

# Primo VE Cookbook

This document contains links to existing documentation and other resources about Primo VE configuration, as well as suggestions for troubleshooting and testing in Primo VE.

If you have any questions about VE that are not answered here or cannot access a link in this document, please [email Lori Hilterbrand](#) and [Tamara Marnell](#), or the current chairs of [the Systems Team](#) and [Primo Release Testing Standing Group](#).

This document is Alliance-specific and should not be shared with non-Alliance institutions. Unless otherwise noted, the links to documentation and other resources are fine to share.

If you have questions or content you would like to see in this document, [please fill out this google form](#).

## Table of Contents

### [Primo VE Cookbook](#)

#### [Table of Contents](#)

#### [Migration to Primo VE / General Resources](#)

##### [Existing Documentation](#)

##### [Troubleshooting](#)

##### [Quick Links](#)

#### [Testing Guidelines](#)

##### [Existing Documentation](#)

##### [Troubleshooting](#)

##### [Quick Links](#)

#### [View Settings in Primo VE](#)

##### [Existing Documentation](#)

##### [Troubleshooting](#)

##### [Quick Links](#)

#### [Authentication](#)

##### [Existing Documentation](#)

##### [Troubleshooting](#)

##### [Quick Links](#)

#### [Search Scopes](#)

##### [Existing Documentation](#)

##### [Troubleshooting](#)

##### [Quick Links](#)

#### [Local fields](#)

##### [Existing Documentation](#)

[Troubleshooting](#)

[Quick Links](#)

[Local resource types](#)

[Existing Documentation](#)

[Troubleshooting](#)

[Quick Links](#)

[External data sources](#)

[Existing Documentation](#)

[Troubleshooting](#)

[Quick Links](#)

[Etc.](#)

[Resource type icons](#)

[Citation Styles](#)

[Disabling “Search for articles within a journal”](#)

[Disabling request options from other libraries](#)

[Boosting results](#)

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## Migration to Primo VE / General Resources

### Existing Documentation

- [FAQs from existing Primo customers](#)
- [Deep link redirection](#)
- [Primo VE certification](#)
- [Network Zone resources](#) (requires BaseCamp login)

### Troubleshooting

### Quick Links

- [BaseCamp for migration-related questions and answers](#) (Alliance only)
  - [Go VE tracking](#) (Alliance only)
  - [Updating Permalinks for Redirection at Go-Live](#)
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# Testing Guidelines

## Existing Documentation

- “What’s on by default?” list
- Setting up a Testing View in Primo VE
- What you can’t (or shouldn’t) test in VE
- Premium VS non-premium sandbox and when/how to use each (more important after we go live in June)
  - Instructions on how to get premium sandbox access

## Troubleshooting

## Quick Links

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# View Settings in Primo VE

## Existing Documentation

- Check mapping and code tables
- Recreate Alma mashup style

## Troubleshooting

- Changing paths in customizations?

## Quick Links

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# Authentication

## Existing Documentation

## Troubleshooting

## Quick Links

- [Steps to create new SAML profile for Primo VE](#): An example from OHSU of how to set up a SAML profile for an institution's new CNAME URL for Alma and Primo VE. ([Video](#), 1 hour)
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## Search Scopes

### Existing Documentation

- Testing NZ, CDI, and other scopes

### Troubleshooting

## Quick Links

- [Creating a Summit Custom Data Scope in Primo VE](#): Document for setting up NZ and IZ custom data scopes in VE.
  - [Boosting results](#): Section at the bottom of this document about how to boost certain fields, resource types, etc. in search results
  - [Setting up search scopes at Willamette](#): This is an evolving document on how we set up our search scopes and profiles.
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## Local fields

### Existing Documentation

- [Dedup/FRBR: PBO vs. VE](#) (Alliance only)
- [Working with NRSG Local Display Fields in Primo VE](#) (NRSG)

### Troubleshooting

## Quick Links

- [Primo VE Local Fields - Search and Facet Norm Rule Configuration](#) (Alliance only)
- NRSG's [GitHub repository](#) with list of rules

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## Local resource types

### Existing Documentation

- [Working with Local Resource Types in Primo VE](#) (NRSG)

### Troubleshooting

### Quick Links

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## External data sources

### Existing Documentation

- [Configuring import profiles for Primo VE](#)

### Troubleshooting

### Quick Links

- [How to add Archives West as an external data source to Primo VE](#)
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Etc.

### Resource type icons

Trying to maintain a list here of new resource type icons that will need to be created, and old ones that can be removed, feel free to edit: [icon list](#)

### Citation Styles

Ex Libris Documentation: [Managing Citation Styles for Primo VE](#)

Thanks to Stacey van Groll (University of Queensland) for wrangling all of these into one convenient list.

Position	Label	Source Code	Source code link
1	APA (7th ed)	apa	<a href="https://github.com/citation-style-language/styles/blob/master/apa.csl">https://github.com/citation-style-language/styles/blob/master/apa.csl</a>
2	Chicago Notes/Bibliography (17th ed)	chicago-note-bibliography	<a href="https://github.com/citation-style-language/styles/blob/master/chicago-note-bibliography.csl">https://github.com/citation-style-language/styles/blob/master/chicago-note-bibliography.csl</a>
3	UQ Harvard	style-manual-australian-government	<a href="https://github.com/citation-style-language/styles/blob/master/style-manual-australian-government.csl">https://github.com/citation-style-language/styles/blob/master/style-manual-australian-government.csl</a>
4	MLA (8th ed)	modern-language-association-8th-edition	<a href="https://github.com/citation-style-language/styles/blob/79a5d9c4b65a995b3922f2e673a7223c1bc5b7bc/modern-language-association-8th-edition.csl">https://github.com/citation-style-language/styles/blob/79a5d9c4b65a995b3922f2e673a7223c1bc5b7bc/modern-language-association-8th-edition.csl</a>
5	MLA (9th ed)	mla	<a href="https://github.com/citation-style-language/styles/blob/master/modern-language-association.csl">https://github.com/citation-style-language/styles/blob/master/modern-language-association.csl</a>
6	Chicago Author/Date (17th ed)	chicago-author-date	<a href="https://github.com/citation-style-language/styles/blob/master/chicago-author-date.csl">https://github.com/citation-style-language/styles/blob/master/chicago-author-date.csl</a>
7	Vancouver	vancouver	<a href="https://github.com/citation-style-language/styles/blob/master/vancouver.csl">https://github.com/citation-style-language/styles/blob/master/vancouver.csl</a>
8	ACS	american-chemical-society	<a href="https://github.com/citation-style-language/styles/blob/master/american-chemical-society.csl">https://github.com/citation-style-language/styles/blob/master/american-chemical-society.csl</a>
9	ADJ	australian-dental-journal	<a href="https://github.com/citation-style-language/styles/blob/master/australian-dental-journal.csl">https://github.com/citation-style-language/styles/blob/master/australian-dental-journal.csl</a>
10	AGLC	australian-guide-to-legal-citation	<a href="https://github.com/citation-style-language/styles/blob/master/australian-guide-to-legal-citation.csl">https://github.com/citation-style-language/styles/blob/master/australian-guide-to-legal-citation.csl</a>
11	AMA	american-medical-association	<a href="https://github.com/citation-style-language/styles/blob/master/american-medical-association.csl">https://github.com/citation-style-language/styles/blob/master/american-medical-association.csl</a>
12	AMJ	academy-of-management-review	<a href="https://github.com/citation-style-language/styles/blob/master/academy-of-management-review.csl">https://github.com/citation-style-language/styles/blob/master/academy-of-management-review.csl</a>

13	AVJ	australian-veterinary-journal	<a href="https://github.com/citation-style-language/styles/blob/master/australian-veterinary-journal.csl">https://github.com/citation-style-language/styles/blob/master/australian-veterinary-journal.csl</a>
14	CSE	council-of-science-editors	<a href="https://github.com/citation-style-language/styles/blob/master/council-of-science-editors.csl">https://github.com/citation-style-language/styles/blob/master/council-of-science-editors.csl</a>
15	IEEE	ieee	<a href="https://github.com/citation-style-language/styles/blob/master/ieee.csl">https://github.com/citation-style-language/styles/blob/master/ieee.csl</a>

## Disabling “Search for articles within a journal”

- deactivate the ISSN index under Advanced Search Configuration or Or remove with CSS:

```
#searchWithinJournal {
    display: none;
}
```

## Disabling request options from other libraries

Within the other libraries section of full record displays, any GESs those other libraries set up to show without logging in will display above the holdings. These can be hidden with CSS:

```
prm-alma-other-members prm-request-services {
    display: none;
}
```

## Boosting results

To boost certain fields, resource types, or institution holdings to the top of search results, adjust the entries on the Ranking Configuration screen. See [Configuring the Ranking of Search Results in Primo VE](#).

To boost articles in a blended search profile, boost the CDI scope relative to the Alma records. Go to your search profile, click on the 3 dots, and select Configure Blending. (Screenshots below from Blake Galbreath at WSU.)

ID	Name	Process and Descriptions	Local Data	Process and Descriptions	
16	WSU_everything	Articles, Books, and More	Blended	CI, IZ_Electronic, IZ_Physical, NZ_Electronic, NZ_Physical	...
17	WSU_MASC_ALL	MASC Digital and Physical Collections	Local Data	MASC Digital and Physical Co	View
18	WSU_MASC_CDM	MASC Digital Collections	Local Data	MASC Digital Collections	Edit
19	WSU_MASC_PRINT	MASC Physical Collections	Local Data	MASC Physical Collections	Delete
					Configure blending

Edit the Central Index. For example:

Blending\_Central\_Index - Boost 2000, Medium, 5, Top

Blending\_Local - Boost 2.5, Medium, 5, Top

Define Boost Type

Choose boost type:
☒ Boost
☐ Deboost

Define Parameters

Boost factor

Boost records with a score:
☐ high
☒ medium
☐ low
☐ none

Position of boosted records
☒ top (2nd record)
☐ middle (5th record)
☐ bottom (9th record)
☐ none

Number of results to boost

The [Boosting, Blending, and Brouhaha](#) spreadsheet shows different Alliance libraries' settings.