

\_01ODIN\_GLRC\_Primo\_VE\_questions.txt

General documentation: "Display Configuration"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/025Display\\_Configuration](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration)

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE)

1.) Do the links in the Main Menu appear correctly and link to the desired web pages?

- Collection Discovery links to a blank page
- Nothing comes up with the Collections and the Database Search

The Collection Discovery page is blank because no collections have been defined in Alma. A Collection (unrelated to an electronic collection) is an entity that aggregates bibliographic records that have a relationship of some kind. Collections are managed on the Top Level Collections page (Resources > Manage Inventory > Manage Collections). If you are not currently using the Collection functionality, the link can be turned off in Discovery Configuration.

Discovery Configuration > Display Configuration > Configure Views > Code: [View Code] > Edit "Links Menu" tab >

disable the entry for "CollectionDiscovery"

The Database Search page allows users to search specifically for databases in Alma. But many institutions suppress the Alma database record, so these records are then not retrievable in Primo VE Database Search box or other searches. If you want the base Database record to be searchable in Primo VE, then the Alma database record must be unsuppressed. If you prefer to remove the Database Search link from the Main Menu, then you need to disable the "DatabaseSearch" entry in the Discovery Configuration "Links Menu" tab.

Documentation: "Managing Collections"

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/050Inventory/050Managing\\_Collections](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/050Managing_Collections)

Documentation: "Configuring Discovery Views for Primo VE" - "Configuring the Links Menu"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/025Display\\_Configuration/010Configuring\\_Discovery\\_Views\\_for\\_Primo\\_VE#Configuring\\_the\\_Links\\_Menu](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Links_Menu)

Documentation: "Configuring Database Search for Primo VE"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/055Configuring\\_Advanced\\_Search\\_Interfaces\\_for\\_Primo\\_VE/Configuring\\_Database\\_Search\\_for\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/055Configuring_Advanced_Search_Interfaces_for_Primo_VE/Configuring_Database_Search_for_Primo_VE)

2.) Is the browse search configured correctly (if applicable)? Need to include additional call # schemes - only LOC shows up now

You can specify which of the following types of Browse additional Call Number schemes are offered to users: Call Number types ('callnumber.0' - Library of Congress, 'callnumber.1' - Dewey, 'callnumber.2' - NLM, 'callnumber.3' - SUDOC, 'callnumber.4' - Shelving control number, 'callnumber.UDC' - UDC, and 'callnumber' - generic call number).

Discovery Configuration > Display Configuration > Configure Views > Code: [View Code] > Edit

"Links Menu" tab > entry "BrowseSearch" > Edit

Enable the preferred Call Number browse lists.

Documentation: "Configuring Browse Search for Primo VE" - "Configuration Options"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/055Configuring\\_Advanced\\_Search\\_Interfaces\\_for\\_Primo\\_VE/Configuring\\_Browse\\_Search\\_for\\_Primo\\_VE#Configuration\\_Options](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/055Configuring_Advanced_Search_Interfaces_for_Primo_VE/Configuring_Browse_Search_for_Primo_VE#Configuration_Options)

Element: Links Menu tab in View Configuration

Description: In addition, you can specify which of the following types of Browse types are offered to users: Author, Title, Call Number types (callnumber.0 - Library of Congress, callnumber.1 - Dewey, callnumber.2 - NLM, callnumber.3 - SUDOC, callnumber.4 - Shelving control number, callnumber.UDC - UDC, and callnumber - generic call number).

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<https://3.basecamp.com/3765443/buckets/14394235/uploads/2423980710>

slide 35 = "Browse Search – Configuration Options"

Request other available call number browse lists turned on

By Dewey call numbers (where call number indicator is '1')

By SUDOC call numbers (where call number indicator is '3')

By call number (where call number indicator is <blank>, <missing> or '8')

3.) Are you able to search Central Index records? Added '&searchCDI=true' to end of URL before search but permalink does not show CDI anywhere

a. Use your Primo VE UI with '&searchCDI=true' appended to the end of the URL:

Example (but substitute your institutions View URL):

[https://xxx.primo.exlibrisgroup.com/discovery/search?vid=01ODIN\\_XXX:xxx&searchCDI=true](https://xxx.primo.exlibrisgroup.com/discovery/search?vid=01ODIN_XXX:xxx&searchCDI=true)

b. Search the term "history" In either the 'Everything' or 'Articles' search scope. Select a non-Alma result and then open up it's Permalink. I found an example of one which includes 'cdi\_' in the Permalink.

[https://xxx.primo.exlibrisgroup.com/permalink/01ODIN\\_XXX/1mvsans/cdi\\_pubmedcentral\\_primary\\_oai\\_pubmedcentral\\_nih\\_gov\\_4373556](https://xxx.primo.exlibrisgroup.com/permalink/01ODIN_XXX/1mvsans/cdi_pubmedcentral_primary_oai_pubmedcentral_nih_gov_4373556)

Note for example: You can find CDI 'Journal' records if you search the 'Articles' search scope and select Resource Type of Journals.

Important note: Make sure you are appending '&searchCDI=true' and not just '&search=true'

Documentation: "Your Move to CDI" - "Step 2: Check Your Activations" & "Step 3: Check Out the User Experience"

[https://knowledge.exlibrisgroup.com/Primo/Content\\_Corner/Central\\_Discovery\\_Index/Documentation\\_and\\_Training/020Your\\_Move\\_to\\_CDI/010Your\\_Move\\_to\\_CDI\\_-\\_Getting\\_Started#Step\\_2:\\_Check\\_Your\\_Activations](https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/020Your_Move_to_CDI/010Your_Move_to_CDI_-_Getting_Started#Step_2:_Check_Your_Activations)

4.) Are your institution's available electronic resources reflected accurately in CDI?

a. Use your Primo VE UI with '&searchCDI=true' appended to the end of the URL:

Example (but substitute your institutions View URL):

[https://xxx.primo.exlibrisgroup.com/discovery/search?vid=01ODIN\\_XXX:xxx&searchCDI=true](https://xxx.primo.exlibrisgroup.com/discovery/search?vid=01ODIN_XXX:xxx&searchCDI=true)

5.) Are Basic and Advanced search boxes configured correctly (search profiles etc.)? Primo VE does not open in advanced search

On the Primo VE landing page, you can look to the right of the basic search box for the "Advanced Search" link, which will take you to the Advanced Search page. Alternatively, you can add '&mode=advanced' to the end of the Primo VE URL:

a. Use your Primo VE UI with '&mode=advanced' appended to the end of the URL:

Example (but substitute your institutions View URL):

[https://xxx.primo.exlibrisgroup.com/discovery/search?vid=01ODIN\\_XXX:xxx&mode=advanced](https://xxx.primo.exlibrisgroup.com/discovery/search?vid=01ODIN_XXX:xxx&mode=advanced)

Important note: If you plan to use the above URL in the Discovery Configuration "Links Menu" as a Main Menu link, then the embedded ':' (colon) character in your URL will be problematic and force it to default the regular Discovery URL. Using character encoding from the reference page shown below, they can change the ':' (colon) to '%3A' and the adjusted URL should work ok in their Main Menu Link.

"HTML URL Encoding Reference" for encoding translations

[https://www.w3schools.com/tags/ref\\_urlencode.asp](https://www.w3schools.com/tags/ref_urlencode.asp)

Change this:

[https://xxx.primo.exlibrisgroup.com/discovery/search?vid=01ODIN\\_XXX:xxx&mode=advanced](https://xxx.primo.exlibrisgroup.com/discovery/search?vid=01ODIN_XXX:xxx&mode=advanced)

To this (replacing ':' (colon) with '%3A') for use in the "Links Menu":

[https://xxx.primo.exlibrisgroup.com/discovery/search?vid=01ODIN\\_XXX%3Axxx&mode=advanced](https://xxx.primo.exlibrisgroup.com/discovery/search?vid=01ODIN_XXX%3Axxx&mode=advanced)

6.) Are search results in Primo being displayed correctly? Primo VE does not display in chronological order

The default brief results is by Relevance. There are other sorts available, which you can select during a search via the Primo VE Brief Results "Sort By" option: Date-newest, Date-oldest, Title, Author.

Documentation: "Configuring the Brief Results Page" - "Configuring the Sort By List on the Brief Results Page"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/025Display\\_Configuration/010Configuring\\_Discovery\\_Views\\_for\\_Primo\\_VE#Configuring\\_the\\_Sort\\_By\\_List\\_on\\_the\\_Brief\\_Results\\_Page](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Sort_By_List_on_the_Brief_Results_Page)

7.) Restricted CDI collections are available for search for authenticated users? What are these?

A "Restricted CDI collection" is that it is one which fits in these categories:

Electronic Collections where (CDI Search rights equals "Subscription")

Electronic Collections where (CDI Fulltext rights equals "Subscription (Linkresolver)")

8.) Displaying a local field in Primo (include the search/facet part) - 690 – Local ND Author could be a good example to use.

Always check the Primo VE documentation link "Mapping to the Display, Facets, and Search Sections in the Primo VE Record" first to make sure that a field isn't already included in display. To add a MARC field that is not already in the default set, you will need to do two steps: define the local field and then add the new local field to the view.

To define a new Primo VE local field:

Discovery Configuration > Display Configuration > Manage display and local fields >

Click "+Add field" > select "Add local field"

When done adding the Primo VE local field, be sure to click "Apply rules"

To add the new Primo VE local field to the Primo VE UI:

Discovery Configuration > Display Configuration > Configure Views > Code: [View Code] > Edit

For display: "Full Record Services" tab > details > Configure to add the new Primo VE local field

For facet: "Brief Results" tab > Facets > Configure to add the new Primo VE local field

Documentation: "Managing Display and Local Fields for Primo VE"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/025Display\\_Configuration/040Configuring\\_Local\\_Display\\_and\\_Search\\_Fields\\_for\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/040Configuring_Local_Display_and_Search_Fields_for_Primo_VE)

Documentation: "Managing Display and Local Fields for Primo VE" - "Adding a Field to a Display Line"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/025Display\\_Configuration/010Configuring\\_Discovery\\_Views\\_for\\_Primo\\_VE#Adding\\_a\\_Field\\_to\\_a\\_Display\\_Line](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Adding_a_Field_to_a_Display_Line)

Documentation: "Mapping to the Display, Facets, and Search Sections in the Primo VE Record"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/050Other\\_Configuration/Mapping\\_to\\_the\\_Display%2C\\_Facets%2C\\_and\\_Search\\_Sections\\_in\\_the\\_Primo\\_VE\\_Record](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/050Other_Configuration/Mapping_to_the_Display%2C_Facets%2C_and_Search_Sections_in_the_Primo_VE_Record)

9.) Setup a custom Search Profile and assign it to a Slot; including creating a custom local data scope.

To define a new Primo VE Search Profile:

Discovery Configuration > Search Configuration > Search Profiles >

Add Custom Scope or Search Profile as needed on the "Custom Local Data Scopes" and then "Search Profiles" tabs

To adjust the Primo VE search slots used in the Primo VE UI:

Discovery Configuration > Display Configuration > Configure Views > Code: [View Code] > Edit

For search slots: "Search Profile Slots" tab > to adjust the available slots or the profiles that they include

Documentation: "Configuring Search Profiles for Primo VE"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/022Search\\_Configuration/010Configuring\\_Search\\_Profiles\\_for\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/022Search_Configuration/010Configuring_Search_Profiles_for_Primo_VE)

Documentation: "Configuring Discovery Views for Primo VE" - "Configuring Search Profile Slots"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/025Display\\_Configuration/010Configuring\\_Discovery\\_Views\\_for\\_Primo\\_VE#Configuring\\_Search\\_Profile\\_Slots](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_Search_Profile_Slots)

#### 10.) Boosting records in search results

You can experiment with boosting on your Production environment either with your existing Search Profiles and Views, or in some cases by creating additional Search Profiles or Views and adjusting the boost options as described in the documentation links.

Documentation: "Configuring the Ranking of Search Results in Primo VE"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/022Search\\_Configuration/Configuring\\_the\\_Ranking\\_of\\_Search\\_Results\\_in\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/022Search_Configuration/Configuring_the_Ranking_of_Search_Results_in_Primo_VE)

Documentation: "Configuring Search Profiles for Primo VE" - "Boosting Records in Blended Search Profiles"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/022Search\\_Configuration/010Configuring\\_Search\\_Profiles\\_for\\_Primo\\_VE#Boosting\\_Records\\_in\\_Blended\\_Search\\_Profiles](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/022Search_Configuration/010Configuring_Search_Profiles_for_Primo_VE#Boosting_Records_in_Blended_Search_Profiles)

#### 11.) General view configs - How do we add more fields to the Advanced Search, How do we make the Advanced Search the default search, how to make changes to the main menu.

In order to add more Advanced Search indexes to Advanced Search:

Discovery Configuration > Display Configuration > Configure Views > Code: [View Code] > Edit

"Advanced Search Configuration" tab > Customize and Configure to adjust the indexes



In order to make the Advanced Search the default search: see #5 above.

In order to make changes to the Main Menu use the Discovery Configuration "Links Menu":

Discovery Configuration > Display Configuration > Configure Views > Code: [View Code] > Edit "Links Menu" tab >

Documentation: "Configuring Discovery Views for Primo VE" - "Configuring Advanced Searches"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/025Display\\_Configuration/010Configuring\\_Discovery\\_Views\\_for\\_Primo\\_VE#Configuring\\_Advanced\\_Searches](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_Advanced_Searches)

Documentation: "Configuring Discovery Views for Primo VE" - "Adding a Search Index, Resource Type, or Language to Advanced Searches"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/025Display\\_Configuration/010Configuring\\_Discovery\\_Views\\_for\\_Primo\\_VE#Adding\\_a\\_Search\\_Index.2C\\_Resource\\_Type.2C\\_or\\_Language\\_to\\_Advanced\\_Searches](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Adding_a_Search_Index.2C_Resource_Type.2C_or_Language_to_Advanced_Searches)

Documentation: "Configuring Discovery Views for Primo VE" - "Configuring the Links Menu"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/025Display\\_Configuration/010Configuring\\_Discovery\\_Views\\_for\\_Primo\\_VE#Configuring\\_the\\_Links\\_Menu](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Links_Menu)

Documentation: "Mapping to the Display, Facets, and Search Sections in the Primo VE Record"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/050Other\\_Configuration/Mapping\\_to\\_the\\_Display%2C\\_Facets%2C\\_and\\_Search\\_Sections\\_in\\_the\\_Primo\\_VE\\_Record](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/050Other_Configuration/Mapping_to_the_Display%2C_Facets%2C_and_Search_Sections_in_the_Primo_VE_Record)

12.) How do we get Wikipedia out of our search results?

Make sure you are searching CDI and not PCI results by making sure that you have added &searchCDI=true to the end of the search URL.

13.) Generally, how to change a label in Primo.

Open the Discovery UI Labels code table (Configuration Menu > Discovery > Display Configuration > Label).

Documentation: "Configuring Display Labels for Primo VE"

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/025Display\\_Configuration/030Configuring\\_Display\\_Labels\\_for\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/030Configuring_Display_Labels_for_Primo_VE)

14.) Can patrons view full text? For items that are not in EBSCO, this seems to be work fine. The EBSCO login keeps coming up when a link to EBSCO is clicked – have tried adding the &searchCDI=true and that doesn't seem to help – will try to figure out next week for the next checklist.

The &searchCDI=true should not be affecting this. Please provide the Permalink of an example.

Also, have you added the EBSCO Link Resolver plugin.

Documentation: "Configuring the Validity of EBSCOhost Full Text URLs"

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/090Integrations\\_with\\_External\\_Systems/030Resource\\_Management/230Checking\\_Full-Text\\_URLs\\_with\\_the\\_EBSCO\\_Link\\_Resolver\\_Plugin](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems/030Resource_Management/230Checking_Full-Text_URLs_with_the_EBSCO_Link_Resolver_Plugin)