



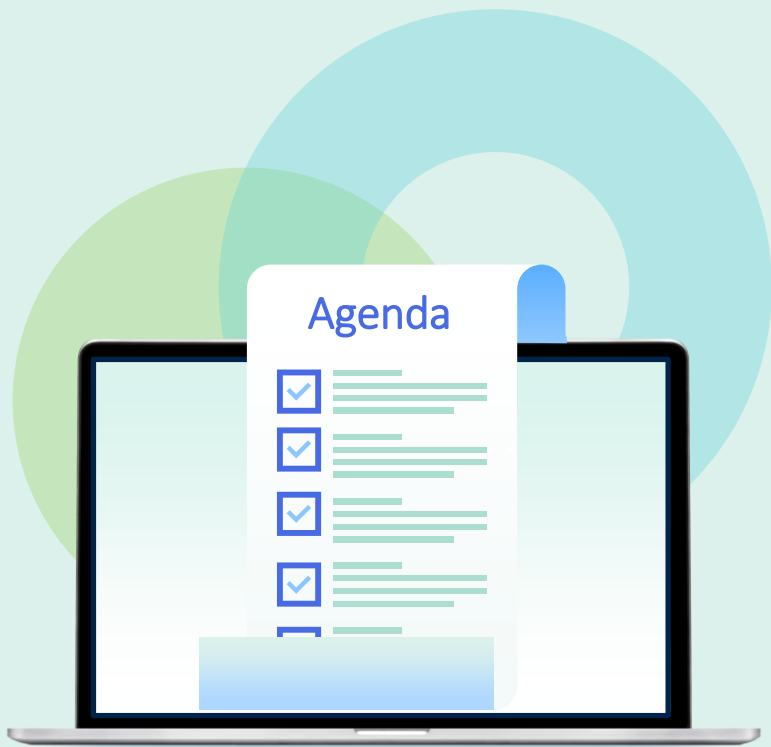
# Introduction to Primo VE Administration

Jenny Draeger — Senior Team Lead, Customer Education

Chris Dixon — Technical Support Analyst

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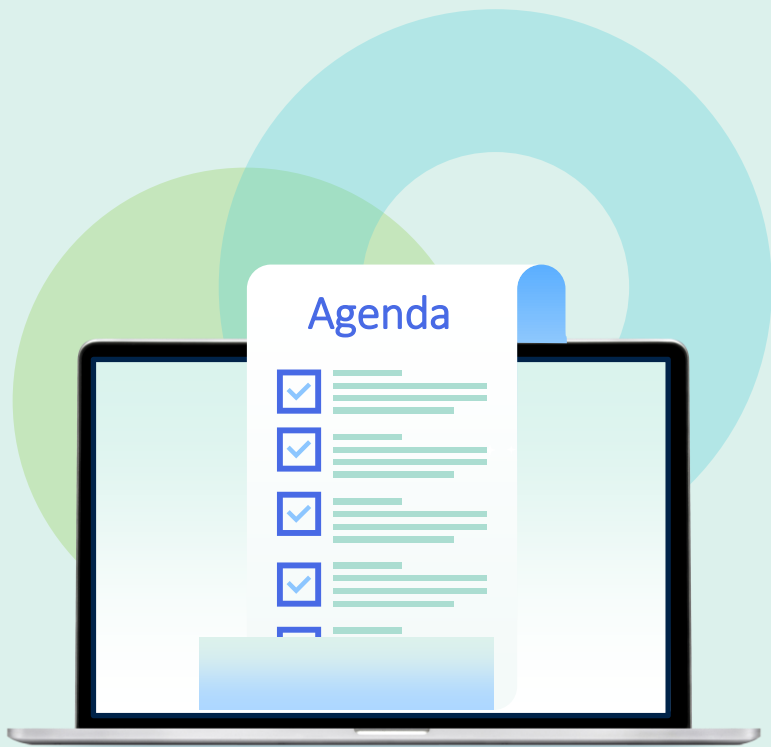


## Search Configuration

- Search Scopes, Profiles, and Slots
- Basic and Advanced Search
- Personalize Your Results

## Display Configuration

- Views
- Labels
- My Library Card Configuration



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# Search Scopes, Search Profiles, and Search Profile Slots

## Search Scopes

- **Group of records that meets specific conditions (i.e. belong to a specific library, from a specific data source, etc.)**
- **Must be included in Search Profiles to appear in UX**
- **Can be used in one or more Search Profiles**

## Search Profiles

- **Group of records used to search**
- **Contains one or more Search Scopes**
- **Multiple Search Profiles can be configured for an institution, for example the entire repository, a library, a collection, and more.**

## Search Profile Slots

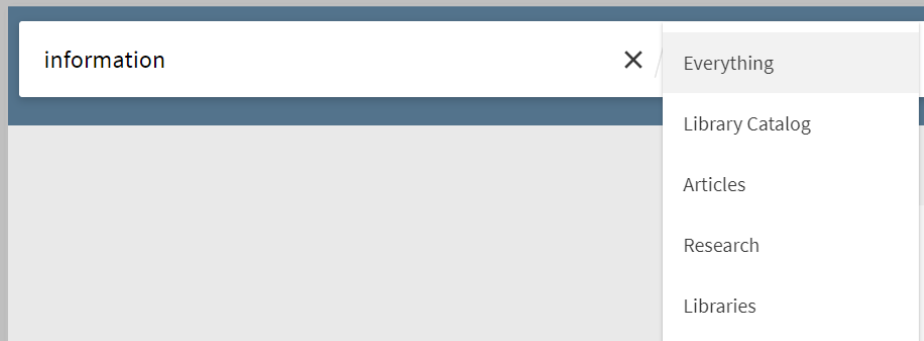
- **Exposes a Search Profile in the discovery interface**
- **Configured at the view level**
- **Visible to the user when they start typing their query**
- **Can contain one or more Search Profiles**
- **View can contain one or more search slots**

# Search Profile Slots viewable in Primo VE

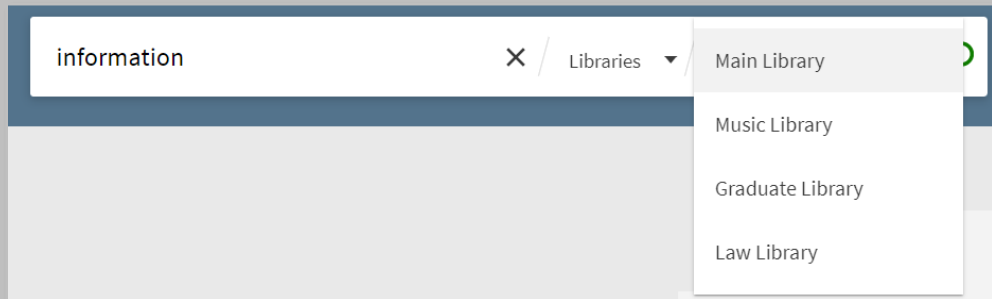
## Before selecting search slot

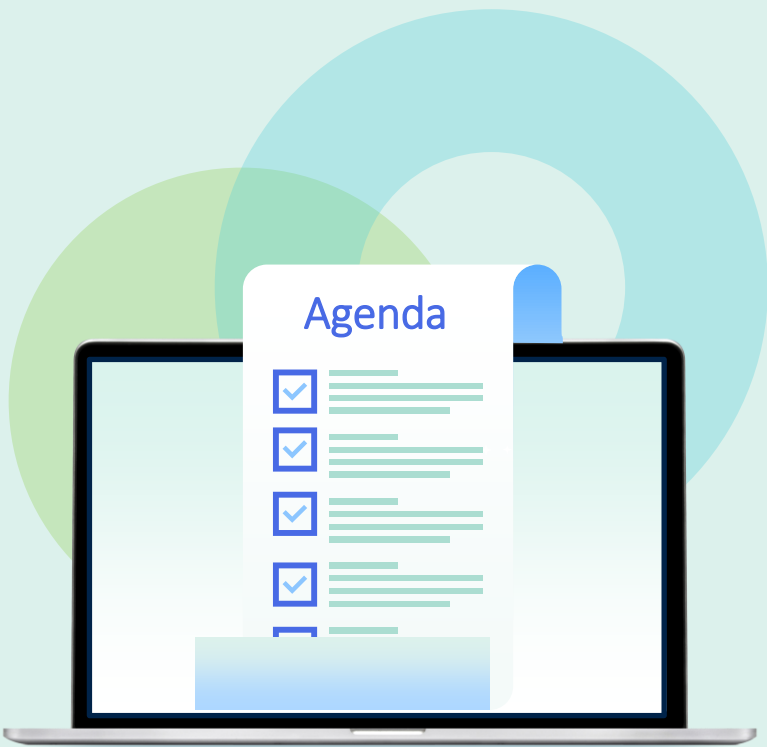


## After initial Search in Everything: single profile in slots



## After initial Search in Library: multiple profiles in slot



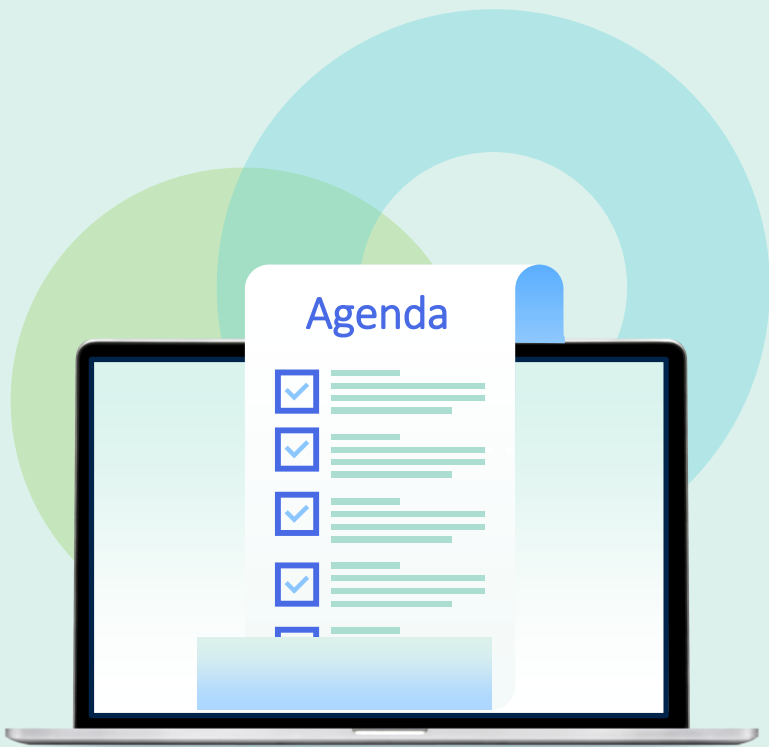


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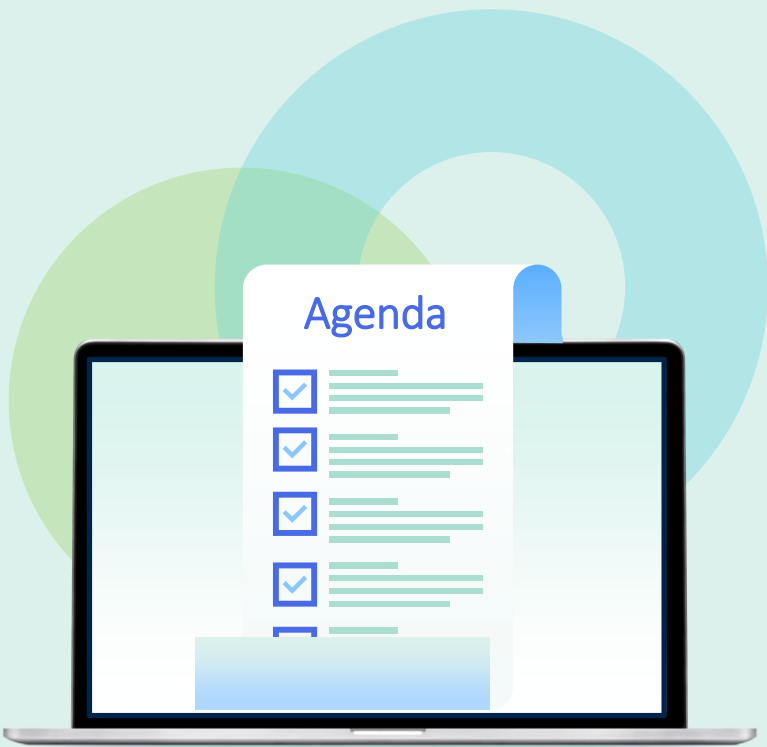


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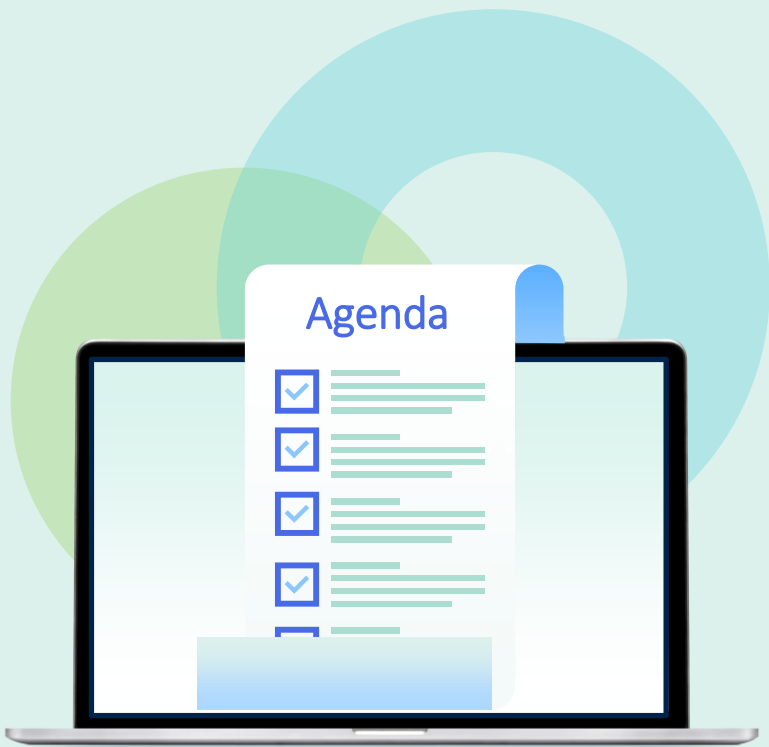
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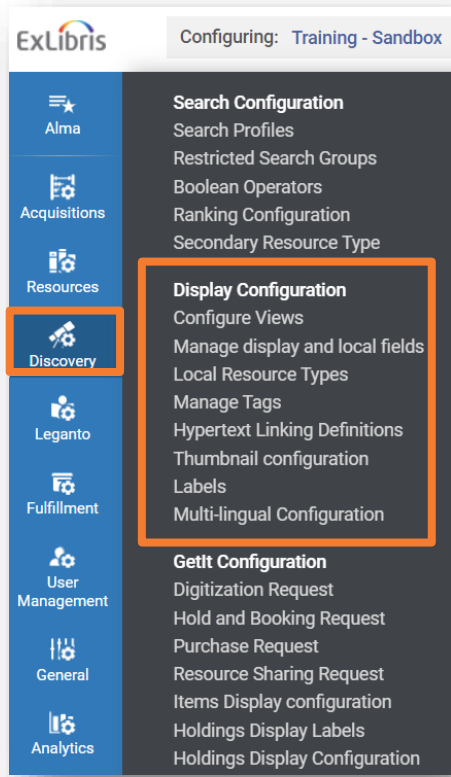
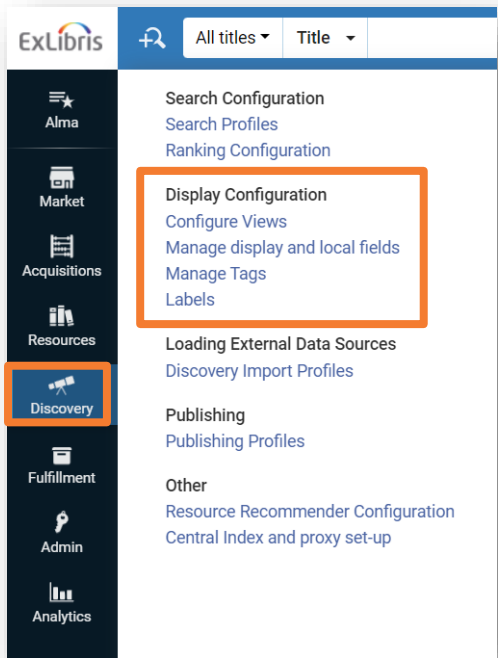
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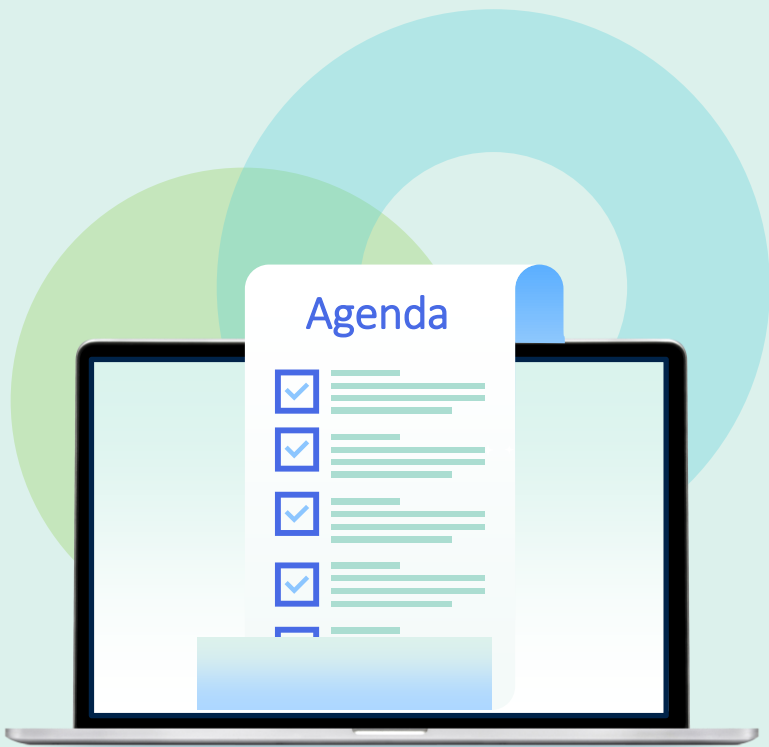
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# Display Configuration

Display Configuration can be accessed under the **Alma > Discovery** and the **Alma Configuration > Discovery** menus





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- **Views**
- Labels

# Configure Views – Union View for Consortium

View Configuration Back Save

General Links Menu Search Profile Slots Advanced Search Configuration Brief Results Brief Record Display Full Record Services

Manage Customization Package

Define View

Code \* EXLDEMO2\_INST:UnionView\_UNION Name \* UnionView

Description

General Attributes

Discovery network settings

Display locations from member institutions  i Display online services from member institutions  i

Include member institution physical inventory in facets  Never  Only in cross institution search  Always i

Library Facet  Do not display member libraries  Display member libraries separately  Display member libraries with my institution libraries

**IN NETWORK ZONE: Discovery > Display Configuration > Configure Views > Edit > General**

# Configure Views – Consortium

Discovery network settings ▼

Display locations from member institutions  i

Display online services from member institutions  i

Include member institution physical inventory in facets  Never  Only in cross institution search  Always i

Library Facet  Do not display member libraries  Display member libraries separately  Display member libraries with my institution libraries

***Discovery > Display Configuration > Configure Views > Edit > General tab***

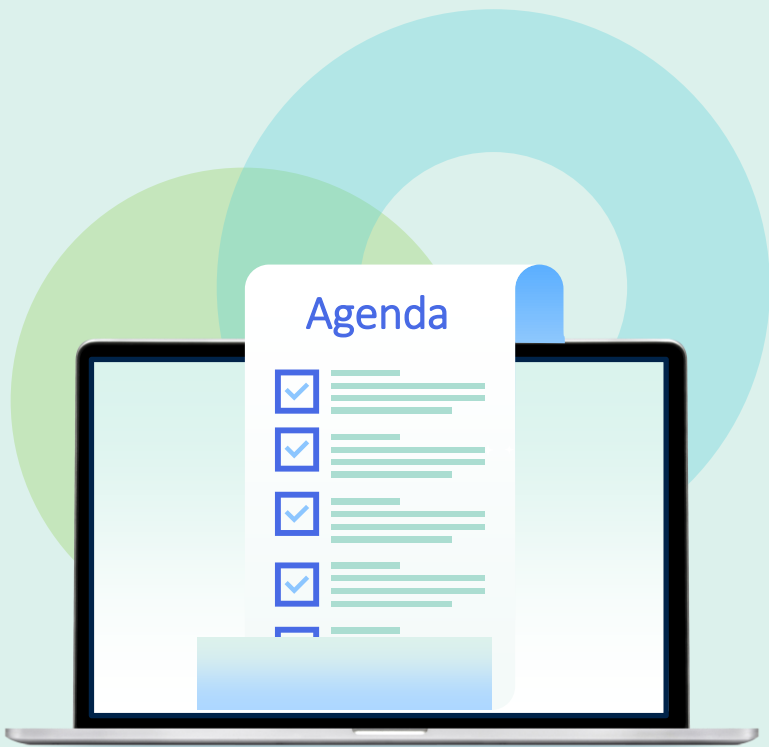
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***IN NETWORK ZONE:***

***Discovery > Display Configuration > Configure Views > Edit > General***

# Configure Views – Consortium

***Discovery > Display Configuration > Configure Views > General***



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# Resources

# Knowledge Center Resources

- [Auto Complete Configuration Guide](#)
- [Search Configuration for Primo VE](#)
- [Discovery Configuration for Primo VE](#)

Includes information on configuring links, search profile slots, advanced searches, brief results page, brief record display, full display page

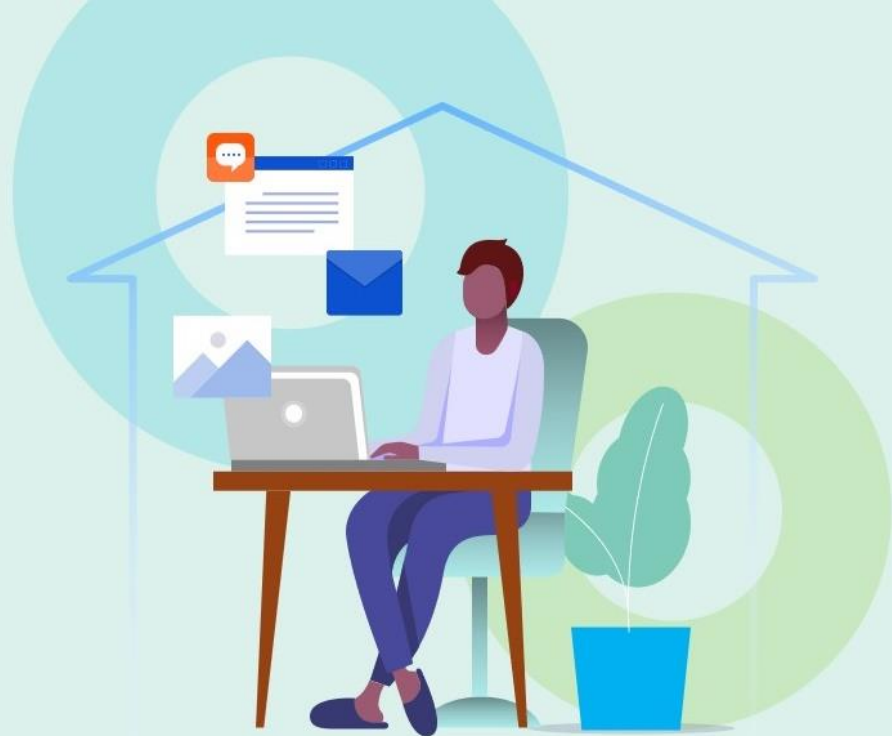
The survey for this session can be accessed via the QR code or URL

# Thank you!

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