searches. Chapter-level records are not affected and are still returned as part of the CDI results unless the Do not show as Full text in CDI even if active in Alma option for book collections during the CDI collection activation option is enabled for the electronic collection in Alma. <div data-bbox="388 1242 1906 1377" style="background-color: #ffffcc;"><p>Note</p><ul style="list-style-type: none">▪ If you are also using Rapido, this option should not be used.▪ When enabled, previously saved permalinks for CDI eBooks will no longer function.</div> <ul style="list-style-type: none">▪ Search in FT – Configure whether searches check full text for matches in CDI, and whether end users can override this setting in the UI:<ol style="list-style-type: none">a. Select the Edit FT search configuration row action to open the Define CDI Search Scope - Full Text Search dialog box:
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In addition to metadata in the bibliographic record, Primo VE now supports the indexing of holdings metadata so that users can search for holdings information in Primo VE.

1. Configure the holdings record fields in Alma.
2. Make sure your holdings records have the appropriate metadata in them.
3. Reindex the holdings records with the metadata (this is also accomplished by the semi-annual Primo VE reindex).

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/080Configuring_Delivery_Services_for_Primo_VE/Configuring_Holdings_Search_for_Primo_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/080Configuring_Delivery_Services_for_Primo_VE/Configuring_Holdings_Search_for_Primo_VE)



CDI Quicklinks feature embeds links to PDF and HTML full text directly into the Brief Displays in Primo VE.



- Available for 19 content providers: [Quicklinks Provider List](#)
- Alma Configuration > Discovery > Display Configuration > Configure Views > Edit View > General tab > check the box for Display Quick Links

Display Quick Links

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/030Primo_VE_User_Interface/Quicklinks_in_Primo_and_Primo_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/030Primo_VE_User_Interface/Quicklinks_in_Primo_and_Primo_VE)

Get It section of the Full Record page displays the physical locations that hold an item. If there are multiple locations, the Get It section lists the Locations in alphabetical order by default, without regard to which Library a location is in.

- New option for **Custom Libraries Order** per Primo VE View.
- The Brief Display availability statement will also display the preferred Library's locations first.
- For each prioritized Library, Alma further sorts the locations alphabetically and then by the number of available items, or by Location priority, if established.

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/050Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Get_It_Service](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Get_It_Service)



Example: Custom Order of Locations used by Wheaton College

WHE Buswell Library View

The screenshot shows the search results for 'major british writers' in the Buswell Library view. The search bar contains 'major british writers' and the location is set to 'Library Catalog'. The results show 166 results on page 1. The first result is 'Major British writers' by Harrison, G. B. (George Bagshawe), 1894-1991, editor, 1959. It is available at Buswell Library Books (Buswell Upper or Lower Level) (PR1109 .H35 1959) and other locations.

WHE Wade Center View

The screenshot shows the search results for 'major british writers' in the Wade Center view. The search bar contains 'major british writers' and the location is set to 'Wade Center'. The results show 13 results on page 1. The first result is 'Major British writers' by Harrison, G. B. (George Bagshawe), 1894-1991, editor, 1959. It is available at Wade Center Wade Center -- Remote C. S. Lewis Library (CSL Lib. PR1109 .H35 1959) and other locations.

The 'Get It' section shows the request options for 'major british writers'. The request is 'I-Share / Request Book Chapter through ILLiad'. The locations listed are:

- Buswell Library
Available, Books (Buswell Upper or Lower Level) ; PR1109 .H35 1959
Holdings: v. 1...
View more
- Wade Center
Available, Wade Center -- Remote C. S. Lewis Library ; CSL Lib. PR1109 .H35 1959
Holdings: v. 2
- Wade Center
Available, Wade Center -- Remote Stacks ; PR1109 .H35 1959
Holdings: v.1

The 'Get It' section shows the request options for 'major british writers'. The request is 'I-Share / Request Book Chapter through ILLiad'. The locations listed are:

- Wade Center
Available, Wade Center -- Remote C. S. Lewis Library ; CSL Lib. PR1109 .H35 1959
Holdings: v. 2
- Wade Center
Available, Wade Center -- Remote Stacks ; PR1109 .H35 1959
Holdings: v.1
- Buswell Library
Available, Books (Buswell Upper or Lower Level) ; PR1109 .H35 1959
Holdings: v. 1...
View more



SHOW JOURNAL COVERAGE DATES IN BRIEF RESULTS AND JOURNAL SEARCH

- For electronic journals managed in Alma, Primo VE can display a coverage summary by year which is taken from the portfolio in the Brief Results availability statement area.
- Can include up to three date ranges; if more there will be an “and more” label. Can include one embargo.
- Coverage is calculated in real-time, so may not display immediately.



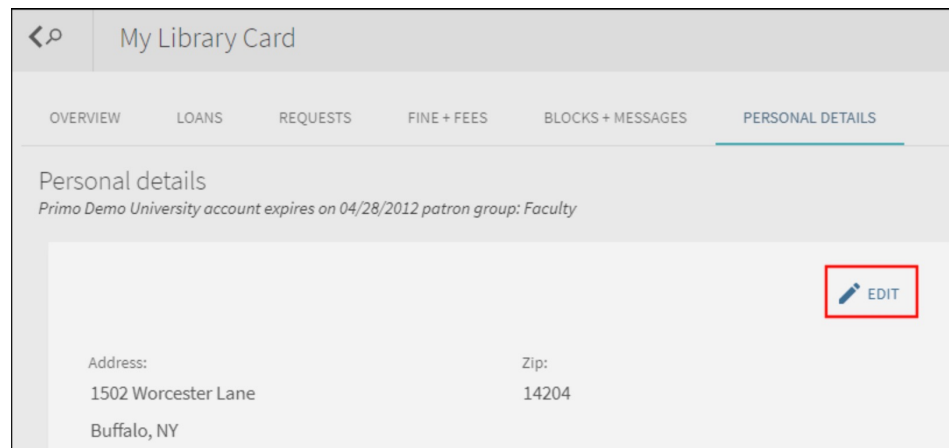
The screenshot displays two search results for the journal 'Health'. The first result is 'JOURNAL Health (San Francisco, Calif. : Online)' with the year '1992'. Below the title, the text 'Available Online (Coverage: 1992-2005, From 2010) >' is highlighted with a red box. The second result is 'JOURNAL Health' with the text 'Available Online (Coverage: 2001-2002, 2008-2009, 2010-2011 and more) >' highlighted with a red box. Both results include icons for linking, emailing, and bookmarking.

Alma Configuration > Discovery > Other > Customer Settings > set the parameter **brief_results_journal_coverage** to **true**

brief_results_journal_coverage	system	<input type="text" value="true"/>	brief results journal cove	-	-	...
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DISABLE EDIT OPTION IN PERSONAL DETAILS OF MY LIBRARY CARD

- In Primo VE My Library Card, there is an option to allow users to EDIT their personal information.
- Often these data come from campus/student information systems and cannot be modified by Primo VE.
- This option hides the EDIT button in My Library Card.



Alma Configuration > Discovery > Display Configuration > Configure Views > Edit the View > General tab > **clear the checkbox** for “Enable Edit My Library Card”

Enable Edit My Library Card

BROADEN “NOT AVAILABLE” STATUS IN BRIEF RESULTS

For any item that is not available, the item’s default Primo VE display label is only “Not Available”.

- For single-item records, setting can be enabled to broaden the “Not Available” statuses to provide more details such as Hold Shelf, Loan, Lost, In Process Missing, etc.
- Labels are customizable.

Alma Configuration > Discovery > Other > Customer Settings > set the **broaden_availability_status** parameter to **true**

broaden_availability_status	system	true	Use broaden availability :	-	-	...
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Result example: “Not available” becomes “Not available – Lost”



The screenshot shows a search result for the video "Harry Potter and the Order of the Phoenix". The title is "Harry Potter and the Order of the Phoenix" by Radcliffe, Daniel, 1989-; Watson, Emma, 1990-; Grint, Rupert, 1988-; Smith, Maggie, 1934-; Thomps... 2007. The status "Not available - Lost" is highlighted with a red box. The result also includes a video icon, a link icon, an email icon, and a pin icon.

Configured in [UIS Sandbox](#) and [KNX Sandbox](#)

If you have License Terms in your electronic resources in Alma, you can configure them to display in Primo VE in the View Online section.



Alma Configuration > Fulfillment* > Discovery Interface Display Logic > Other Settings > check box for Enable Display of License Information



* Requires General System Admin or Fulfillment Admin role

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/080Configuring_Delivery_Services_for_Primo_VE/Configuring_Discovery_Interface_Display_Logic_for_Primo_VE#Configuring_Miscellaneous_Display_Options](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/080Configuring_Delivery_Services_for_Primo_VE/Configuring_Discovery_Interface_Display_Logic_for_Primo_VE#Configuring_Miscellaneous_Display_Options)

YOUR QUESTIONS





**Join us October 13
at 2pm for another
Office Hour session.**

**Contact CARLI at
support@carli.illinois.edu**

POS1009070396, Missouri ironweed; Plants of SIUE (Southern Illinois University Edwardsville)
https://collections.carli.illinois.edu/digital/collection/sie_plants/id/223/rec/70

