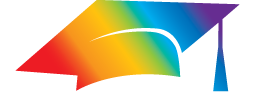
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**Primo Administration**

**Views**Hands-on Exercise

**Learning Objectives**

To access and view the Views Wizard for your institution, and see the configurations that are possible there.

By the end of this exercise, you will be able to:

* Access the Views List
* See the configurations for your institution’s view

**Requirements**

To complete this exercise, you will need to have a Super Admin or Admin level password to your configured Primo Sandbox Environment.

Your Primo Sandbox will need to have the following configurations for this exercise:

Your Primo Sandbox will need to have the following configurations for this exercise:

* Your Institution created
* Data source for your ILS created
* Normalization rule configured for your catalog data
* Pipe created and run at least once for your library catalog data
* View created for your institution
* Access to the Front End of your view and data visible

**General Instructions**

This exercise accompanies the **Primo Administration: Views** training session. For help with the exercise, go to the training’s launch page where you can review the presentation, download the presentation **Handout**, and find links to **Recommended Articles** in the Knowledge Center.

Please use your library’s **Primo Sandbox Environment** to complete this exercise. Note that you will not be making changes to your Sandbox Environment, only viewing default settings and configurations that have already been made.

**The Activity**

|  |  |
| --- | --- |
| **Access the View for your institution** | |
| 1. **Log into the Primo Back Office** | |
| 1. **Go to *Ongoing Configuration Wizards > Views Wizard***   **OR**  ***FE & Delivery > Views List* in the top navigation** |  |
| 1. **Click Edit to see your institutions view.**   **Note that while we are not editing the wizard, we must step through several screens to see what is configured.**  ***If you make a change to any of the settings on the screen, do not click Save!***  **Instead, click on the Primo Home link at the top of the page and begin the exercise again. This will ensure that none of the changes will be saved.** |  |
| 1. **Review the settings in the General Attributes screen.** 2. ***Without making any changes*, click *Save & Continue* at the bottom of the screen** |  |
| 1. **Review the scopes listed in the Search Scope List.** 2. ***Edit* one of the scopes** |  |
| 1. **Note the Scope Values available.** 2. **Scroll down and review the Deep Search Plugins section as well.** 3. **Click *Cancel & Go Back* to return to the Scopes List** |  |
| 1. ***Without making any changes*, Click *Continue* to View Tabs** |  |
| 1. **Click *Edit* to see how one of the tabs is configured.** |  |
| 1. **Note that at least one scope is already on the tab.** 2. ***Cancel & Go Back* to Tabs List** |  |
| 1. ***Without making any changes*, *Continue* to Tiles List** |  |
| 1. **Note that the Tiles Configuration contains multiple pages.** 2. **Use the dropdown to select Home Page, Full Display, and Brief Display.** 3. **Note the pages within each tile. Feel free to edit pages of interest, but be sure not to change any of the settings.** |  |
| 1. ***Without making any changes, Continue* to Deploy** |  |
| 1. **Note that if you were editing the view, you would need to Deploy it for the changes to take effect.** 2. **Click on the Go Back button or the Primo Home link at the top of the screen to exit the View without deploying it.** |  |
| **Test View in Primo Front End** | |
| 1. **Go to your view in the Primo Front End; note that YOURVIEWCODE will match the view Code in the Views List:**   e.g. <http://yourinstitution.hosted.exlibrisgroup.com/primo-explore/search?vid=YOURVIEWCODE> | |
| 1. **Conduct a search** | |