Configuring the View

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Agenda
- Overview
- General Attributes
- Scopes
- Tabs
- Tiles Configuration
- Deploy
- Exercise
Overview

Views Wizard
- Sets up the View, or Front End, or UX of Primo
- Can have multiple views for one institution
- Only place in Primo that functions as a setup wizard – sequential steps
  - Great for initial setup
  - Not as great for editing
  - Helps remind us there are multiple steps in multiple screens
Overview – Classic vs New UX

Classic vs New UX
• Focus today on New UX
• Both UX’s exist upon the creation of a view, just have different URLs
• New:
  http://pstraining.hosted.exlibrisgroup.com/primo-explore/search?vid=TRAINALMA
• Classic:
  http://pstraining.hosted.exlibrisgroup.com/primo_library/libweb/action/search.do?&vid=TRAINALMA

Overview – DEMO

Getting to the Views Wizard
• Primo Back Office > Ongoing Configuration Wizards > Views Wizard
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General Attributes - DEMO

- View Name (can be changed)
- View Code (not editable)
- Default user institution
- Is Template/Copied From/Inherits (useful for initial setup)
- Description (seen in Views List)
- Enable My Library Card (in the eShelf)
- Invoke automatic search when tabs are switched
- Enable the Personalize Your Results service
- Default Institution
- Session timeout URL
- Layout set
- CSS
- Mobile CSS
- Default interface language
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Scopes – DEMO

Scope List

Editing existing scopes
• Scope values
• Remote Quick Sets (MetaLib)
• Deep Search Plugins (Primo Central, EBSCO API)

Creating a new scope
Scopes – DEMO

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Tabs – DEMO

Order of the tabs
- Order in Views Wizard reflected in display

Editing existing tabs
- Scopes added to tabs make them visible in the UI

Creating a new tab
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Tiles Configuration – DEMO

- Home Page
- Full Display
- Brief Display
Tiles Configuration – Home Page – DEMO

**Basic Search**
- Opening and closing text (add text here)
- Resource type pre-filter
- Search operators
- Search Target Fields

Tiles Configuration – Home Page – DEMO

**Advanced Search**
- Opening and closing text
- Define Search Pre-filters (edit a complex search line and the material type)
- Find Database link (MetaLib)
Main Menu
- Links (A-Z out of the box, Help (not here))
- Adding/Removing links
- Current window/new tab option

Static HTML
- Refers to the HTML files we’ll be covering in the next section
Tiles Configuration – Full Display – DEMO

Full Results
• Fields to display (Details tab)
• Local Fields and Normalization rules
• Links to display in full results
• Normalization Rules

Send to (see Primo Technical Guide for configuration)

Tiles Configuration – Brief Display – DEMO

• Brief Results
• Include e-shelf option
• Texts of Brief Results Title
• Define link from title
• Define FRBR
• Order of Tabs
• Field to display in X line of brief results
• Sort Fields (FRBR default)
• Snippet Display Options
• Institution Boost
Tiles Configuration – Brief Display – DEMO

Refine My Results
• Opening and ending text for facet labels
• Additional functionalities
• Facets to display (nodes, sorting, tabs)

Locations
• Real Time Availability
• Sorting and including locations (non-Alma)
• Display item list filters (non-Alma)
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Deploying in Primo – DEMO

- Deploy from Views Wizard
- Monitoring Deploy Process
- Deploy All
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Exercise #6

Create and customize a new view

- Create a new view for your institution
- Customize view
- Deploy and test in the Front End

See handout for step-by-step instructions