<table>
<thead>
<tr>
<th>Session</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction to Primo</td>
<td>Jan 28</td>
<td>10am CT</td>
</tr>
<tr>
<td><strong>How Primo Works</strong></td>
<td>Feb 4</td>
<td>10am CT</td>
</tr>
<tr>
<td>Search Configuration</td>
<td>Feb 11</td>
<td>10am CT</td>
</tr>
<tr>
<td>Search Interfaces</td>
<td>Feb 18</td>
<td>10am CT</td>
</tr>
<tr>
<td>Branding, CSS, HTML</td>
<td>Feb 25</td>
<td>10am CT</td>
</tr>
<tr>
<td>Display Configuration</td>
<td>Mar 4</td>
<td>10am CT</td>
</tr>
<tr>
<td>Delivery Configuration</td>
<td>Mar 11</td>
<td>10am CT</td>
</tr>
<tr>
<td>Local Data</td>
<td>Mar 18</td>
<td>10am CT</td>
</tr>
<tr>
<td>Central Discovery Index</td>
<td>Mar 25</td>
<td>10am CT</td>
</tr>
<tr>
<td>External Resources</td>
<td>Apr 1</td>
<td>10am CT</td>
</tr>
<tr>
<td>Dedup and FRBR</td>
<td>Apr 8</td>
<td>10am CT</td>
</tr>
<tr>
<td>Primo Analytics</td>
<td>Apr 15</td>
<td>10am CT</td>
</tr>
</tbody>
</table>
How Primo Works

Laura Jacobs
• Resources in Primo, Alma, & CDI
• How Search Works
• How Ranking Works
• User Experience
• Resources in Primo, Alma, & CDI
• How Search Works
• How Ranking Works
• User Experience
How your local records work with discovery

Library Collections

- Alma (Institution/Network Zones)
- Alma Digital
- External resources loaded into Alma

Primo User Interface

Indexed within 15 minutes
How the Central Discovery Index works with discovery

1. Activate your full text subscriptions in Alma
2. CDI matches active titles with ALL metadata in the index
3. Your full text subscriptions are automatically discoverable in Primo

Ex Libris ingests all available collections and titles into the KnowledgeBase

Ex Libris ingests article (book, book chapter) level metadata from different sources and deduplicates it in CDI

48-72 hours
Resources in Alma and Primo (DEMO)

• Physical resource in the catalog
• Online resource in the catalog
• Physical and online resource in the catalog
• CDI resources
Local Resources (DEMO)
• Resources in Primo, Alma, & CDI
• How Search Works
• How Ranking Works
• User Experience
How Search Works

- Automatic search optimizations
- User search optimizations
  - Keyword searches
  - Exact match searches
  - Root words
  - Wildcards
  - Stemming
  - Boolean operators
- Restricted search and delivery scopes
- Authentication, Discovery, Delivery for CDI
Automatic Search Optimizations

Suggested search terms

• Autocomplete
• Controlled vocabulary
• Spelling corrections and synonyms
• Stop words

Expands searches based on word stems

• Considers results with original query more relevant

Keyword phrase searches

• Considers results with terms in close proximity more relevant
Suggested Search Terms – Autocomplete

- music
- music therapy
- mushrooms
- music performance anxiety
Suggested Search Terms – Controlled Vocabulary Service

Including "myocardial infarction". Just search heart attack

REFERENCE ENTRY
heart attack
2017
Encyclopaedia Britannica, Inc.
“information on heart attack, visit Britannica... A heart attack results from obstruction of the... facilitate the onset of a heart attack upon waking...”

Available Online
Suggested Search Terms – Spelling Corrections & Synonyms

Synonyms

- 5th or fifth
- Color or colour
- Spelling corrections and synonyms
Suggested Search Terms – Stop words

- A
- An
- The
- And
- But
- Or
- It
- Of
- On
- With
- In
- Is
- Are
Keyword Searches (DEMO)
Exact Search (DEMO)
Boolean Operators and Order (DEMO)

Terms are handled sequentially: everything that starts with mushroom (but not the exact term ‘mushroom’) OR the exact term mushrooms. Would include mushrooming and mushroomed, but would also include results with the term mushrooms.

Terms in parentheses gets handled first: everything that starts with the term mushrooms, but not the exact terms ‘mushroom’, ‘mushrooms.’ Would include terms like mushrooming or mushroomed.
Root words, wildcards, and stemming (DEMO)

Keyword search: if results are limited, will include both ‘mushroom’ and ‘mushrooms’

Wildcard search: will include results that have words that start with ‘mushroom’ (inc. mushrooms, mushroomed, mushrooming...)

Stemming: if results are limited, will include ‘mushroom’ results as well; however results with the term ‘mushrooming’ are treated as more relevant
How Users Can Affect Ranking – Boolean Operators (DEMO)

Treats entire query as a keyword phrase and returns results where the terms are near each other.

Treated as separate phrases and returns results in which the phrase communication may not be close to the words in the other phrase.
## Authentication, Discovery and Delivery

<table>
<thead>
<tr>
<th>On Campus Users</th>
<th>Logged in Users</th>
<th>Off Campus Users</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>On Campus</strong></td>
<td><strong>Logged in</strong></td>
<td><strong>Off Campus</strong></td>
</tr>
<tr>
<td><strong>Not logged in</strong></td>
<td><strong>Logged in</strong></td>
<td><strong>Not logged in</strong></td>
</tr>
<tr>
<td><strong>Primo knows where they are, but not who they are</strong></td>
<td><strong>Primo knows where and who the user is</strong></td>
<td><strong>Primo doesn’t know where or who the user is</strong></td>
</tr>
<tr>
<td><strong>User is recognized as an authorized user of subscription content</strong></td>
<td><strong>User is recognized as an authorized user of subscription content</strong></td>
<td><strong>User is NOT recognized as an authorized users of subscription content</strong></td>
</tr>
</tbody>
</table>
### Authentication, Discovery and Delivery

<table>
<thead>
<tr>
<th>On Campus Users</th>
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<th>Off Campus Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Campus</td>
<td>On Campus</td>
<td>Off Campus</td>
</tr>
<tr>
<td>Not logged in</td>
<td>Logged in</td>
<td>Not logged in</td>
</tr>
<tr>
<td>CDI search results include all resources active in CDI</td>
<td>CDI search results include all resources active in CDI</td>
<td>CDI search results include only resources active in CDI that are not restricted to search; for results retrieved, they may also need to log in via proxy for delivery of full text</td>
</tr>
<tr>
<td>Logged in</td>
<td>Logged in</td>
<td>Logged in</td>
</tr>
<tr>
<td>CDI search results include all resources active in CDI</td>
<td>CDI search results include all resources active in CDI</td>
<td>CDI search results include all resources active in CDI but may also need to log in via proxy for delivery of full text</td>
</tr>
<tr>
<td>Off Campus</td>
<td>Off Campus</td>
<td></td>
</tr>
<tr>
<td>Logged in</td>
<td>Logged in</td>
<td></td>
</tr>
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</tr>
</tbody>
</table>
Restricted Groups

Restricted User Groups
• Restricts groups of users from accessing restricted Central Index collections and EBSCO Search
• If user is part of restricted group, they will not have access unless on campus
• E.g. Alumni w/user accounts who sign in off campus

Restricted Search Groups
• Restricts groups of records from appearing in the search results for specific users (based on IP ranges, user groups, registered users, on campus users)
• If user is allowed to search, they will be able to see search results from that group of records
• If user is not allowed to search, no search results from that group of records will appear
• Resources in Primo, Alma, & CDI
• How Search Works
• How Ranking Works
• User Experience
How Ranking Works (DEMO)

• How users can affect ranking of results
• How CDI results are ranked
• How local records are ranked
• How blended results are ranked
How Users Can Affect Ranking – Personalization (DEMO)

Expand
Sort
Facet (filter)

Personalize the results
You can help us provide you with better result matches by focusing the search on your preferred disciplines. Please select up to 5 disciplines.

- Agriculture & Forestry
- Arts & Humanities
  - History & Archaeology
  - Languages & Literature
  - Philosophy & Religion
- Business & Economics
- Engineering
  - Computer Science
  - Materials Science
- Law
- Library & Information Science
- Medicine
  - Diet & Clinical Nutrition
  - Pharmacy, Therapeutics & Pharmacology
- Nursing
- Physics
- Psychology
- Sciences
  - Biology
  - Chemistry
  - Earth Sciences
  - Mathematics
- Social Sciences
  - Anthropology
  - Education
  - Geography
  - Journalism & Communications
  - Political Sciences
  - Public Health
  - Sociology
  - Statistics
  - Veterinary Medicine
### How CDI Results are Ranked

<table>
<thead>
<tr>
<th>Dynamic Rank (applies to query)</th>
<th>Static Rank (value of the item)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field weighting</td>
<td>Resource type</td>
</tr>
<tr>
<td>Term weighting</td>
<td>Publication date</td>
</tr>
<tr>
<td>Term frequency and field length</td>
<td>Scholarly/Peer review</td>
</tr>
<tr>
<td>Verbatim match boost</td>
<td>Citation counts</td>
</tr>
<tr>
<td>Phrase and proximity match boost</td>
<td>Journal rank</td>
</tr>
<tr>
<td>Exact title and title+subtitle match boost</td>
<td>Anonymous author</td>
</tr>
<tr>
<td>Known item search boost</td>
<td></td>
</tr>
</tbody>
</table>
How Local Results are Ranked (DEMO)
How Blended Results are Ranked

<table>
<thead>
<tr>
<th>Code</th>
<th>Display Name</th>
<th>Search type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CentralIndex</td>
<td>Central Index</td>
<td>All records within your Central Index profile</td>
</tr>
<tr>
<td>2</td>
<td>CourseReserves</td>
<td>Course Reserves</td>
<td>All records linked to an active course</td>
</tr>
<tr>
<td>3</td>
<td>MAPS</td>
<td>Maps</td>
<td>Local Data</td>
</tr>
<tr>
<td>4</td>
<td>MUSIC</td>
<td>Music Library</td>
<td>All resources in the Music Library</td>
</tr>
<tr>
<td>5</td>
<td>MyInst_and_CI</td>
<td>Search everything</td>
<td>Blended - All records belonging to your institution and your Central Index profile</td>
</tr>
<tr>
<td>6</td>
<td>MyInstitution</td>
<td>Library Catalog</td>
<td>All records belonging to your institution</td>
</tr>
<tr>
<td>7</td>
<td>Research</td>
<td>All outputs</td>
<td>Local Data</td>
</tr>
<tr>
<td>8</td>
<td>ResearchETD</td>
<td>Dissertations &amp; Theses</td>
<td>All Records within your Research</td>
</tr>
</tbody>
</table>

Configure blending

Edit blending configuration for Search profile: MyInst_and_CI

<table>
<thead>
<tr>
<th>Enabled</th>
<th>Search engine</th>
<th>Boost type</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Local</td>
<td>Boost</td>
<td>Boost records with a medium score - Boost position: top - Number of results to boost: 5 - Boost factor: 2.5</td>
</tr>
<tr>
<td>2</td>
<td>Central Index</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
• Resources in Primo, Alma, & CDI
• How Search Works
• How Ranking Works
• User Experience
User Experience Optimization (DEMO)

• Branding
• Links in Main Menu
• Labels
• Search configuration
• Search results configuration
• Brief and full record configuration
• Topic Overview
• Resource Recommender
Advanced Search Interfaces – Resource Recommender (DEMO)

**Databases**
- **linguistics**
  - Suggested Database: ProQuest Linguistics Database
  - Go to database

**Websites**
- **library hours**
  - Library Information
    - Library Hours
      - Ex Libris Institute Homepage
      - Open Monday thru Friday 8 am - 8 pm; Saturday and Sunday 10 am - 4 pm

**Person**
- **lichen identification**
  - Suggested Librarian: Jean Dill
    - Experienced in identifying wildflowers, trees, lichens, mushrooms, birds, and other wildlife.

**Library Guide**
- **electronic resource management**
  - Library Guide
    - Ex Libris’ Resource Management LibGuide
Knowledge Center Resources

• Primo VE End User Help
• Linguistic Features for Primo VE
• Search and Ranking in CDI
• Personalizing Results
• How Blended Results are Ranked
• Resource Recommender
Premium Services - a more individualized approach

Premium Services are one-on-one paid services to customers that are interested in workflow optimization, individualized training, hands-on configuration, or other individualized assistance with Ex Libris products.

Premium.Services@exlibrisgroup.com
Thank you!