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# A Spotlight on Functionalities You can Enable to Maximize Your Primo VE Experience

Presented by:

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# Agenda

Search Functionalities

Full Record Display

Resource Type

# Agenda

**Search Functionalities**

Full Record Display

Resource Type

# Search Functionalities

- Support “Starts With” Option for Call Number Searches
- Barcode Search
- Exact Phrase Only Searches in Advanced Searches

# “Starts With” Option for Call Number Searches

When enabled users can search for holdings call numbers with the “start with” search operator

SEARCH CRITERIA ^

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Search for:

Library Catalog    Online Access Materials    Everything    Articles    Course\_Reserve

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Search filters

**Holding Call Number** ▼ **starts with** ▼ **2001**

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AND ▼ Any field ▼ contains ▼ Enter a search term

[+ ADD A NEW LINE](#)   [CLEAR](#)

Material Type

All items ▼

Language

Any language ▼

Start Date:

Day ▼ Month ▼ Start Year

End Date:

Day ▼ Month ▼ End Year

# “Starts With” Option for Call Number Searches Configuration

- Configuration > Discovery > Other > Customer Settings

Parameter	Parameter Value	Outcome
<b>allow_start_with_for_call_number</b>	False (default)	Starts with searching is not available in call number searches
	True	Enables search for holdings call numbers that start with specified value in Advanced Search

- Configuration > Discovery > Display Configuration > Configure Views > Edit View > Advanced Search Configuration tab
- Enable the search index “Holding Call Number”

# “Starts With” Option for Call Number Searches

- Configuration > Discovery > Display Configuration > Labels

Code Table	Code	Default Label
Aria Labels	nui.aria.search.startswithAria	This search type is available only for Title field
Search Tile Labels	search-advanced.precisionOperator.option.startwithTitle	This search type is available only for Title field

# Barcode Search

When enabled users can locate specific physical items on the shelves, easily.

The screenshot displays a library search interface. At the top, there are two tabs: 'SEARCH CRITERIA' and 'BARCODE SEARCH', with the latter highlighted by a red box. To the right of these tabs is a 'SIMPLE SEARCH' button. Below the tabs is a search input field containing the barcode number '39031025546128'. To the right of the input field is a magnifying glass icon and the word 'SEARCH'. Below the search bar, the search results for a video titled 'The brain' are shown. The video is by Bennett, Thomas L.; Butler, Michelle.; Page, George (George H.); Vattano, Frank J.; Annenberg/CPB Project.; Colorado State University. Office of Instructional Services. The year is c2002. A green pin icon is visible in the top right corner of the result card. Below the video information, there is a 'TOP' link, a 'SEND TO' section with a 'Send to' input field, and a 'GET IT' section with various options: EXPORT BIBTEX, EXPORT RIS, EASYBIB, ENDNOTE, REFWORKS, PRINT, and CITATION. Below the 'GET IT' section, there is a 'GET IT FROM OT...' link and a 'DETAILS' link with a 'PERMALINK' and 'EMAIL' option.



# Barcode Search Configuration

- Discovery > Display Configuration > Configure Views > Edit View > General tab

General Attributes

Time-out URL

Timeout (in minutes) for signed in users \*

Side bar (Tweak my results) position

Select as Default View

Enable Collection Discovery Features

Highlight reference entry on top

Use Voice Search

Set focus on search box

Enable QR On Top

Display Quick Links

Display Favorites Warning Message for Guests

Timeout (in minutes) for guest users \*

Enable Barcode Search

Display link to Newspapers Search

Related records display

Enable Edit My Library Card

Enable recent scopes search

Display Unpaywall Links

Display all links in View Online section

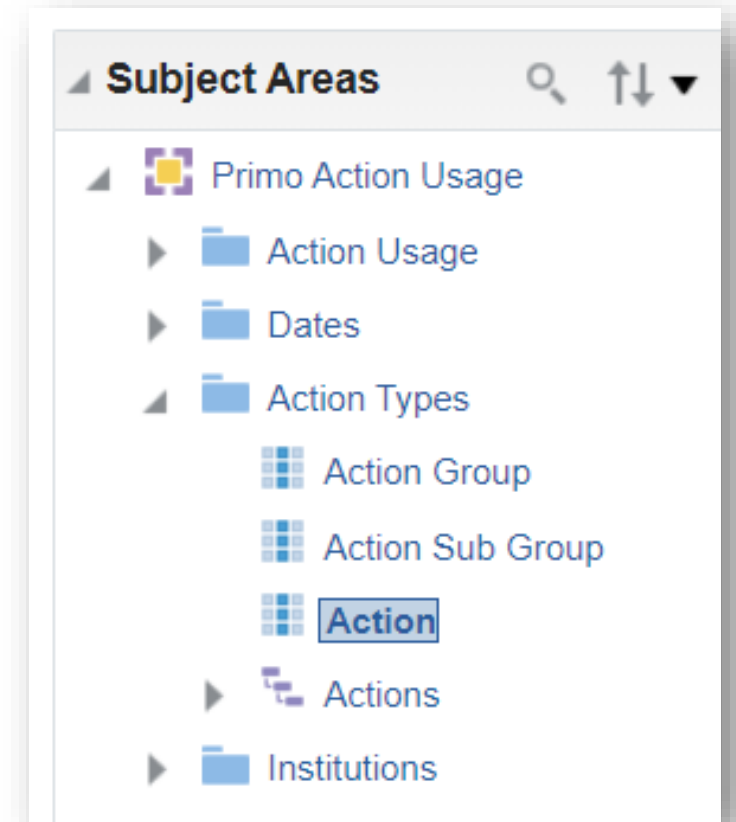
# Barcode Search

- Discovery > Display Configuration > Labels

Code Table	Code	Default Label
Search Tile Labels	nui.search-barcode.barcodeSearch	Barcode Search
	nui.search-barcode.barcodeSearchButton	Search
	nui.search-barcode.noResults	No records found for {{searchTerm}}
	nui.search-barcode.noResultsText	Try to refine your search term
	nui.search-barcode.searchTerm	Enter a barcode
Aria Labels	nui.aria.search.barcodeSearch	Search by Barcode

# Barcode Search Analytics

- Action has been added to Primo Analytics > Action Usage Subject Area
- Action: Barcode Search



# Exact Phrase Only Searches in Advanced Searches

- Equals exact phrase = returns results that contain **only** the exact phrase.
- Contains exact phrase = returns results that **include** the exact phrase, but could also contain other words

The screenshot displays an advanced search interface with the following elements:

- SEARCH CRITERIA** and **BARCODE SEARCH** tabs at the top.
- Search for:** Radio buttons for **Library Catalog** (selected), **Everything**, and **Articles**.
- Search filters** section with a dropdown menu for **Any field** containing options: **contains**, **contains exact phrase**, **starts with**, and **equals exact phrase** (highlighted with a red box).
- Material Type** dropdown menu with **All items** selected.
- Language** dropdown menu with **Any language** selected.
- Start Date:** Fields for **Day**, **Month**, and **Start Year**.
- End Date:** Fields for **Day**, **Month**, and **End Year**.
- AND** dropdown menu and **+ ADD A NEW** button.
- Summary bar at the bottom: **→ Any field contains \_\_\_\_ AND Any field contains \_\_\_\_** with a **SEARCH** button.

# Exact Phrase Only Searches in Advanced Searches Configuration

- Discovery > Display Configuration > Configure Views > Edit View > Advanced Search Configuration tab
- Out of the box: this operator is enabled by default for new views

Search Operators

1 - 4 of 4

	Active	Code	Search Profile Slots
1	<input checked="" type="checkbox"/>	Contains	ALL
2	<input checked="" type="checkbox"/>	Contains exact phrase	ALL
3	<input checked="" type="checkbox"/>	Starts with	ALL
4	<input checked="" type="checkbox"/>	Equals exact phrase	ALL

# Exact Phrase Only Searches in Advanced Searches Configuration

Configuration > Discovery > Dis  
Search Operator Column:

Details

Title	The art spirit : notes, artic technique of picture maki
Creator	Henri, Robert, 1865-1929. Ryerson, Margery. >
Subject	Art >
Publisher	Philadelphia : Lippincott
Creation Date	1951
Format	226 p. : illus.
Source	Library Catalog

SEARCH CRITERIA

→ Author/Creator equals exact phrase Henri, Robert AND Any field contains \_\_\_\_\_ SEARCH

Sign in to get complete results and to request items Sign in DISMISS

0 selected 1-7 of 7 Results Personalize

1 BOOKS  
The art spirit : notes, articles, fragments of letters and talks to students, bearing on the concept and technique of picture making, the study of art generally, and on appreciation  
Henri, Robert, 1865-1929.; Ryerson, Margery.  
1951  
Available at Main Library Main Stacks (N7445.2 .H46 1960) >

2 ARTICLE  
Facilitating population genomics of non-model organisms through optimized experimental design for reduced representation sequencing

# Exact Phrase Only Searches in Advanced Searches

- Discovery > Display Configuration > Labels

Code Table	Code	Default Label
Search Tile Labels	search-advanced.precisionOperator.option.equalsPhrase	Equals exact phrase
	search-advanced.precisionOperator.option.equalsPhraseTitle	This search type is available only for Title, Author and Subject fields
	search-advanced.precisionOperator.option.startswithTitle	This search type is available only for Title field
Aria Labels	nui.aria.search.contains	Contains
	nui.aria.search.containsExact	Contains exact phrase
	nui.aria.search.startswithAria	This search type is available only for Title field
	nui.aria.search.equalsPhraseAria	This search type is available only for Title, Author and Subject fields

# Agenda

Search Functionalities

**Full Record Display**

Resource Type



# Full Record Display

- Alphabetic Sort of Subjects
- Direct Linking from Full Record Display
- Display Item Policy in GetIt

# Alphabetic Sort of Subjects

When enabled, subjects that display in the record's full details can be sorted alphabetically by subject

Details	
Title	Merchant organization and maritime trade in the North Atlantic, 1660-1815
Creator	Janzen, Olaf Uwe, 1949- > International Maritime Economic History Association. > International Economic History Congress (12th : 1998 : Seville, Spain). >
Subject	Merchant marine -- History > Merchant marine -- North Atlantic Ocean -- History > Shipping -- North Atlantic Ocean -- History > North Atlantic Region -- Commerce -- History >
Genre	Merchant marine History Congresses.

Disabled (default)

Details	
Title	Merchant organization and maritime trade in the North Atlantic, 1660-1815
Creator	Janzen, Olaf Uwe, 1949- > International Maritime Economic History Association. > International Economic History Congress (12th : 1998 : Seville, Spain). >
Subject	Merchant marine -- History > Merchant marine -- North Atlantic Ocean -- History > North Atlantic Region -- Commerce -- History > Shipping -- North Atlantic Ocean -- History >
Genre	Merchant marine History Congresses.

Enabled

# Alphabetic Sort of Subjects Configuration

- Configuration > Discovery > Other > Customer Settings

Parameter Key	Parameter Value	Outcome
<b>subjects_alphabetical_sort_fullDisplay</b>	False (default)	Subjects display in order from metadata record
	True	Subjects sort alphabetically

# Direct Linking from Full Record

When enabled, users can go directly to full text from the full record when clicking on the brief availability status.

The screenshot displays a library record for an article. On the left is a sidebar with navigation links: TOP, SEND TO, VIEW ONLINE, DETAILS, TAGS, LINKS, and CITATIONS. The main content area shows the article title "The Master of ...": creating names for art history and the art market, authors Oosterlinck, Kim; Radermecker, Anne-Sophie, and publication info from the Journal of Cultural Economics. A quote from the article is also present. Below the article info is a "PEER REVIEWED" badge. A red box highlights the "Available Online" link with the text "Enabled: Direct link to provider". Below this is a "Send to" section with various sharing options: READING LIST, EXPORT TO EXCEL, MENDELEY, QR, EXPORT BIBTEX, EXPORT RIS, EASYBIB, ENDNOTE, REWORKS, PRINT, CITATION, and PERMALINK. Another red box highlights the "View Online" link with the text "Disabled: Link to View Online". At the bottom, a "Full text availability" section shows the provider "ProQuest Pharma Collection New Platform" with the note "Available from 1996. Most recent 1 year(s) not available."

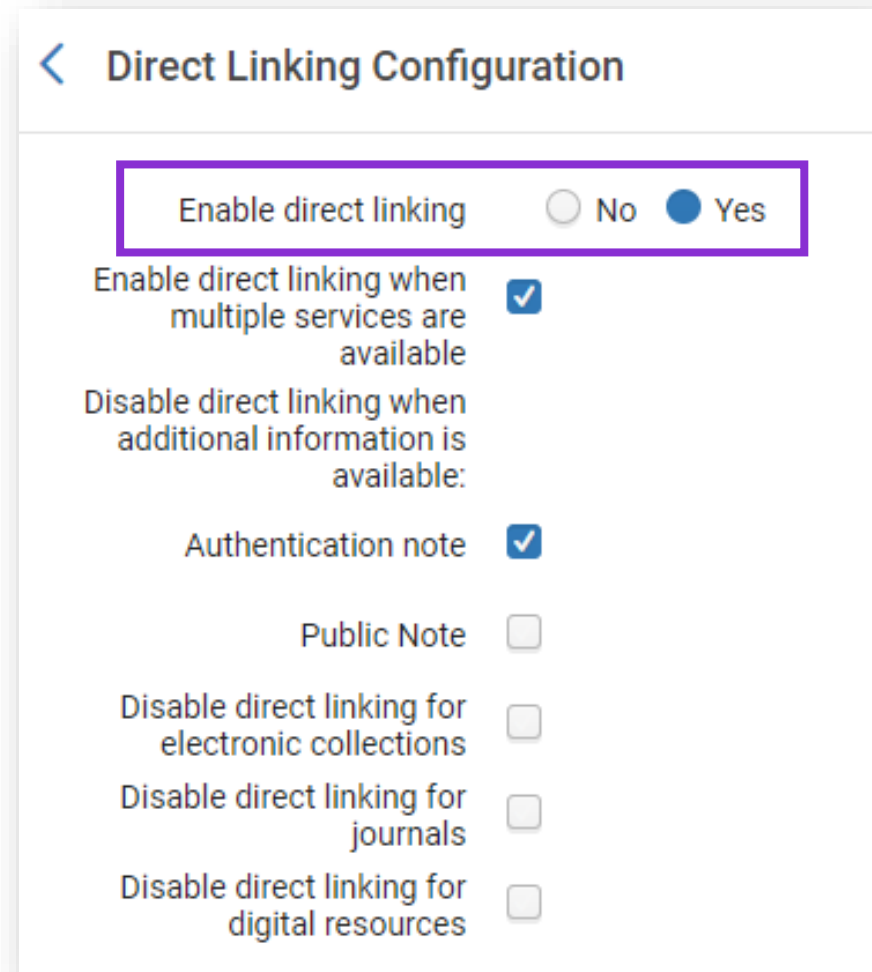
# Direct Linking from Full Record Configuration

- Configuration > Discovery > Other > Customer Settings

Parameter Key	Parameter Value	Outcome
<b>apply_direct_linking_settings_in_full_record</b>	True	Direct linking from the full record's display is enabled
	False (default)	Direct linking is disabled

# Direct Linking from Full Record Configuration

- Configuration > Fulfillment > Discovery Interface Display Logic > Direct Linking
- Enable direct linking: must be set to Yes



< Direct Linking Configuration

Enable direct linking  No  Yes

Enable direct linking when multiple services are available

Disable direct linking when additional information is available:

Authentication note

Public Note

Disable direct linking for electronic collections

Disable direct linking for journals

Disable direct linking for digital resources

# Display Item Policy in Get It

When enabled, the item's policy is presented in the Item Display information.

This information is displayed in Primo only if the Item Policy field is configured in Alma's Physical Item Editor

The image shows two overlapping screenshots from the Alma library system. The background screenshot is the 'Get It' interface for a book. It displays the location 'Biology Library' and the item status 'Available, Biology Stacks ; RA784 .N46 2006 (1 copy, 1 available, 0 requests)'. A red box highlights the 'Item status Queue: Item in place' and 'Item policy: Four Day Loan' information. The foreground screenshot is the 'Physical Item Editor' form. It has tabs for 'General', 'ENUM/CHRON', 'Notes', and 'History'. The 'General Information' section contains various fields. A red box highlights the 'Item policy' dropdown menu, which is currently set to 'One Week Loan'. Other fields include Barcode (A13623), Material type (Book), Provenance, PO Line, Receiving date, Enumeration A, Chronology I, Description, Pages, Replacement cost, Physical condition, Process type, Copy ID, Is magnetic, Issue date, Expected receiving date, Enumeration B, Chronology J, Pieces, and Receiving operator (jransom). Buttons for 'Generate', 'Relink to another bibliographic record', 'Cancel', and 'Save' are also visible.

# Display Item Policy in GetIt Configuration

- Configuration > Discovery > GetIt Configuration > Items Display Configuration

Display Items

Brief Item Display

Restore  

	Active	Item cell code	Item fields to display	Display label	
1	<input checked="" type="checkbox"/>	item.brief.1	Item status Queue	Item status Queue:	...
2	<input checked="" type="checkbox"/>	item.brief.2	Terms of use	Terms of use:	...
3	<input checked="" type="checkbox"/>	item.brief.3	Item description	Item description:	...
4	<input checked="" type="checkbox"/>	item.brief.4	Item Policy	Item policy:	...



# Agenda

Search Functionalities

Full Record Display

Resource Type

# Resource Type config

- Resource Type Filter Bar
- Customizing System Resource Type Mapping
- Display Document Attributes for CDI Records

## Resource Type Filter Bar

When enabled, a resource-type filter ribbon appears under the basic search box. It allows users to filter the results by resource type.



# Resource Type Filter Bar Configuration

- Configuration > Discovery > Display Configuration > Configure Views > Edit View > Brief Results tab

Resource Types Filters Bar

Enable Filters Bar

1 - 6 of 6

⋮	Active	Code	Name	Search Profile Slots
⋮ 1	<input checked="" type="checkbox"/>	books	sfd	ALL
⋮ 2	<input checked="" type="checkbox"/>	articles	Articles	ALL
⋮ 3	<input checked="" type="checkbox"/>	journals	Journals	ALL
⋮ 4	<input checked="" type="checkbox"/>	images	Images	ALL
⋮ 5	<input checked="" type="checkbox"/>	collections	Collections	ALL
⋮ 6	<input checked="" type="checkbox"/>	videos	Video/Film	ALL

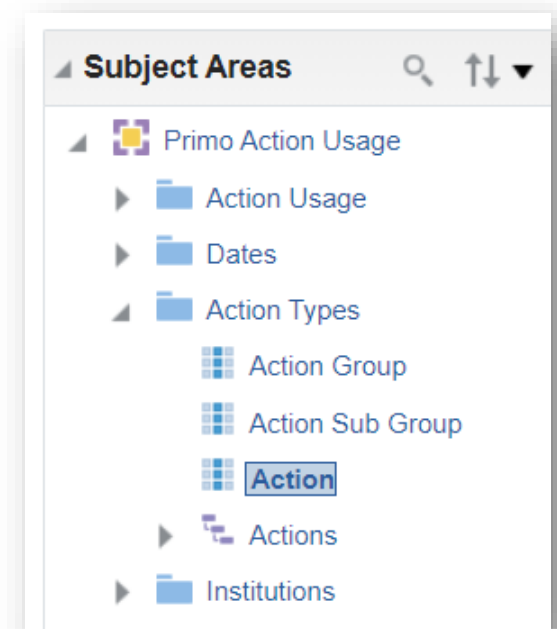
# Resource Type Filter Bar

- Discovery > Display Configuration > Labels

Code Table	Code	Default Label
Results Tile Labels	nui.results.resourcesFiltersBar.All	All
	nui.results.resourcesFiltersBar.More	More
Aria Labels	nui.aria.resourcesFiltersBar.All	View all results retrieved
	nui.aria.resourcesFiltersBar.filter	Click to filter the results to {{filter_name}}
	nui.aria.resourcesFiltersBar.More	Click to see more available filters for your search

# Resource Type Filter Bar Analytics

- Primo Analytics > Action Usage Subject Area
- Actions:
  - Clicking on a resource type filter bar - <1-11>  
User selected All (position 1) or a resource type (position 2-11) in the Resource Type Filter Bar.
  - Clicking on More on the filters bar  
User selected More in the Resource Type Filter Bar



# Customizing System Resource Type Mapping

Customize the mapping of OTB resource types:

- Add conditions
- Reassign mapping conditions from a system resource type to another system resource type (system or local)
- Replace a resource type's conditions completely and change the order of the mapping rules.

Precedence is the following:

1. Local resource types.
2. Customized system resource types
3. Out-of-the box system resource

# Customizing System Resource Type Mapping

- Configuration > Discovery > Display Configuration > Resource types configuration > Add/Edit Resource Type Configuration > System Resource Types tab

The screenshot displays the 'Resource types configuration' interface. At the top, there are two tabs: 'Custom Local Resource Types' and 'System Resource Types', with the latter being selected and highlighted by a purple box. A purple arrow points from this box to a callout window. The callout window shows the 'Resource types configuration' header and the two tabs, with 'System Resource Types' being the active tab. Below the tabs, there are two sections, each containing a list of resource types and a 'No records were found.' message. The first section is labeled 'General' and has a search bar with the placeholder text 'Look-up or select'. The second section is labeled 'Mapping from MARC records' and has a search bar with the placeholder text 'Look-up or select'. The third section is labeled 'Mapping from Dublin Core' and has a search bar with the placeholder text 'Look-up or select'. The list of resource types includes: Journals, Archival materials, Articles, Audio, sdf, sfd, Conference Proceedings, Dissertations, Images, Journals, Kits, Manuscripts, Maps, Newspaper articles, Newspapers, and Other.



# Display Document Attributes for CDI Records

CDI document attributes provide more information about the type of record and complement the existing resource types.

Th 1

- R
- V
- n
- l

ARTICLE  
**Primary Prevention of Cardiovascular Disease with a Mediterranean Diet**  
Estruch, Ramón ; Ros, Emilio ; Salas-Salvadó, Jordi ; Covas, Maria-Isabel ; Corell  
; Gómez-Gracia, Enrique ; Ruiz-Gutiérrez, Valentina ; Fiol, Miquel ; Lapetra, José  
María ; Serra-Majem, Lluís ; Pintó, Xavier ; Basora, Josep ; Muñoz, Miguel Angel ;  
José Alfredo ; Martínez-González, Miguel Angel Waltham, MA: Massachusetts Me  
Recercat ProQuest Central ISSN: 0028-4793 EISSN: 1533-4406 DOI: 10.1056/NEJ  
23432189 CODEN: NEJMAG  
The New England journal of medicine, 2013, Vol.368 (14), p.1279-1290  
“ In a randomized trial, participants assigned to a Mediterranean diet suppleme  
extra-virgin olive oil had a significantly lower rate of cardiovascular events...”  
**RETRACTED PUBLICATION** PEER REVIEWED OPEN ACCESS  
Read Online >  
Full text available >

ARTICLE  
**Large-Artery Stiffness in Health and Disease: JACC State-of-the-Art Review;**  
**Chirinos, Julio A ; Segers, Patrick ; Hughes, Timothy ; Townsend, Raymond**  
Chirinos, Julio A ; Segers, Patrick ; Hughes, Timothy ; Townsend, Raymond  
Journal of the American College of Cardiology, 2019, Vol.74 (9), p.1237-1263  
PEER REVIEWED OPEN ACCESS REVIEW ARTICLE  
Get PDF >  
Available Online >

When enabled, the attributes are displayed as a flag in the brief and full displays of the CDI record.

Users can select the attributes as additional resource types in facets and search queries.

# Display Document Attributes for CDI Records

Use a CDI document attribute code as a local resource type:

- For local data- the local resource type is displayed like any regular resource type.
- For CDI records- it is displayed as a document attribute

For the resource type facet, the behavior is the same:

- For blended searches, both local and CDI records are included in the same facet count
- For local, if the same code is defined as a local resource type, then records with this type are returned.

# Display Document Attributes for CDI Records Configuration

Configuration > Discovery > Display Configuration > Configure Views > Edit View > General Tab

The screenshot shows the 'General Attributes' configuration page. A callout box with a blue checkmark and the text 'Display CDI document attributes' is overlaid on the page. A purple arrow points from the callout box to the 'Display CDI document attributes' checkbox, which is also highlighted with a purple border. Other visible settings include:

- Time-out URL: [Empty field]
- Timeout (in minutes) for signed in users: 30
- Side bar (Tweak my results) position: On the right
- Timeout (in minutes) for guest users: 0
- Default Language: Debug
- Auto Complete Enabled: [Unchecked]
- Enable the 'Personalize Your Results' service: [Checked]
- Display link to Newspapers Search: [Checked]
- Highlight reference entry on top: [Unchecked]
- Use Voice Search: [Checked]
- Use UI supported languages: [Dropdown menu]
- Display online services from other campuses/libraries: [Dropdown menu: None of these]
- Enable recent scopes search: [Unchecked]
- Display Unpaywall Links: [Unchecked]
- Display all links in View Online section: [Unchecked]
- Enable Barcode Search: [Unchecked]

# Display Document Attributes for CDI Records

- Discovery > Display Configuration > Labels

Code Table	Code	Default Label
Facet Resource Type Labels	facets.facet.facet_rtype.review_article	Review Articles
	facets.facet.facet_rtype.primary_source	Primary Sources
	facets.facet.facet_rtype.preprint	Preprints
	facets.facet.facet_rtype.retracted_publication	Retracted Publications
	facets.facet.facet_rtype.withdrawn_publication	Withdrawn Publications
	facets.facet.facet_rtype.retraction_notice	Retraction Notices
	facets.facet.facet_rtype.withdrawal_notice	Withdrawal Notices
	facets.facet.facet_rtype.publication_exp_concern	Publications with Expression of Concern
	facets.facet.facet_rtype.publication_addendum	Publications with Addendum
	facets.facet.facet_rtype.publication_corrigendum	Publications with Corrigendum
Results Tile Labels	attribute.review_article	Review Article
	attribute.review_article_tooltip	A review article presents the current state of the research on a particular topic or research area via the review of primary research on that specific topic
	attribute.primary_source	Primary Source
	attribute.primary_source_tooltip	A primary source provides first-hand testimony or direct evidence concerning a topic under investigation. It contains the actual textual material that is the subject of research

# Resources

# Resources

- [Release Notes](#)
- [Search Operators](#)
- [Alphabetic Sort of Subjects in Record's Full Details](#)
- [Direct Linking](#)
- [Item Display for Primo VE](#)
- [Resource Types for Primo VE](#)
- [CDI Document Attributes](#)

[Release Schedule](#)

 [Download ics file to add the 2023 release dates into your calendar.](#)



# Thank you!

Shira Cohen

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We hope you enjoyed our presentation as much as we did!

**Please fill out this short survey:**



<https://www.surveymonkey.com/r/KTMDJ3M>

#### About Clarivate

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