Welcome to the webinar!

CARLI AND PRIMO VE

Jessica Gibson, CARLI

Your microphones are muted. Please turn off your video.

Most questions will be answered after each presentation.

Please type any questions into the chat box. Planning committee members are monitoring the chat.

This session will be recorded and made available on the CARLI website.

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CARLI AND PRIMO VE

Jessica Gibson

Goals of this session:

- Learn about some basic Primo VE functionality in the I-Share consortial environment

- Understand general options for Primo VE customization

- Know where to find documentation on Primo VE customization and functionality

- Each I-Share institution has a local instance of Alma known as your **Institution Zone** (IZ)
  - Contains your institution's data
  - Each I-Share institution has a local instance of Primo VE that can search more than just the IZ
- Consortial instance of Alma known as the **Network Zone** (NZ)
  - Is a central repository of shared bibliographic data
  - Allows for central management of some services
  - Distributes consortial configurations
  - Is not a union catalog

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I-Share

- Each Primo VE instance was delivered with a set of default Search Profiles and Slots.

- Search Profiles define which records can be searched.

- Search Profile Slots allow the user to choose what to search.

- Your institution may create new Search Profiles and Slots.
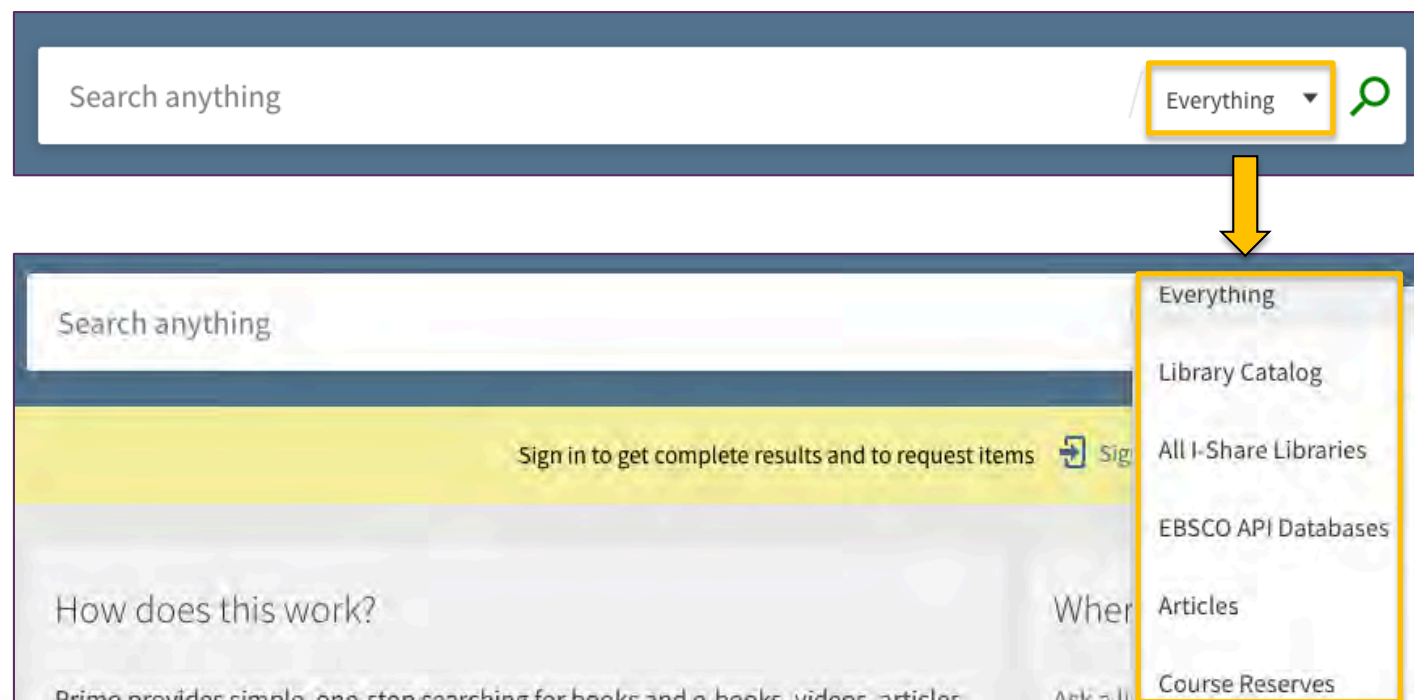
Search Profile Slot	Definition	Rename/Toggle?
Everything	Your IZ and your activated resources in CDI	Yes
Library Catalog	All physical/print and electronic records in your IZ	Yes
Articles	Your institution's activated resources in CDI	Yes
All I-Share Libraries	All physical/print and electronic records in your IZ; all physical/print records in NZ; all physical/print records in other I-Share IZs	No
EBSCO API	EBSCO's API search	Yes
WorldCat API	WorldCat API search	Yes
Course Reserves	Your IZ Course Reserves	Yes

IZ = Institution Zone
CDI = Central Discovery Index
NZ = CARLI Network Zone

CARLI I-Share

When you see "versions found" in the results list, this indicates that Primo VE's Dedup and FRBR Processes have been invoked for these records.

The Institution facet and the "Get It From Other Institutions" section can give users access to holdings at other I-Share institutions, even when doing a Library Catalog search.

☑ As of April 1, CARLI has completed implementing consortial defaults for Request form content:

- Removed Articles option
- Added fields for "Volume" and "Not Needed After"
- Removed fields for "Pages to Photocopy" and "Alternative Location Email"

❑ In progress: CARLI staff are working with Ex Libris on consortial defaults for Display Logic Rules which govern when the Request link and/or I-Share links should be presented to users.

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- Ongoing processes that can affect search results
    - Changes in Alma IZ are reflected in Primo VE in 15 minutes
    - Bibliographic data changes to records in the NZ
    - Data changes in the Community Zone (CZ)
        - CZ is a shared repository for all Ex Libris Alma users of authority records, bibliographic metadata, and electronic materials.
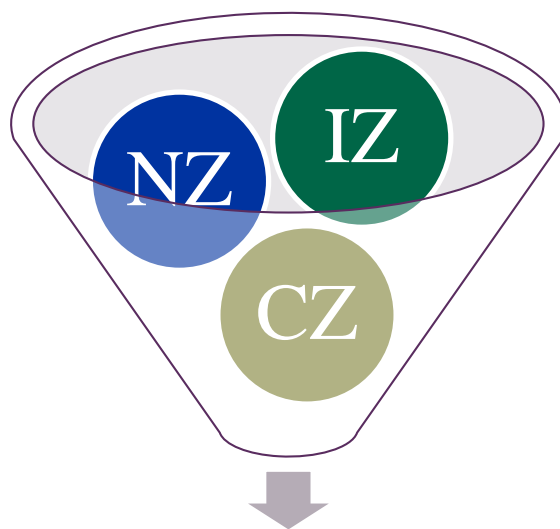
- Links into Primo VE
  - Permalinks to individual records will change; DO NOT copy now during Test Phase. Wait until after "go live".
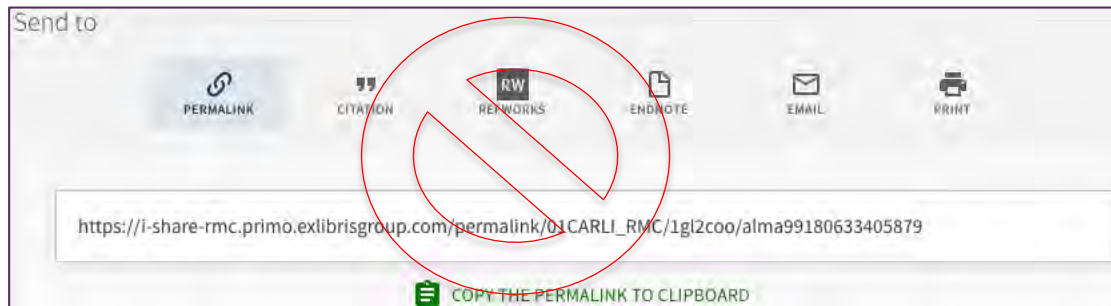
  - However, URLs for searches will persist; ok to copy now.
    - Do search in Primo VE and apply any facets you desire.
    - Once you are retrieving the search results you like, copy the URL.

https://i-share-lcc.primo.exlibrisgroup.com/discovery/search?query=sub,contains,child%20psychology,AND&tab=LibraryCatalog&search_scope=MyInstitution&vid=01CARLI_LCC:CARLI_LCC&facet=rtype,include,books&mode=advanced&offset=0
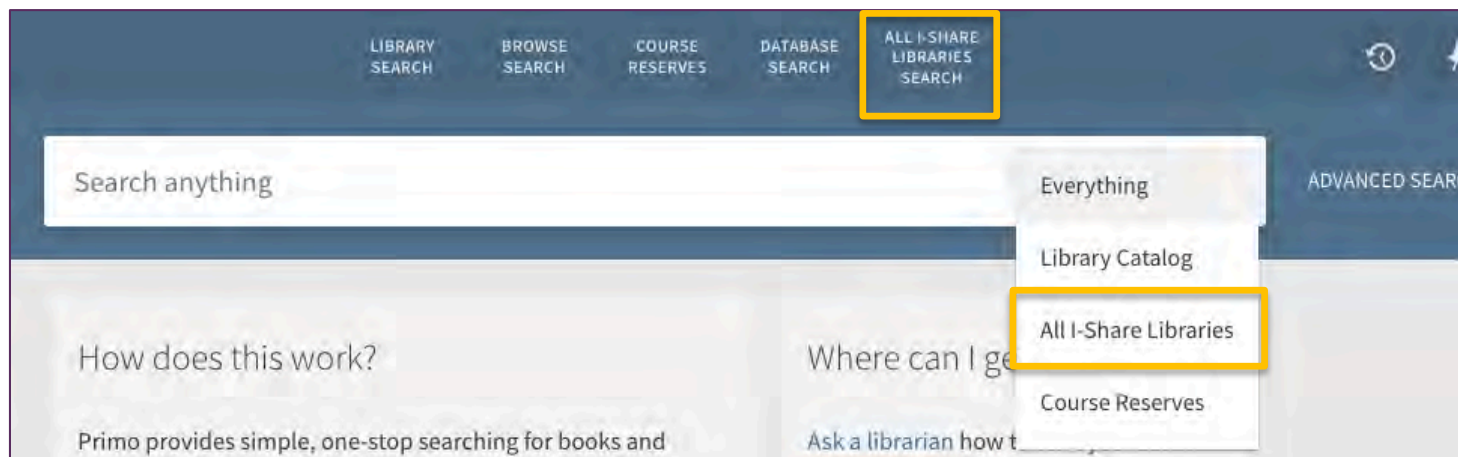
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Primo VE Customizations

CARLI's Primo VE Resources page:

- Getting Started for CARLI I-Share Institutions
- View Configuration Tabs
- Frequently Asked Questions (FAQs)
- Primo VE default display fields
- Primo VE and EBSCO Databases
- Ex Libris Documentation, Training Videos, and Information
- Ex Libris Knowledge Center Primo VE Training

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CARLI Requirements for your Primo VE

- Do not alter the configuration of the "All I-Share Libraries" Search Profile Slot

- Add a Link Menu item for "All I-Share Libraries Search" to the menu

DISCOVERY NETWORK SETTINGS SECTION

Discovery network settings

Display locations from member institutions ☑ **CARLI Recommends checked**

Include member institution physical inventory in facets ○ Never ● Only in cross institution search ○ Always **CARLI Recommends "Only in cross institution search"**

Library Facet ● Do not display member libraries ○ Display member libraries separately **CARLI Recommends "Do not display member libraries"**

○ Display member libraries with my institution libraries

1. Display locations from member institutions – CARLI Recommends checked. Controls whether or not other institutions' holdings will display in the GETIT OTHER section (CARLI have a recommendation to rename this section in future) in the full record display of your Library Catalog search results.

2. Include member institution physical inventory in facets – CARLI Recommends "Never" be chosen. (NEW April 1, 2020). Controls behavior of the top level Availability facet "Held by library:"

- **Never – CARLI Recommended.** Show *physical* items in the IZ (my institution) only. Disables the Library Facet configuration option below it on this page.
- **Only in cross institution search** – When doing All I-Share Libraries search, show *physical* items in the IZ (my institution) and *physical* items in any institution across consortium.
- **Always** – Show any *physical* items in the entire network.

3. Library Facet. Controls behavior of the Library or Other Libraries facets on the search results page; disabled if you chose "Never" as the option above; available if you chose "Only in cross institution search" or "Always" options above.

- **Do not display member libraries - CARLI Recommended.** Will not display other institutions' libraries in the Library facet and Other Libraries facet. The Institution facet will still provide access to other institutions' holdings.
- **Display member libraries separately** - See the other members libraries listed in a separate facet called "Other Libraries." This setting is not recommended for I-Share because the names of other institutions' Alma Libraries are listed and may not include the institution name.
- **Display member libraries with my institution libraries** - See other member libraries blended in a single list with my own libraries in the "Library" facet. This setting is not recommended for I-Share because the names of other institutions' Alma Libraries are listed and may not include the institution name.

A section from CARLI's Primo VE View Configuration Tabs page shows CARLI Recommendations in blue.

Customize, but verify!

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Academic and Research
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Please type your questions into the chat box.

This session has been recorded and will soon be available on the CARLI website.

Next session:

Primo VE & the Automated Fulfillment Network (AFN): A Demonstration

will begin at 11:20 AM