Primo User Experience

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Poll

• How many of you are using the new UX?

• How many of you are considering using the new UX?
Agenda

- Local and Remote Resources
- Primo Central
- Discovery and Delivery
- Exercise
Local and Remote Resources

Primo Front End

Local Resources
Your ILS
Local digital repositories

Remote Resources
Primo Central
EBSCO, WorldCat

Remote Resources – Primo Central

Primo Central
(Remote Resources)

Primo

Primo

Primo
Local and Remote Resources Summary

Local Resources
- Local institution’s data is transformed into PNX via publishing process
- Can customize normalization process
- PNX viewable in PNX viewer and web browser

Primo Central
- Records are also in PNX
- Records are processed at a global level (i.e. not customizable)
- PNX viewable in web browser only

Agenda
- Local and Remote Resources
- Primo Central
- Discovery and Delivery
- Exercise
Primo Central – Activation Wizard - DEMO

- Primo Back Office > Institution > My Profile
- My Client Applications > Your PC Account (Primo)
- Edit Client Resources

Primo Central – Primo Central Collections

All Primo Central collections
Available in the Activation Wizard

Active
Primo Central collections
Expanded results in Primo

Institution’s subscription resources
Default results in Primo
### Primo Central – Alternate Coverage

<table>
<thead>
<tr>
<th>Collection</th>
<th>Provider</th>
<th>Index coverage</th>
<th>Alternative Collections for Activation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abstracts in Social Gerontology</td>
<td>EBSCO</td>
<td>97%</td>
<td>Academic OneFile (Gale)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>General OneFile (Gale)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>MEDLINE/PubMed (U.S. National Library of Medicine (NLM))</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>NARCIS (Royal Netherlands Academy of Arts and Sciences)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Scopus (Elsevier)*</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>SvePub (National Library of Sweden (Kungliga biblioteket - Sveriges nationalbibliotek))</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Web of Science - Social Sciences Citation Index*</td>
</tr>
</tbody>
</table>

### Primo Central – Institutional Holdings File

<table>
<thead>
<tr>
<th>Primo Central Collection: Gale OneFile</th>
<th>Institutional holdings file</th>
<th>Full text available?</th>
</tr>
</thead>
<tbody>
<tr>
<td>0894-8763 - Journal of Applied Meteorology</td>
<td>n/a</td>
<td>No full text</td>
</tr>
<tr>
<td>1362-5072 - Journal of Applied Microbiology</td>
<td>1362-5072 - Journal of Applied Microbiology</td>
<td>Full text available</td>
</tr>
<tr>
<td>0264-3758 - Journal of Applied Philosophy</td>
<td>n/a</td>
<td>No full text</td>
</tr>
<tr>
<td>0021-8979 - Journal of Applied Physics</td>
<td>n/a</td>
<td>No full text</td>
</tr>
<tr>
<td>0021-9037 - Journal of Applied Spectroscopy</td>
<td>n/a</td>
<td>No full text</td>
</tr>
</tbody>
</table>
Primo Central – Updates

Indexed weekly

5 - 10 days for changes to take effect

Agenda

• Local and Remote Resources
• Primo Central
• Discovery and Delivery
• Exercise
Discovery and Delivery – DEMO

Primo Front End Introduction
• Components of screen
  • Header (logo)
  • Navigation
  • Search bar
  • Main portion of the screen
• Ways to separate collections for discovery in Primo
  • Tabs
  • Scopes

Discovery and Delivery – Local Resources – DEMO

Basic search (in Library Catalog)
• Local resource search (global economy) – keyword search
• Search results presentation
  • Titles are links (can be changed to go to Details tab)
  • Availability statements
  • Sorting results and relevancy
  • Refining results using facets

Advanced search
• Pre-filters
## Discovery and Delivery – Local Resources – DEMO

### Discovery Tabs
- Details – includes data source
- Virtual Browse
- bX (if applicable)

### Delivery
- Availability statement for physical, online, electronic resources
- View It/Get It tabs
- Details tab – Links/Email/Print/Save citations

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## Discovery and Delivery – Local Resources – DEMO

**Browse only applies to your local data**

### Browse options
- Browse by subject
- Browse by title
- Browse by author/creator
- Browse by call number
  - Generic configured during implementation
  - LC, DDC, NLM, SUDOC, Other
- Virtual Browse
Discovery and Delivery – Remote (Primo Central) – DEMO

Basic search (in Primo Central)
• Search again for (global economy) – keyword search (> results)
• Search results presentation
  • Again titles are links (can be changed to go to Details tab)
  • Availability statements a bit different (full text)
  • Refining results using facets (note presence of articles and news)
  • Expanding results (to see no full text)

Discovery and Delivery – Remote (Primo Central) – DEMO

Delivery method – link resolver
• View It provides a link or multiple links to resource
• Uses link resolver
• Preferred method of delivery when it’s available
• Availability shows ‘Full Text Available’ if the publication is in the holdings file
• Availability shows ‘No full text available’ if the publication is not in the holdings file
### Discovery and Delivery – Remote (Primo Central) – DEMO

**Delivery method – Fixed availability**
- New search – global economy harvard
- View It goes directly to resource
- Uses link vendor provides
- Use this link because resource may not provide OpenURL resolution
- Availability shows ‘Full Text Available’ ALWAYS – i.e. if it’s active
  - If the publication/article is free, no problem!
  - If the publication/article requires a subscription to access, you’ll either
    - Get prompted to log into the site (default)
    - Get prompted to log into the proxy (configured in the Institution Wizard)

### Discovery and Delivery – Blended Scope

**Basic search (in Everything scope)**
- Search again for (global economy) – keyword search (> results)
- Search results presentation

**Top Level Faces**
- Expand My Results (Primo Central only – includes no full text)
- Peer reviewed journals (Primo Central only)
- Full text online (both Primo Central and local online resources)
- Available in the Library (physical local resources only)

**Refine My Results**
- Facets
- Options
- More options
Discovery and Delivery – My Account Area

My Account area

• E-shelf
• Logging in vs not logging in

Exercise #4

Search local resources

• Go to Primo UX URL
• Conduct a few searches in both simple and advanced search

See the PNX for a local record

• Choose a search result and go to the full record display
• Add &showPnx=true to the end of the URL to see the PNX

Search Primo Central resources

• Conduct a few searches in the Primo Central scope
• Note the citation’s source in the full display
• Note where the full text is coming from when you click ‘View It’
• Expand your results using the facet ‘Expand my Results’
• Note the results now include citations that do not link to full text.

See handout for step-by-step instructions
Sample searches

Basic search
- Search in different scopes and tabs to see results
- Examples
  - Keyword search (default) - global economy
  - Spelling correction (Did You Mean) - library
  - Stemming - flower vs flowers vs flowering
  - Boolean - flower AND gardening, flower OR gardening, flower NOT gardening
  - Phrase searching using quotes - "flower gardening"
  - Wildcard searches using asterisk and question mark - wild* AND wom?n
- Apply facets
- Explore information in the full record

Advanced search
- Test Pre-filters