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, <u>please fill out this google form</u>.

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

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

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)
 - o Instructions on how to get premium sandbox access

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Quick Links

View Settings in Primo VE

Existing Documentation

- Check mapping and code tables
- Recreate Alma mashup style

Troubleshooting

Changing paths in customizations?

Quick Links

Authentication

Existing Documentation

Troubleshooting

Quick Links

 <u>Steps to create new SAML profile for Primo VE</u>: An example from OHSU of how to set up a SAML profile for an institution's new CNAME URL for Alma and Primo VE. (<u>Video</u>, 1 hour)

Search Scopes

Existing Documentation

Testing NZ, CDI, and other scopes

Troubleshooting

Quick Links

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

Local fields

Existing Documentation

- <u>Dedup/FRBR: PBO vs. VE</u> (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 <u>GitHub repository</u> with list of rules

Local resource types

Existing Documentation

• Working with Local Resource Types in Primo VE (NRSG)

Troubleshooting

Quick Links

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

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: <u>icon list</u>

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	https://github.com/citation-style-languag e/styles/blob/master/apa.csl
2	Chicago Notes/Bibliogra phy (17th ed)	chicago-note- bibliography	https://github.com/citation-style-languag e/styles/blob/master/chicago-note-biblio graphy.csl
3	UQ Harvard	style-manual-australian- government	https://github.com/citation-style-languag e/styles/blob/master/style-manual-austr alian-government.csl
4	MLA (8th ed)	modern-language- association-8th-edition	https://github.com/citation-style-languag e/styles/blob/79a5d9c4b65a995b3922f2 e673a7223c1bc5b7bc/modern-languag e-association-8th-edition.csl
5	MLA (9th ed)	mla	https://github.com/citation-style-languag e/styles/blob/master/modern-language-a ssociation.csl
6	Chicago Author/Date (17th ed)	chicago-author-date	https://github.com/citation-style-languag e/styles/blob/master/chicago-author-dat e.csl
7	Vancouver	vancouver	https://github.com/citation-style-languag e/styles/blob/master/vancouver.csl
8	ACS	american-chemical- society	https://github.com/citation-style-languag e/styles/blob/master/american-chemical- society.csl
9	ADJ	australian-dental-journal	https://github.com/citation-style-languag e/styles/blob/master/australian-dental-jo urnal.csl
10	AGLC	australian-guide-to- legal-citation	https://github.com/citation-style-languag e/styles/blob/master/australian-guide-to- legal-citation.csl
11	AMA	american-medical-association	https://github.com/citation-style-languag e/styles/blob/master/american-medical- association.csl
12	AMJ	academy-of- management-review	https://github.com/citation-style-languag e/styles/blob/master/academy-of-manag ement-review.csl

13	AVJ	australian-veterinary- journal	https://github.com/citation-style-languag e/styles/blob/master/australian-veterinar y-journal.csl
14	CSE	council-of-science- editors	https://github.com/citation-style-languag e/styles/blob/master/council-of-science- editors.csl
15	IEEE	ieee	https://github.com/citation-style-languag e/styles/blob/master/ieee.csl

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

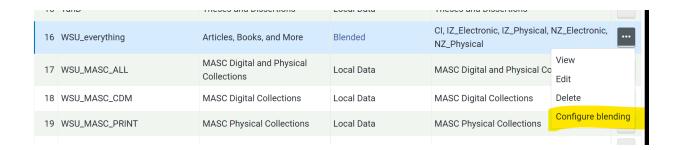
Within the other libraries section of full record displays, any GESs those other libraries set up to show without logging in will display above the holdings. These can be hidden with CSS:

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

Boosting results

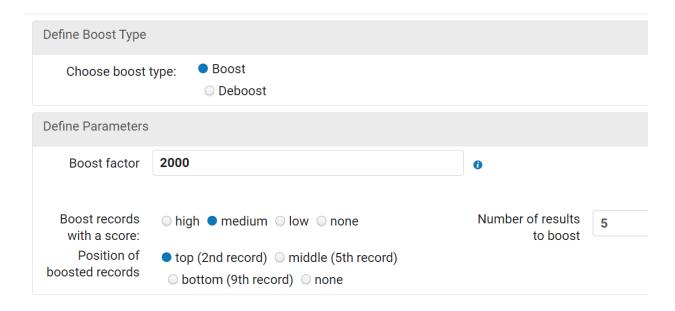
To boost certain fields, resource types, or institution holdings to the top of search results, adjust the entries on the Ranking Configuration screen. See <u>Configuring the Ranking of Search</u> <u>Results in Primo VE</u>.

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.)



Edit the Central Index. For example:

Blending_Central_Index - Boost 2000, Medium, 5, Top Blending_Local - Boost 2.5, Medium, 5, Top



The <u>Boosting</u>, <u>Blending</u>, <u>and Brouhaha</u> spreadsheet shows different Alliance libraries' settings.