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

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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

https://xkcd.com/927/
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.