Primo VE Essentials:

**1 Introduction**

Hello and welcome to Primo VE!

Your patrons will use Primo VE to find and access resources of all kinds - whether they are physical items owned by the library, e-resources your library subscribes to, digital content, or even resources beyond your institution’s collection.

Let’s look at an example of how Primo VE provides both Discovery and Delivery seamlessly. Discovery is the process of finding the resources and information that are most helpful to your patron. Delivery is the process of providing the patron with access to the resource, either the location of a physical resource or a link to an electronic or digital resource.

Let’s start with Discovery. In this example, I will enter “tourism” into the search bar and click the search icon. I get thousands of results. Each result appears in the brief results list here. Click on the title to see the full record with more details. Both the brief record and the full record have associated actions, which are configured and customized by your institution. Actions include, for example, sending the record to an email address or exporting a citation to Refworks. Click the “X” to go back to the brief results list.

On the side panel, there are all sorts of facets to help me organize and filter the results. These results include many resource types: books, journals, conference proceedings, videos, and more. If I am not interested in something, I can exclude that type. If I want something published recently, I can filter by creation date. I can see my Active Filters here.

Another way to search is to use Advanced Search. This gives the patron several options for refining their search and allows them to add multiple lines of criteria. Click Simple Search to return to the regular search bar.

Other methods of discovery may be available in your Main Menu Links. These Main Menu Links are configurable, so yours may be different than the ones shown here. Here are a few links that we have enabled: Journal search, which allows the patron to search for journals by title, keyword, and category, as well as search for articles inside a specific journal. Collection discovery - Collections are groups of resources that patrons may want to explore, which have been defined by library administrators. And Fetch item, which is useful when looking for a specific book, article, or journal.

Delivery is when the patron gets to access the resource itself. Here is a book that is available online, and I can access it with a few clicks. Here is a book that is available in the Main Library, in this location. There are also options for requesting resources that are not immediately available.

At the top of the results list, I have the option to Save this query, and I can save individual records by clicking the pushpin icon. This big pushpin icon at the top opens My Favorites. Here you can see saved records, searches, and search history. If you are not signed-in, these will be lost when you close the browser.

In the upper right of the screen is the sign-in button. When a patron is signed-in, they may get access to some resources that are only available to certain users. Primo VE will “remember” their saved records and searches any time they sign-in. They can also add labels to their saved records as a way of organizing them into groups.

Signed-in users can open the menu and then view a page called “My Library Card.” Here, they can see any items they have on loan from the library along with other information such as fees or messages. They can also adjust their account settings.

The items in this menu are also configurable. Notice that you can change the display language here. And you can sign out here.

Your Primo VE home screen may look different than this one. Your institution’s Primo VE administrators have many options for configuration and customization. Your Primo VE site is the portal through which your patrons experience your library. Most institutions will want their site to match their institutional branding, including their logos and colors. Your administrators will also choose which display languages to offer and what text will appear on the homepage. Almost everything about search, display, and actions can be configured, so they will be able to set up Primo VE to be optimized for the needs of your patrons.

In fact, they can set up more than one view, each for a different purpose. There could be different views for the Main library and the Law library, for instance. Or a test view to try out new configurations. Each view can have its own look-and-feel.

You can send feedback here, from the bottom corner, which will be sent to a Primo VE administrator or librarian at your institution. Primo VE documentation and training can be found on the Ex Libris Knowledge Center.

Thanks for watching!