

Finding Primo Customization Ideas to "Borrow": A Time-Honored Path toward Progress

Drew Parker, Systems Librarian, Brandeis University /
Primo Working Group

Objectives

- Assess the alternatives for finding JavaScript customizations to implement in your Primo environments
 - Can we improve on these?
- An alternative for testing Primo customizations
- Highlight a few customizations along the way that were popular at Brandeis
- Get feedback on how we can better feature existing customization work
- Advocate for the benefits of going through a similar process

Background: Discovery Working Group

- Formed at the beginning of 2021 with representatives from Metadata, Electronic Resources, Metadata, Reference and Instruction, Archives and Special Collections and Library Systems
- Found myself in the position of wanting to do JavaScript customization without a lot of time to devote to it
 - Brandeis is a medium-sized research library with a medium-sized staff
 - There's no Web Services position at Brandeis and our developer is focused on other projects
 - I don't have that much AngularJS experience

Obvious idea: Making use of existing customizations

- Find customizations from different places, bring them to group, implement those we want
- But how best to find the customizations in the first place?
- The best starting point was probably on the [Primo Working Group](#) page, but I wasn't on the group as of yet and wasn't aware of the page
 - Ex Libris-maintained [Best Practices Guide](#) another possible starting point

Primo Studio

- Does provide an easy-to-use environment for theme changes, and for testing the plugins that are there
- Does not actually have very many add-ons, though those that are there are high-quality
 - I counted 17
- Ultimately we didn't make a lot of use of this even though it's a useful tool

Customizations we used:

- [HathiTrust customization](#) (so easy, my boss added it)
- [Help Menu topbar](#) ([example](#), planned Summer 2023 at Brandeis)

Ex Libris App Center

<https://developers.exlibrisgroup.com/appcenter/?search=&products=primo&type=&tags=#filter>

Includes what's in Primo Studio (add-ons) and other “extensions”

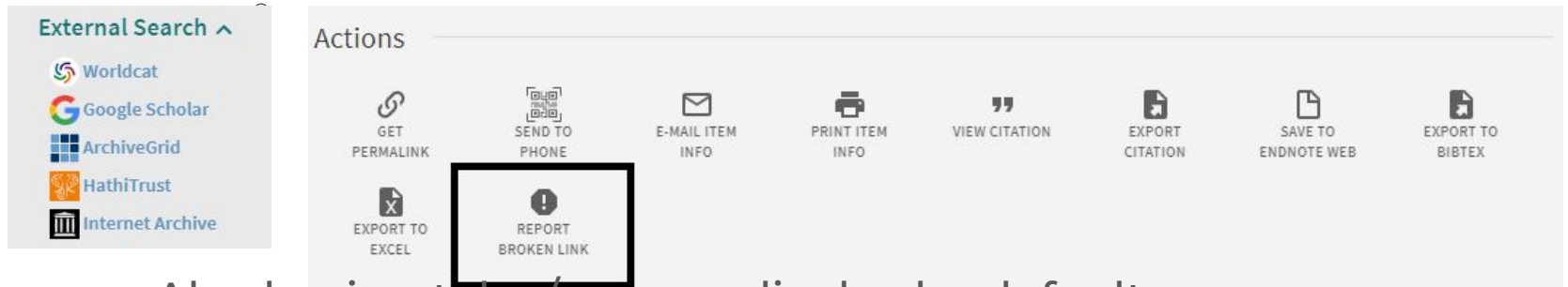
26 in total, so slightly better selection, but still fairly limited as to what's listed there

Customizations we used:

- [Facet values to top of list](#)
 - Locking books to the top of the resource type facet had been wanted at Brandeis for many years
- [Enhanced no results tile](#)

Consortial webpages - Orbis Cascade

- 23 in total for [Primo VE toolkit](#)
- Availability counts added to top-level facets, open access and peer reviewed badges, external search, custom actions, favorites warning (before Primo added it)



- Also having tabs / scopes display by default

Other consortial webpages

- Many consortia focus on non-JavaScript changes
 - Officially supported customization, some common CSS changes
 - Examples: [CARLI](#), [SUNY](#)
- Others have JavaScript customizations that have a more local focus
 - [Cal State](#)
- Question to audience: any good consortial webpage in IGeLU, or other good consortial webpages generally?

Searching GitHub / NPM

- [Searching GitHub for "primo-explore"](#) as recommended on the [Best Practices](#) page
 - Some potentially very useful stuff can be found that way
 - [Insert HTML in public notes](#), [Primo New Books slider for BO](#) (ENUG 2019, there's also a VE version), [Custom Library Card](#), etc.
- Too comprehensive in some ways
 - Lots of “noise” – test customizations, out-of-date customizations etc.
- Some customizations don't use the “primo-explore” naming convention
 - One of many [examples](#)
- Less useful for us given we'd already taken the aforementioned steps

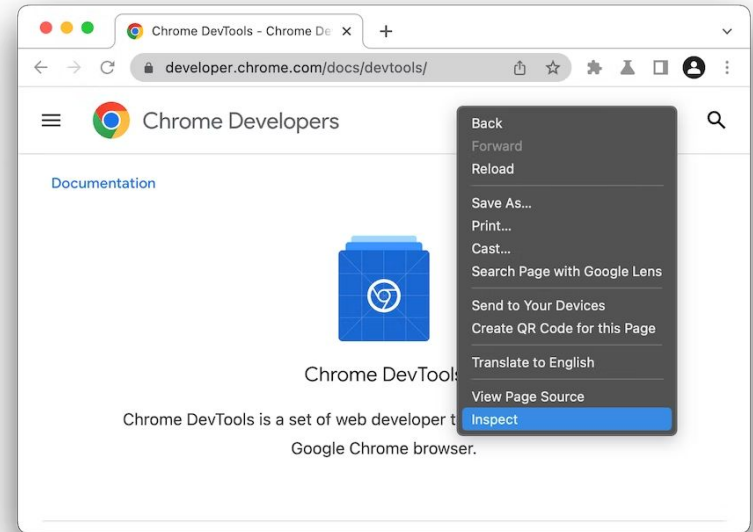
The listserv

- Intuitively tends to be focused on solutions to specific issues
- If someone stands out as knowledgeable on the listserv, I check to see if they have Primo customizations
 - I keep a list of institutions that have done interesting things with Angular / JS
- Searching the listserv for a JavaScript solution can sometimes work, but it's a bit of a crapshoot
 - Organizing what's been shared that way could really be useful...
 - Occasionally people respond off-list with really useful stuff, unfortunately
- **Listserv enhancements:** footer not overlapping with facets, automatic search when facets / scopes change, change in availability text for external harvested resources, toggle for pickup location field

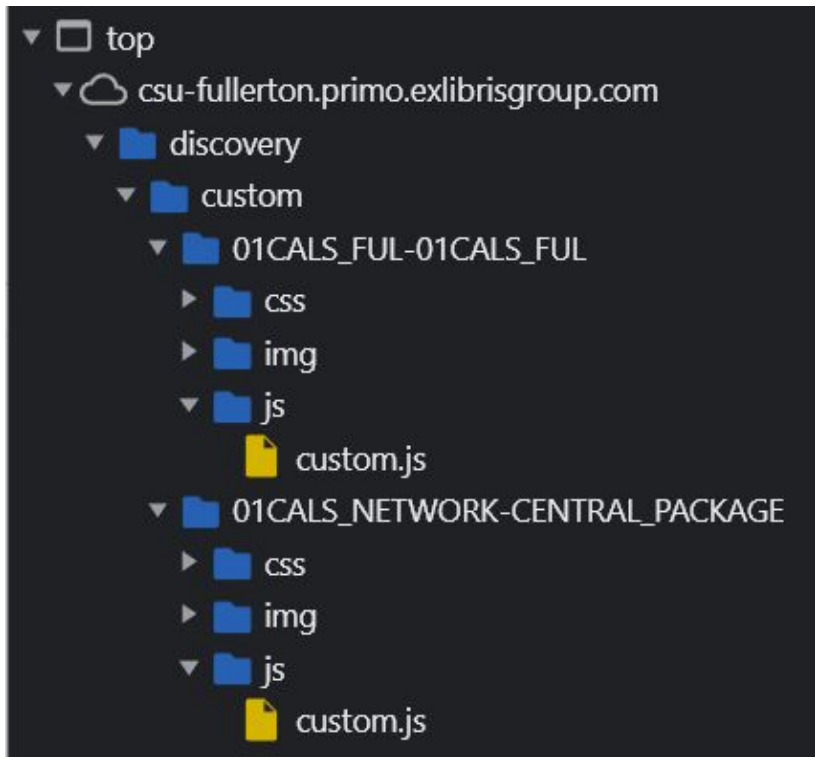
Looking directly at other institutions' Primo

Accessible using Chrome Developer Tools

Easiest way: Right-click and select "Inspect"



Use Sources panel to find their code



Use overrides to test code without Dev environment

Just takes a few minutes, and you can test on any site – not just your own Primo installation

[Setup instructions](#)

I only make changes to our customization package this way and don't make any use of the development environment, which I find to be a hassle

Our in-house customizations

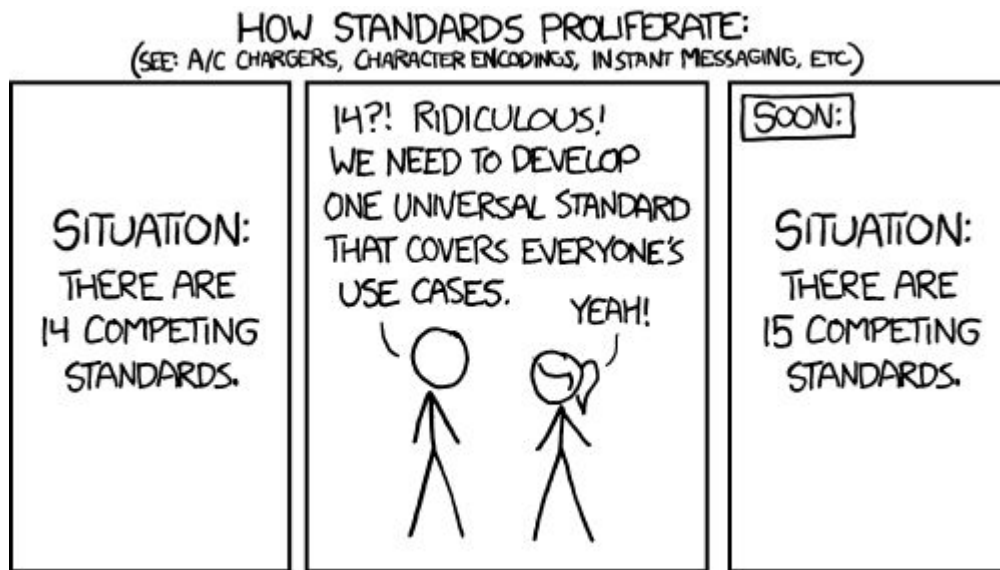
Very modest list:

- DEI metadata substitutions
- Adding a finding aid link to Alma-D collection descriptions
- Banner message for blank ILL form, and a more general banner message that can be used for outages
- Toggle filters for serials automatically
- “Back to catalog” link from A-Z
- Adjusting availability message in select cases

Most indexed nowhere and findable by no one

There's quite a bit that isn't indexed anywhere

Perhaps the Primo Working Group can try to do more to organize what's already been created going forward



Why do this? (Outside of the obvious.)

- I learned what could and couldn't be done with Primo customization in what I would consider to be the best way possible – by seeing the things others had already done
 - Also got a sense for difficulty
- Again, many of these customizations were quite popular, and were low-effort to add given other institutions already created them
- Better understand now what both librarians and users want
 - Some customizations I liked were voted down, like an embedded report a missing item form

Disclaimer: code is copyrighted by default (even open source)

- Sometimes license information is clearly indicated somewhere like GitHub, and sometimes a license isn't specified at all
- Seems unlikely that a library would assert copyright over their customizations in a way that would keep you from using them, but it's not impossible