Primo VE Administration
Delivery

Hello! Delivery is an important part of Discovery, it’s how patrons get the items they need; whether it’s a physical or electronic item.

In this session you will learn what Primo VE Delivery Services are, how to configure Request Forms, manage Holdings & Items Displays, and configure the ways that patrons can get an item.

For patrons to access your institutions resources, Primo VE provides delivery services based on your Alma inventory\*. On both full record pages and the brief record, Primo VE displays availability information; additional online links are only shown in the full record display.

In the full record display there are four ways delivery can be provided, based on material type.

* Get It – allows users to place requests on physical items; additional services such as digitization and booking may also be offered by your institution.
* View It – displays electronic resources and digital items that are subscribed to or owned by your institution. Please note that the out-of-the-box label for this feature is View Online.
* How to Get It – if a record has no inventory, an institution may configure additional options for their patrons to obtain the item, such as purchase and resource sharing requests.
* Links – displays additional links for the resource

Please note, that if a record has both print and electronic inventory, both Get It and View It will appear on the full record display page.

Primo VE offers integrated request options to streamline delivery services. When a patron uses one of these options for delivery, such as for Get It or How to Get It, they will be prompted to fill out the request form.

To customize these forms, in Alma, navigate to Configuration > Discovery. Under the Get It Configuration section you can see each of these forms. When you open a configuration page you will have different options depending on the form selected. For this example, you’ll choose a Digitization Request.

After you select a form to configure, you can choose which fields will be visible and whether they will be mandatory. If you want to add a checkbox for your own custom field, locate the generic field and select Yes for it to Display to Public, and check the box if you want to make it mandatory. Click Save when you’re done.

To update the label that is displayed with your new checkbox go to Discovery > Display Configuration > Labels. Find the table of the labels for your form, in this case Digitization Labels… open the row action tool and select Customize. In this list find the new Generic Field, open the row action tool and click customize. Now you can change the description which will be the text displayed in Primo VE. When you’re done, click Customize.

Back in Discovery when you open an item, and request a digitization. You’ll see the new checkbox you just added. Additionally, you can also configure the copyright statement to display as an out-of-the-box option, and in this case it has been made a mandatory field.

Now let’s look at how you can configure what information is shown in the Get It section of a record’s full display page and the brief item display.

Back in Alma Configuration, go to Discovery > GetIt Configuration > Items Display configuration. Here you can configure the Brief Item Display and the Full Item Display in the corresponding sections. Use the toggle buttons to activate or deactivate a line.

To edit the content in a row or change the label, click on the row action tool and select Edit. In the pop-up you have the option to change the label; to show no label enter NOT\_DEFINED. If you would like to add more information, click Add Field, and select the field you would like from the drop-down. Click Add Field when you’re done; and then Done when you’re finished making changes. \*

Now back in Discovery, in the list of results, and when you open a full record for an item, you can see the changes you made in the Get It section.

In addition to requests for resources owned by or subscribed to by your institution, you can define additional services to display in the How to Get It section for users to locate the item.

To configure these links, in Alma Configuration, you’ll go to Fulfillment > Discovery Interface Display Logic > General Electronic Services. This page will list all currently configured services. You can use the toggles to activate or deactivate them; as well as select Edit from the row action tool to make changes.

You need to create a new service for ILLiad \_\_\_, so you’ll click Add Service. In the pop-up you’ll fill in the requested information. The Service Code and name are for internal use; you can add a description if you like. The Public Name is the label that will display in View It and/or Get it, and the Public Note will be displayed beneath the Public Name if entered here.

Next you’ll select whether this is a Document Delivery/ILL Service. Please note, if you select No here, this service will be listed in the Links section. If you select Yes, you will also need to choose a Display Location, for this example you’ll choose GetIt and How to Get It. The URL Template is the URL where the patron will be redirected to. For more information about how to format this field, please visit the Knowledge Center.

Finally, selecting Yes for Item Level will show a link next to each item that matches the input rules. If you select No, the link will be displayed at the holding level.

When you’re done click Add and Close. Your new service has now been added. To make changes click the row action tool and select Edit. Here you can make changes to the Service Details and configure the Service Availability Rules which is how the system determines if a service should be displayed to the user. Please note, that input parameters are optional, by default, service availability is always false and will never show in Primo VE. Hiding resource access is done with display logic rules. For more information about how to manage these tabs, please visit the Knowledge Center.

If you want to change the order in which your Electronic Resource links are displayed, navigate to Fulfillment > Discovery Interface Display Logic > General Electronic Services Order. Here you can see the services that are currently listed. Use the Up and Down arrows to rearrange services. To add a service click Add to Top, and use the drop-down menus to select the new service link. Click Add to top when you’re done. You can also add services to be placed at the end of the list by adding them in the Services to be placed last section.

You now know what the Primo VE Delivery Services are, how to configure Request Forms, manage Holdings & Items Displays, and configure services in the How to Get it feature.

Thanks for watching!