




## Configuring the View

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## Agenda

- Overview
- General Attributes
- Scopes
- Tabs
- Tiles Configuration
- Deploy
- Exercise

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## Overview

### Views Wizard

- Sets up the View, or Front End, or UX of Primo
- Can have multiple views for one institution
- Only place in Primo that functions as a setup wizard – sequential steps
  - Great for initial setup
  - Not as great for editing
  - Helps remind us there are multiple steps in multiple screens

## Overview – Classic vs New UX

### Classic vs New UX

- Focus today on New UX
- Both UX's exist upon the creation of a view, just have different URLs
- New:  
<http://pstraining.hosted.exlibrisgroup.com/primo-explore/search?vid=TRAINALMA>
- Classic:  
[http://pstraining.hosted.exlibrisgroup.com/primo\\_library/libweb/action/search.do?&vid=TRAINALMA](http://pstraining.hosted.exlibrisgroup.com/primo_library/libweb/action/search.do?&vid=TRAINALMA)

## Overview – DEMO

### Getting to the Views Wizard

- *Primo Back Office > Ongoing Configuration Wizards > Views Wizard*



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## General Attributes - DEMO

- View Name (can be changed)
- View Code (not editable)
- Default user institution
- Is Template/Copied From/Inherits (useful for initial setup)
- Description (seen in Views List)
- Enable My Library Card (in the eShelf)
- Invoke automatic search when tabs are switched
- Enable the Personalize Your Results service
- Default Institution
- Session timeout URL
- Layout set
- CSS
- Mobile CSS
- Default interface language



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## Scopes – DEMO

### Scope List

#### Editing existing scopes

- Scope values
- Remote Quick Sets (MetaLib)
- Deep Search Plugins (Primo Central, EBSCO API)

#### Creating a new scope

## Scopes – DEMO

**Primo Back Office** [About](#) [Logout](#) [Help](#)

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Views Wizard](#)

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#)

ExtLibris Primo  
Hello primoadmin

➤ **Search Scope List**

View : TRABALMA JC

**Search Scope List**

Name	Description	Search Type		
default_scope	Everything	Both	<a href="#">Edit</a>	<a href="#">Delete</a>
ebSCO API	EBSCO API Plugin	Remote	<a href="#">Edit</a>	<a href="#">Delete</a>
library_main	Main Library Scope	Local	<a href="#">Edit</a>	<a href="#">Delete</a>
alma_scope	Local Catalog	Local	<a href="#">Edit</a>	<a href="#">Delete</a>
pc_scope	Primo Central	Remote	<a href="#">Edit</a>	<a href="#">Delete</a>
library_law	Law Library Scope	Local	<a href="#">Edit</a>	<a href="#">Delete</a>
library_health	Health Sciences Library Scope	Local	<a href="#">Edit</a>	<a href="#">Delete</a>
library_all	All Libraries Scope	Local	<a href="#">Edit</a>	<a href="#">Delete</a>
course_reserves	course reserves	Local	<a href="#">Edit</a>	<a href="#">Delete</a>

**Add Search Scope**

Search Scope Name:  Description:  [Add](#)

[go back](#) To Edit View [Continue](#) To View Tabs

*Primo Back Office > Ongoing Configuration > Views Wizard Configuration*

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## Tabs – DEMO

### Order of the tabs

- Order in Views Wizard reflected in display

### Editing existing tabs

- Scopes added to tabs make them visible in the UI

### Creating a new tab

## Tabs – DEMO

**Primo Back Office** [About](#) [Logout](#) [Help](#)

[Primo Home](#) > [Ongoing Configuration Wizards](#) > [Views Wizard](#)

[Home](#) [Deploy & Utilities](#) [General](#) [Local Data](#) [Publishing](#) [FE & Delivery](#) [Search Engine](#)

ExLibris **Primo**  
Hello: primoadmin

### Tabs Configuration

View : TRAINALMA\_JC

**Tab List for View TRAINALMA\_JC**

No.	Tab Code	Description			
1	default_tab	By Data Source	<a href="#">Edit</a>	<a href="#">Delete</a>	⬆
2	library_tab	By Library	<a href="#">Edit</a>	<a href="#">Delete</a>	⬆
3	course_reserves_tab	By Collection	<a href="#">Edit</a>	<a href="#">Delete</a>	⬆

**Create a New Tab**

Tab Code:  Description:  [Create](#)

[go back](#) [Continue](#)

To Scopes List To Tab List



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## Tiles Configuration – DEMO

- Home Page
- Full Display
- Brief Display




## Tiles Configuration – Home Page – DEMO

### Basic Search

- Opening and closing text (add text here)
- Resource type pre-filter
- Search operators
- Search Target Fields

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## Tiles Configuration – Home Page – DEMO

### Advanced Search

- Opening and closing text
- Define Search Pre-filters (edit a complex search line and the material type)
- Find Database link (MetaLib)

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## Tiles Configuration – Home Page – DEMO

### Main Menu

- Links (A-Z out of the box, Help (not here))
- Adding/Removing links
- Current window/new tab option

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## Tiles Configuration – Home Page – DEMO

### Static HTML

- Refers to the HTML files we'll be covering in the next section

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## Tiles Configuration – Full Display – DEMO

### Full Results


- Fields to display (Details tab)
- Local Fields and Normalization rules
- Links to display in full results
- Normalization Rules

**Send to** (see Primo Technical Guide for configuration)

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## Tiles Configuration – Brief Display – DEMO

- Brief Results
- Include e-shelf option
- Texts of Brief Results Title
- Define link from title
- Define FRBR
- Order of Tabs
- Field to display in X line of brief results
- Sort Fields (FRBR default)
- Snippet Display Options
- Institution Boost


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## Tiles Configuration – Brief Display – DEMO

### Refine My Results

- Opening and ending text for facet labels
- Additional functionalities
- Facets to display (nodes, sorting, tabs)

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## Tiles Configuration – Brief Display – DEMO

### Locations

- Real Time Availability
- Sorting and including locations (non-Alma)
- Display item list filters (non-Alma)

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## Deploying in Primo – DEMO

- Deploy from Views Wizard
- Monitoring Deploy Process
- Deploy All



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## Exercise #6

### Create and customize a new view

- Create a new view for your institution
- Customize view
- Deploy and test in the Front End

*See handout for step-by-step instructions*