Primo VE How-To

How to Configure the Resource Type Filter Bar

When enabled, a Resource Type Filter Bar appears under the simple search box. Users can click on a resource type to filter their search and only show results of that type. Aside from “All” there can be up to six resource types visible, with more accessible under the More menu. The resource types that are displayed in the filter bar may depend upon which Search Profile Slot is being used.

The Resource Type Filter Bar is configured on the View level.

To do this, you’ll need to open Configure Views, which can be found under Display Configuration both in the Alma Discovery menu and in the Alma Configuration, Discovery Configuration menu.

Select Configure Views. Choose the View. Select Edit from the row-action menu.

Select the Brief Results tab and scroll down to Resource Types Filters Bar.

Check the box to Enable the Filters Bar for this View, meaning reveal it to users. However, you may want to customize it first. Below, you can see the active Filters, along with the Search Profile Slots for which they have been enabled. Use a toggle switch to disable a filter completely. Select Edit from the row-action menu to make changes to that resource type filter. This opens a window showing the Resource Type at the top. What follows is a list of the Search Profile Slots and whether this Filter will appear for each one.

In other words, when a user chooses a Search Profile Slot, only the Resource Type Filters that are enabled for that Slot will appear in the Resource Type Filter Bar.

Use the toggle switches to adjust as you see fit. Then click Done.

To add another button to the Filter Bar, click Add Resource Type. Use the drop-down menu to select from many options. Customize the Slots, and then click Add Resource Type. Here you can see that it has been added. Up to ten Filters can be active. The first six will appear on the Filter Bar. The others can be accessed from the More menu. You can change the order by dragging them.

When you are ready to show it to users, remember to Enable the Filter Bar.

Note that the Resource Types Filters Bar cannot be enabled at the same time as the Pre-filter Bar. To disable the Pre-filter Bar, open Advanced Search Configuration. Enable for Basic Search must be unchecked under List of Indexes and under List of Resource Types.

That’s How to Configure the Resource Type Filter Bar.