

# Primo VE Pain Points

online documentation resources

CARLI Discovery Primo VE Committee  
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## General

Documentation for customizing Primo VE in general

- [Primo VE Resources](#) (CARLI)
- [Primo VE Customizations: Getting Started for CARLI I-Share Institutions](#) (CARLI)
  - [Configuring the User Interface](#) videos (Ex Libris)
  - [Primo VE Certification Videos](#) (Ex Libris)
- [Knowledge Center Primo VE Documentation Page](#) (Ex Libris)
- [Configuring Discovery Views for Primo VE](#) (Ex Libris)

Analytics

- [Primo VE Analytics 101](#) (CARLI)

## Key Terms

- **Search Scope:** Limit searches by library metadata, e.g. by resource type or availability. Custom local scopes can be defined.
  - see [Add I-Share Results to "Everything" Search in Primo VE](#) (CARLI)
  - in [Configuring Search Profiles](#) (Ex Libris), see:
    - [Defining a Local Data Scope](#)
    - [Defining a Scope for a Third-Party Index](#)
  - see “Valid Scope Types” in [Adding a Search Profile](#) (Ex Libris)
- **Search Profile:** Group records for users to search within, e.g. by location or resource type. Depends on Search Scopes.
  - see [Configuring Search Profiles](#) (Ex Libris)
    - information on defining Search Profiles in Alma
  - see [Become an Expert: Search Configuration](#) video (Ex Libris)
- **Search Profile Slot:** Primo VE facility for user access to Search Profiles. Depends on Search Profiles.

- see Customize [Search Profile Slots Tab](#) (CARLI)
- see [Configuring Search Profile Slots](#) (Ex Libris)
- **Label:** Names for Primo interface elements, which can be customized in Alma.
  - see [Example of Labels that I-Share Institutions Have Changed](#) (CARLI)
  - see [Customizing Primo VE Labels](#) (CARLI)
  - see [How to Determine a Label's Code Using Your Web Browser](#) (CARLI)
  - see [Configuring Display Labels for Primo VE](#) (Ex Libris)

## Pain Points

### #1: Search Targets

- Update Search Box
  - see [Create Primo VE Search Boxes for your Website](#) (CARLI)
- Re-label **Combined Search** to **Everything** and expand target to include I-Share
  - see [How to Determine a Label's Code Using Your Web Browser](#) (CARLI)
  - see [Add I-Share Results to "Everything" Search in Primo VE](#) (CARLI)
    - 'The "Everything" search slot... does not include results from other I-Share institutions or CARLI-activated resources in the [Network Zone].'
- Make **Everything** the default, instead of **Library Catalog**
  - see [Ordering Search Profile Slots](#) (Ex Libris)
- Re-label **Articles** to **Journal Articles** and limit CDI scope
  - see [Customizing Primo VE Labels](#) (CARLI)
  - see [Changing Labels](#) (CARLI)
  - see [Configuring Display Labels for Primo VE](#) (Ex Libris)
- EBSCO databases are not included in **Everything** searches
  - see [See Primo VE and the EBSCO E-Collections](#) (CARLI), e.g.:
    - [How to update EBSCO API database codes](#)
    - [How to toggle on/off the EBSCO API search profile slot](#)

### #2: Availability of Individual Items

- [I-Share Display Logic Rules Recipes for Requesting in Primo VE](#) (CARLI)
  - e.g. to hide the I-Share request link...
    - ...when there are electronic full text versions of the resource
    - ...and show only the local Request link
    - ...when the local item is not available to request

- ...if there are no copies available in I-Share
- [Primo VE Delivery Services](#) (Ex Libris)
- [Configuring the Display of Availability Labels for Holdings](#) (Ex Libris)
  - To configure the display text, translations, and the order of the availability labels for holdings in Get It.
- Get It
  - see [Configuring the Full Display Page](#) (Ex Libris)
    - especially: [Configuring the Get It service](#) (Ex Libris)
- Request forms
  - [Primo VE Resource Sharing Request Form](#) (CARLI)
  - [Configuring Request Forms for Primo VE](#) (Ex Libris)
    - Alma enables users to fill out various request forms so that they can provide additional information when requesting an item with the Full Display or Services page in Primo VE.
- potential “Request item” Issues
  - See documentation and webinar re: [I-Share Resource Sharing Requesting “Availability” Options](#) (CARLI), to address known issues:
    - The I-Share request link in Primo VE may display when there are no holdings at other institutions
    - Primo VE accepts requests for non-requestable material

### #3: Saving/Sending Options

- Configure Views → Brief Record Display
  - see [Configuring the Brief Record Display](#) (Ex Libris)
  - see [Configuring the Actions on the Display Pages](#) (Ex Libris)