



- 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

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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/primoexplore/search?vid=TRAINALMA

Classic:

http://pstraining.hosted.exlibrisgroup.com/primo_library/libweb/action/search.do?&vid=TRAINALMA

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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

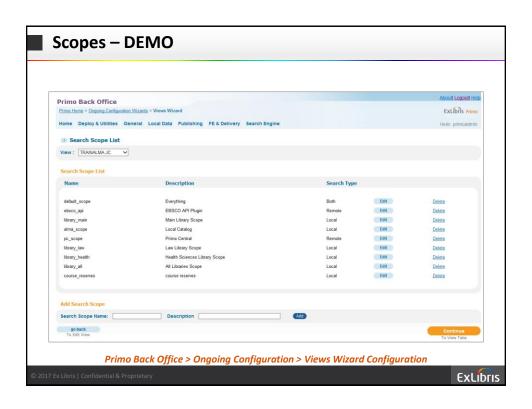
Scope List

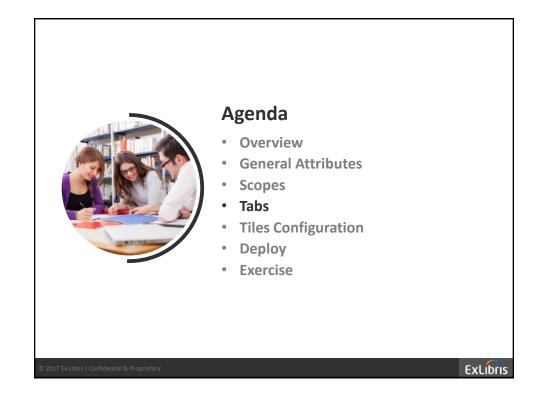
Editing existing scopes

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

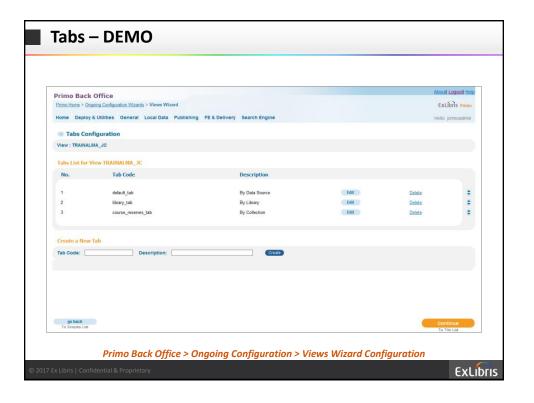
Creating a new scope

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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 Description: Creating a new tab





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Tiles Configuration – DEMO

- Home Page
- Full Display
- Brief Display

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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

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