**Primo VE Check List**

**Objective**

The objective of this checklist is to assess the progress of the Primo VE deployment process in your institution by verifying that all relevant activities are functioning properly.

***Note:*** Some items in this list may not be relevant for your institution.

An asterisk (\*) Indicates that the check may involve an external integration.

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| **Primo VE UI Checks** | | | | |
| **Home Page** | **Yes** | **No** | **NA** | **Comments** |
| Home page – Verify that it displays correctly and all its links work correctly for each browser (Chrome, FF, and Edge) |  |  |  |  |
| Main Menu – Verify that all links work as expected |  |  |  |  |
| If using an interface in multiple languages, verify that the display changes when changing a language |  |  |  |  |
| Check to see that the Library names appear correctly and in the correct languages |  |  |  |  |
| Select Advanced Search to see that it displays properly with all the relevant parameters (*close it once done*) |  |  |  |  |
| Type a search in the basic search box to see that auto-complete works and the correct Slot names appear (*if configured*) |  |  |  |  |
| Perform a search and verify that Slot and Search Profile drop-down menus appear next to the search button and that that they return expected results |  |  |  |  |
| Verify that you can scroll up and down the search results |  |  |  |  |
| Verify that the facets display correctly |  |  |  |  |
| Filter the results using the facets to see that they filter results correctly |  |  |  |  |
| Change the 'Sort By' option to see that each type of search works correctly |  |  |  |  |
| **Full Display & Item Actions** | **Yes** | **No** | **NA** | **Comments** |
| Select the 3 dots icon (actions) of a record to see that all the relevant actions are displayed and working as expected |  |  |  |  |
| Select a record’s Pin icon to see that its appearance is changed (added to the e-shelf) |  |  |  |  |
| Select the Pin icon at the top right of the screen to verify that the record has been saved to My Favorites and that you can select it to view the record’s full details |  |  |  |  |
| Remove the pin to see that the item is removed from My Favorites (e-shelf) |  |  |  |  |
| Go back to the search results to see that the item is no longer pinned |  |  |  |  |
| For an electronic record, select the View online link to see that it displays the full text |  |  |  |  |
| For an electronic record, check that you can see public notes and license (*if configured*) |  |  |  |  |
| Select a physical record to see that the locations and items appear in the Get It section |  |  |  |  |
| **Login & Library Card** | **Yes** | **No** | **NA** | **Comments** |
| Select **Sign in** to see that the login page displays correctly |  |  |  |  |
| Log on with a user to see that authentication is working properly |  |  |  |  |
| Select a physical record to see that you request an item (when relevant) |  |  |  |  |
| Select the username label at the top-right corner and select My Library Card to see that the page displays correctly |  |  |  |  |
| In My Library Card check to see that all relevant information is displayed (such as loans, requests, fines, notes, personal data, and so forth) |  |  |  |  |
| Check to see that you can change your personal information (such as language interface, address, phone number, and so forth) |  |  |  |  |
| Select the Pin icon at the top right of the screen to open My Favorites (e-shelves). Verify that you can add and remove labels to the items, as well as filter them according to the label |  |  |  |  |
| Select an item in My Favorites to verify that you can see the record’s full details, all the relevant links, and an option to request a physical item |  |  |  |  |
| Select the username label at the top-right corner and select **SIGN OUT** to verify that the user logs out correctly |  |  |  |  |
| **Mobile Devices** | **Yes** | **No** | **NA** | **Comments** |
| Verify that the home page is displayed well and that all content is visible and accessible (including the Main menu links) |  |  |  |  |
| Change the language displayed in a mobile device to see that the labels change accordingly (if relevant) |  |  |  |  |
| Perform a search to see that you can see the results well |  |  |  |  |
| Check to see that it is possible to select an item to view its full details and other links |  |  |  |  |
| Verify that you can scroll up and down the search results |  |  |  |  |
| Make a second search to see that you get different results and that you can select records and view online links |  |  |  |  |
| Sign in to see that authentication works correctly |  |  |  |  |
| Verify that My Library Card displays correctly and that you can edit your personal information |  |  |  |  |
| Check to see that you can view the 'My Favorites' (Pin) and that you can select an item to see its full display |  |  |  |  |
| Sign out to see that the user signs out correctly |  |  |  |  |

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| **Primo VE Configuration** | | | | |
| **Discovery tab** | **Yes** | **No** | **NA** | **Comments** |
| Select “go to view” to see that you get the correct URL |  |  |  |  |
| Upload a customization package |  |  |  |  |
| Change the facet order and verify that it has been updated in the view |  |  |  |  |
| Change any label and verify that it has been updated in the view |  |  |  |  |