<table>
<thead>
<tr>
<th>Session</th>
<th>Date</th>
<th>Time</th>
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</thead>
<tbody>
<tr>
<td>Introduction to Primo</td>
<td>Jan 28</td>
<td>10am CT</td>
</tr>
<tr>
<td>How Primo Works</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>
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<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>
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</tbody>
</table>
Search Interfaces Configuration

Laura Jacobs
Search Interfaces
- Browse
- Newspaper Search
- Journal Search
- Database Search
- Collection Discovery
- Tags

Search Results
- Topic Overview
- Resource Recommender
Browse
Browse Search
Browse Search – Steps to configure

1. Ensure you have the correct user role(s)
2. Enable in the View’s Links Menu tab
3. Determine which fields to make available for browsing
4. Ensure labels for browse categories appear correctly in Primo
5. Learn more about the fields in MARC that are used to generate browse headings (Author, Title, Series, Subject)
1. Ensure you have the correct User Role

- Discovery Admin

*User Details > Add Roles*
2. Enable in Links Menu (DEMO)

**Discovery > Display Configuration > Configure Views > Links Menu tab**

<table>
<thead>
<tr>
<th>Active</th>
<th>Code</th>
<th>Label</th>
<th>URL</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>LibGuides</td>
<td></td>
<td><a href="http://guides.lib.xxx.ac.za">http://guides.lib.xxx.ac.za</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td>LibrarySearch</td>
<td>Library Search</td>
<td>/discovery/search?vid=TRAINING_1_INST_TRAI...</td>
<td>Library Search</td>
</tr>
<tr>
<td></td>
<td>JournalSearch</td>
<td>Journal Search</td>
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<td>Journal Search</td>
</tr>
<tr>
<td></td>
<td>BrowseSearch</td>
<td>Browse Search</td>
<td>bsearch</td>
<td>Browse Search</td>
</tr>
<tr>
<td></td>
<td>DatabaseSearch</td>
<td>Database Search</td>
<td>dbssearch</td>
<td>Database Search</td>
</tr>
<tr>
<td></td>
<td>CollectionDiscovery</td>
<td>Collection Discovery</td>
<td>/discovery/collectionDiscover...</td>
<td>Collection Discovery</td>
</tr>
<tr>
<td></td>
<td>NewspaperSearch</td>
<td>Newspapers</td>
<td>/discovery/npssearch?vid=TRAINING_1_INST_TRAI...</td>
<td>Newspapers</td>
</tr>
</tbody>
</table>

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3. Enable types of browse available (DEMO)

**Discovery > Display Configuration > Configure Views > Links Menu > Edit**
4. Change browse labels if needed (DEMO)

*Discovery > Display Configuration > Labels*
5. Find more information in documentation (DEMO)

<table>
<thead>
<tr>
<th>Headings Type</th>
<th>Options</th>
</tr>
</thead>
</table>
| Names         | Family – If more than one active registry has been configured for your system, use this option to select the preferred registry (such as MARC 21, UNIMARC, or CNMARC) for browsing. Source Code – Select one of the following options:  
  - Corporate Name
  - Meeting Name
  - Personal Name
  - Uniform Title – This option appears when `browse_headings_use_uniform_title_in_names` is set to `true`. See `browse_headings_use_uniform_title_in_names` for more information. Note that uniform titles can also be browsed when you select the Title headings type. See Title for more information.
  - Vocabulary – This options appears when there is more than one vocabulary defined for Names. The Names vocabularies that are searched for Browse Bibliographic Headings is determined by the customer parameter set by Ex Libris for authority names. If more than one Names vocabulary is specified, the priority of the vocabularies that appears in the drop-down list for this option is determined by the order specified in the parameter set by Ex Libris. Use this option to select the vocabulary that you want to use for browsing bibliographic headings. See Authority Priorities for more information.
  - Search Value – Enter a names value for which you want to search. |

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/040Metadata_Management/020Navigating_the_MD_Editor_Page/Browsing_Bibliographic_Headings
Newspaper Search

These search results do not include newspapers. View results from our entire collection of newspapers, or search specifically within Featured newspapers.

Search within newspapers

Search across 1 billion newspaper articles from hundreds of newspapers, or use the link below to view articles from featured newspapers.

Featured newspapers

- **Historical News, New York times**: Historical News is the definitive newspaper digital archive empowering researchers to digitally travel back through history.
- **Business and Finance News**: International business and economic news.
# Newspaper Search

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>Retrieves results in general CDI search, contains no (or very little) newspaper content</td>
</tr>
<tr>
<td>Yes</td>
<td>Retrieves results in general CDI search UNLESS Newspaper Search is activated; contains mixed content</td>
</tr>
<tr>
<td>Yes, Newspaper Search Only</td>
<td>Retrieves results ONLY in Newspaper Search</td>
</tr>
</tbody>
</table>
Newspaper Search – Steps to configure

1. Ensure you have the correct user role(s)
2. Enable in the View’s General tab
3. Enable in the View’s Links Menu
4. Enable in the Central Index and Proxy Setup page
5. Determine if you want to configure Featured Newspapers
1. Ensure you have the correct User Role(s)

**User Details > Add Roles**

- Discovery Admin
Journal Search
Journal Search

Search for journals

Use the following options to find journals:

- Enter a journal title in the search box.
- Use the Journals by category option to browse journals by category.
Journal Search – Steps to configure

1. Ensure you have the correct user role(s)
2. Enable in View’s Links Menu
3. Edit link in menu to Display Categories Browse feature
4. Ensure the Creates Journal Categories File job is set to run daily
5. Change the category labels if desired
1. Ensure you have the correct User Role(s)

- Discovery Admin

User Details > Add Roles
Database Search
Database Search

Enter database name

Databases by category
- Agriculture and Food Sciences
  - Agriculture
  - Food Science
- Education
- Engineering
- Law

Search for databases

To search for databases you can do the following:

- Enter keywords in the search box.
- Browse databases by category.
Database Search – Steps to configure

1. Ensure you have the correct user role(s)
2. Determine and configure the category structure
   a) Assign a MARC field to contain categories
   b) Consider setting up a Controlled Vocabulary Registry
3. Ensure that the databases/collections you want to be searchable
   a) Are associated with a descriptive (bibliographic) record that is not suppressed
   b) Have a collection-level URL configured for linking to the database or collection
4. Create descriptive records and add categories to MARC field
5. Ensure ‘Create DB Categories File’ job is running
6. Enable Database Search in Links Menu
7. Consider adding local display and search fields to include new MARC field data
1. Ensure you have the correct User Roles

- Discovery Admin
- Catalog Manager/Operator
- General System Administrator

User Details > Add Roles
Collection Discovery
Collection Discovery

Digitised Collections from the Library and Archives

All Collections

Collections

- Collection: Art and illustration
- Collection: Books, prints and ephemera
- Collection: Archives and manuscripts
Collection Discovery – Steps to configure

1. Ensure you have the correct user role(s)
2. Go to Manage Collections area to determine/configure collections for Discovery
3. Enable Collection Discovery Feature in View’s General tab
4. Enable link to Collection Discovery in View’s Links Menu tab
1. Ensure you have the correct User Role(s)

- **Discovery Admin**
- **Collection Inventory Operator** – Create and edit sub-collections and move sub-collections between parent collections.
- **Collection Inventory Operator Extended** together with Collection Inventory Operator – Create, edit, and delete top level collections and promote a sub-collection to be a top-level collection. Create, edit, and delete sub-collection and move sub-collections between parent collections.
- **Digital Inventory Operator** – Add/remove titles to/from a collection and move a title between collections.

**User Details > Add Roles**
Tags

Most popular tags
- field guides (7)
- flower identification (3)
- mushroom identification (3)
- moss and lichen identification (1)

Recently added tags
- mushroom identification (3)
- field guides (7)
- moss and lichen identification (1)
- flower identification (3)

My recent tags
- mushroom identification (3)
- field guides (7)
- flower identification (3)
Tags – Steps to configure

1. Ensure you have the correct user role(s)
2. Enable/disable in Links Menu
3. (Ongoing) Manage Tags
1. Ensure you have the correct User Role

**User Details > Add Roles**

- Discovery Admin
About this Topic /
Topic Overview /
Highlight reference entry on top
Topic Overview – Steps to configure

1. Ensure you have the correct user roles
2. Ensure at least one of the following collections are active:
   • Credo
   • Encyclopedia Britannica
   • Gale Virtual Reference Library
   • Worldbook
   • Netadvance
   • Wikipedia
3. Enable in View’s General tab
1. Ensure you have the correct User Role(s)

- Discovery Admin
- CDI Inventory Operator
- Electronic Inventory Operator/Extended
- Repository Manager
Resource Recommender

**Databases**

- linguistics
  - ProQuest Linguistics Database
  - Go to database

**Websites**

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

**Person**

- lichen identification
  - Everything
  - Experience in identifying wildflowers, trees, lichens, mushrooms, birds, and other wildlife.

**Library Information**

- electronic resource management
  - Library Guide
    - Ex Libris' Resource Management LibGuide
Resource Recommender – Steps to configure

1. Ensure you have the correct user role(s)
2. Configure resources that you want to recommend
1. Ensure you have the correct User Role

**Discovery Admin**

*User Details > Add Roles*
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
Knowledge Center Resources

• Browse
• Newspaper Search
• Journal Search
• Database Search; Community Knowledge Article; KA
• Collection Discovery; Managing Collections
• Tags
• Topic Overview (Highlight reference entry on top)
• Resource Recommender
Thank you!