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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

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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

---

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 shows a library search interface. At the top, there are two tabs: 'SEARCH CRITERIA' and 'BARCODE SEARCH' (which is selected and highlighted with a red box). To the right of these tabs is a 'SIMPLE SEARCH' link. Below the tabs is a search input field containing the barcode number '39031025546128'. To the right of the input field are a clear button (X) and a search button with a magnifying glass icon and the text 'SEARCH'. Below the search bar, the search results for a video titled 'The brain' are displayed. The video cover image shows a person's head in profile. The title 'The brain' is in bold. Below the title, the authors are listed: 'Bennett, Thomas L.; Butler, Michelle.; Page, George (George H.); Vattano, Frank J.; Annenberg/CPB Project.; Colorado State University. Office of Instructional Services.' The year 'c2002' is also shown. A green icon of a book with a checkmark is next to the text 'Available at O'Media 7 day (QP376 .B695 2002) >'. Below the search results, there are several options: 'TOP', 'SEND TO' (with a dropdown arrow), 'GET IT', 'GET IT FROM OT...', and 'DETAILS'. Under 'SEND TO', there are icons for 'EXPORT BIBTEX', 'EXPORT RIS', 'EASYBIB', 'ENDNOTE', 'REFWORKS', 'PRINT', and 'CITATION'. Under 'GET IT', there are icons for 'PERMALINK' and 'EMAIL'.



# Barcode Search Configuration

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

General Attributes

Time-out URL	<input type="text"/>	Timeout (in minutes) for guest users *	<input type="text" value="5"/>
Timeout (in minutes) for signed in users *	<input type="text" value="30"/>	Default Language *	<input type="text" value="English"/>
Side bar (Tweak my results) position	<input type="text" value="On the right"/>	Auto Complete Enabled	<input checked="" type="checkbox"/>
Select as Default View	<input type="checkbox"/>	Enable the 'Personalize Your Results' service	<input checked="" type="checkbox"/>
Enable Collection Discovery Features	<input checked="" type="checkbox"/>	Display link to Newspapers Search	<input checked="" type="checkbox"/>
Highlight reference entry on top	<input type="checkbox"/>	Related records display	<input checked="" type="checkbox"/>
Use Voice Search	<input checked="" type="checkbox"/>	Enable Edit My Library Card	<input checked="" type="checkbox"/>
	<input type="text" value="Use UI supported languages"/>	Enable recent scopes search	<input type="checkbox"/>
Set focus on search box	<input type="checkbox"/>	Display Unpaywall Links	<input type="checkbox"/>
Enable QR On Top	<input checked="" type="checkbox"/>	Display all links in View Online section	<input type="checkbox"/>
Display Quick Links	<input checked="" type="checkbox"/>	Enable Barcode Search	<input checked="" type="checkbox"/>
Display Favorites Warning Message for Guests	<input checked="" type="checkbox"/>		

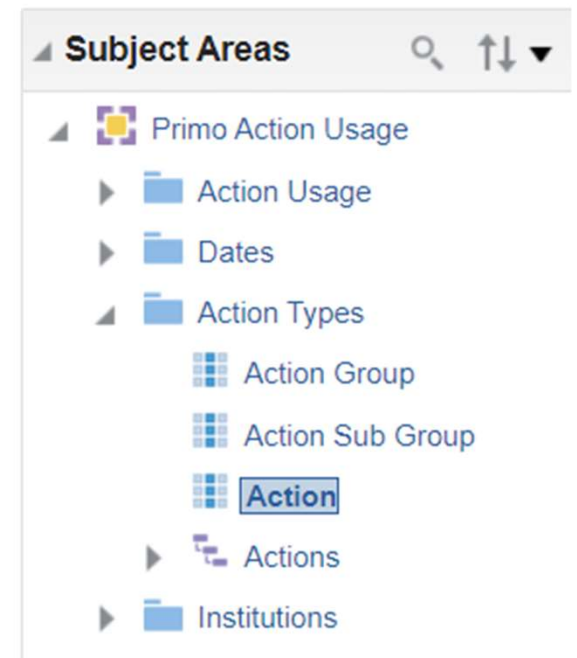
# Barcode Search

- 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

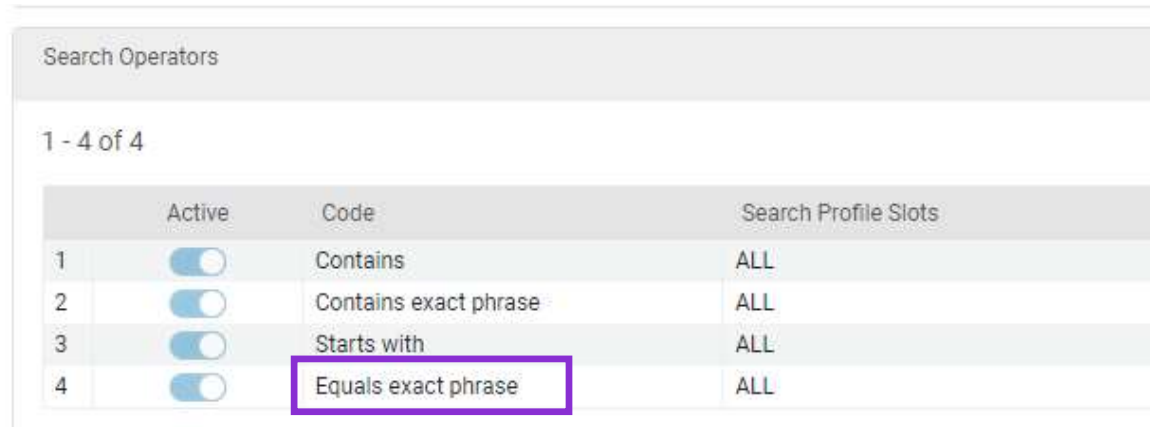
- Equals exact phrase = returns results that contain **only** the exact phrase.
- Contains exact phrase = returns results that **include** the exact phrase, but could also contain other words

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** showing 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 for combining search terms.
- + ADD A NEW** button for adding additional search criteria.
- SEARCH** button at the bottom right.

## 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



	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 > Discovery  
Search Operator Column:

Details	
Title	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
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.

ARTICLE  
“The Master of ...”: creating names for art history and the art market  
Oosterlinck, Kim ; Radermecker, Anne-Sophie  
Journal of cultural economics, 2019, Vol.43 (1), p.57-95  
“...? This paper contributes to the understanding of art valuation and art brands on the auction market...”  
PEER REVIEWED

Available Online > Enabled: Direct link to provider

TOP  
SEND TO  
VIEW ONLINE  
DETAILS  
TAGS  
LINKS  
CITATIONS

Send to

READING LIST EXPORT TO EXCEL MENDELEY QR EXPORT BIBTEX EXPORT RIS  
EASYBIB ENDNOTE REWORKS PRINT CITATION PERMALINK  
EMAIL

View Online Disabled: Link to View Online

Full text availability

ProQuest Pharma Collection New Platform  
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 GetIt

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 screenshot displays the Alma Physical Item Editor interface. On the left, the 'Get It' sidebar shows item details for 'Biology Library' with the status 'Available' and 'Item policy: Four Day Loan' highlighted in a red box. The main editor window has tabs for 'General', 'ENUM/CHRON', 'Notes', and 'History'. The 'General Information' section contains various fields, with 'Item policy' set to 'One Week Loan' and highlighted in a red box. 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).

# 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

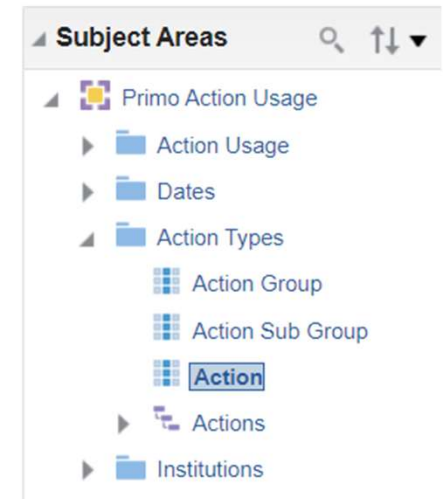
## Resource Type Filter Bar

- 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

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

The screenshot displays the 'Resource types configuration' window. At the top, there are 'Cancel' and 'Save' buttons. Below the title bar, there are two tabs: 'Custom Local Resource Types' and 'System Resource Types', with the latter being selected and highlighted by a purple box. The main content area is divided into three sections: 'General', 'Mapping from MARC records', and 'Mapping from Dublin Core'. The 'General' section contains a 'Resource Type' dropdown menu with a search icon and the text 'Look-up or select'. Below this dropdown is a list of resource types: Journals, Archival materials, Articles, Audio, sdaF, sfd, Conference Proceedings, Dissertations, Images, Journals, Kits, Manuscripts, Maps, Newspaper articles, Newspapers, and Other. To the right of the dropdown are two checkboxes: 'Active' (unchecked) and 'Replace existing rules' (unchecked). The 'Mapping from MARC records' and 'Mapping from Dublin Core' sections each contain a search icon and the text 'No records were found.'.



## Display Document Attributes for CDI Records

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

Th <sup>1</sup>

- 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  
Maria ; 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 the rtype facet 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 rtype 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. The 'Display CDI document attributes' checkbox is checked and highlighted with a red box. Other settings include: Timeout (in minutes) for signed in users: 30; Side bar (Tweak my results) position: On the right; Enable Collection Discovery Features: checked; Newspapers Search Filter By Availability: checked; Related records display: checked; Enable Edit My Library Card: checked; Enable QR On Top: checked; Display Favorites Warning Message for Guests: checked; 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: Use UI supported languages; Display online services from other campuses/libraries: unchecked; 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_corrigenum	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!

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