Primo VE Administration
User Interface Customization

Hello! In Primo VE you can customize the look and feel of the user interface (or UI), which is what users will see when they access the institution’s catalog. There are two ways to customize your interface with either the Customization Package or Primo Studio. Please note, that UI customization is the institution’s responsibility, not ExLibris. However, please reach out to Support if you have any questions.

In this session you will learn about each of the ways to customize Primo VE, including the Customization Package and Primo Studio. Keep in mind that it is highly recommended that you only choose one of these customization options.

The Customization Package allows you to upload and manage a package of files to brand and customize your system. If you are using this method and do not upload a package the system will use out-of-the-box configurations.

To create a Customization Package, in Alma, you’ll go to Configuration > Discovery > Display Configuration > Configure Views. On the Views List page, click the row action tool for the View you want to create the Customization Package for, and select Edit. After the page loads, click the Manage Customization Package tab. In the Download Package section, you can choose which package to download and customize.

You can customize email templates in the Upload Templates section below. You only need to use this section, if you are not going to configure it in the Customization Package.

Current View Customization Package is the package for the current view, if it is greyed out, it means that you are using the out-of-the-box template; and you will need to download the Template View Customization Package.

The Central Customization Package allows a consortium to define a single customization package that can be used directly or as a template by each member institution. You must be a Discovery Administrator for the Network Zone to be able to create and modify the Central Package.

If this is the first time you are customizing your UI, you can just click Download; this downloads the Template View Customization Package. Otherwise, download the current package to ensure that you are using the latest version.

In this example, you need to customize the interface for the current view so you would click to download the Current View Customization Package. The package will download as a zip file. You’ll unzip and make the customization changes as needed.

Each package contains a specific group of files. The top folder should be titled VIEW\_CODE, and include four subfolders: css, html, img, and js. In order to customize Primo VE with this method, you should be familiar with CSS, HTML, JavaScript, and AngularJS. For more information on how to customize the files within the downloaded package, please visit the Knowledge Center.

When you’re done editing, you’ll zip the folder back up. We recommend that you use 7zip or Winrar instead of Windows Send to > Compress folder, to avoid upload errors. Additionally, ensure that the top folder of your package's zip file is the View\_Code folder, which must have the following format: institution\_code-view\_code, such as the example shown here. Then click the folder icon in the Upload Package section; locate the file, and click Upload.

To add a clickable logo in the top left corner in Discovery, you can upload a logo file and enter the URL where you want it to go when clicked. This is usually back to the main screen of Discovery.

The second option for customization is using Primo Studio. Still on the View Configuration page of the view you would like to edit, there is a link to Go to Primo Studio. This will load Primo Studio with the default customization package, from here you can customize and test aspects of your Primo view including: colors, modifying images used for the logo, favicon, and resource types, as well as enable add-ons that have been created and shared by the Primo community.

Click the options along the left to modify various parts of your UI, which will be immediately reflected in the preview on the right. For more information about each of the customization sections in Primo Studio, please visit the Knowledge Center.

After you have made your changes in Primo Studio, the Download Package tab allows you to save your modifications to a customization package on your local machine. So that you can either modify the package later in Primo Studio for further changes and testing or deploy the package to the UI for live use. Please note that if you do not download the customization package after you have made changes, all modifications will be lost.

To make further changes to a customization package previously created in Primo Studio click the UploadPackage tab, click Choose package and locate your file. When you click Upload package Primo Studio will load in the file and display it on the right.

Once you’re happy with your modifications, and have downloaded the package, go back to Alma Configuration. On the View Configuration page you will upload the package you created in Primo Studio.

Please note, that it is strongly recommended that you use either Primo Studio or manual customizations using the downloaded Customization Package to avoid errors.

You now know about each of the ways to customize Primo VE, including the Customization Package and Primo Studio.

Thanks for watching!