

Primo



Primo Product Update

Yisrael Kuchar
Senior Director of Product Management, Discovery Solutions



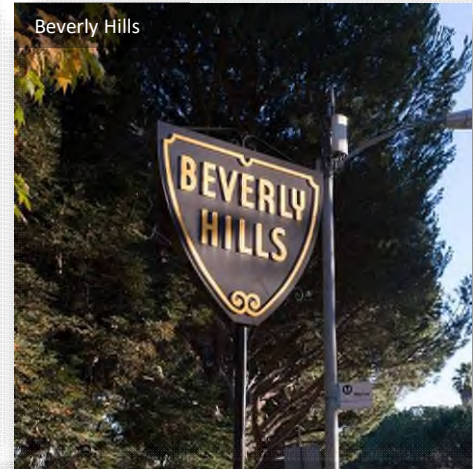
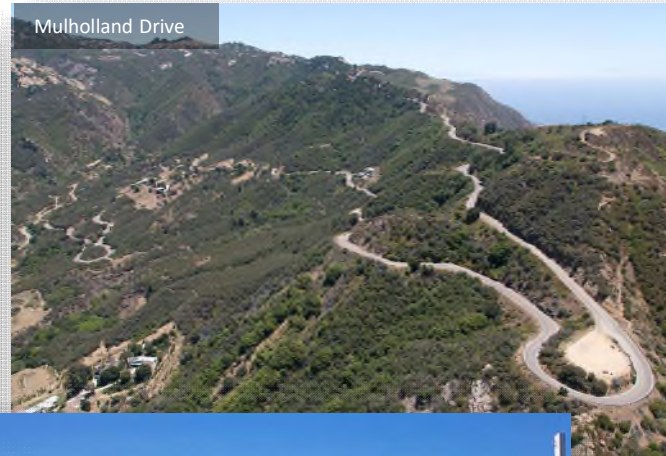
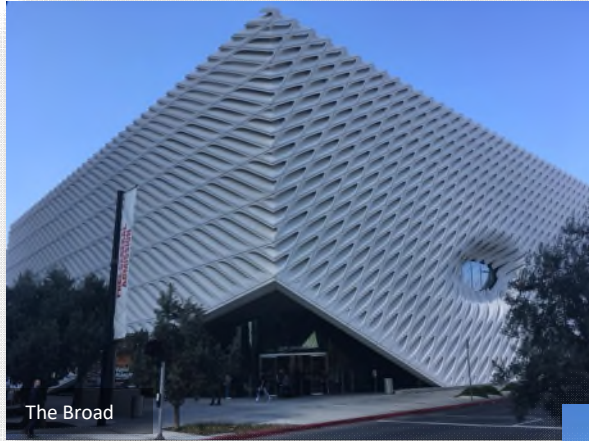
Nili Natan
Director of Product Management



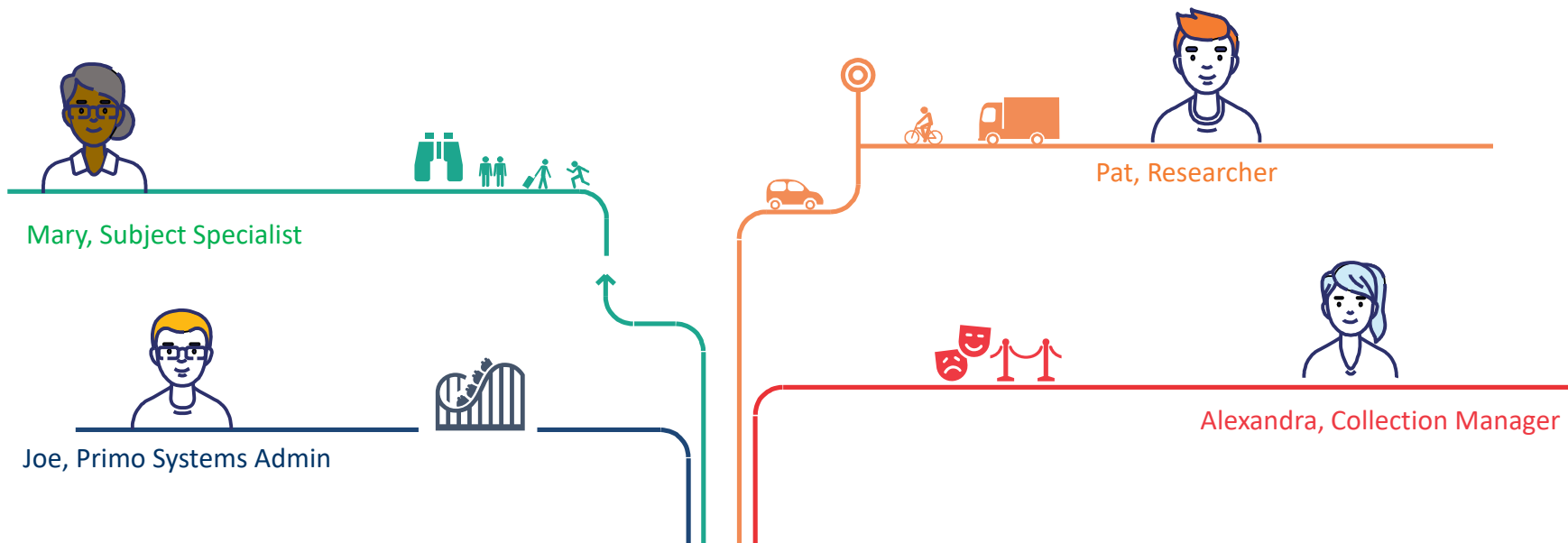
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Los Angeles Has Something For Everyone



A Rewarding Journey with Different Users



User's story

What location are they exploring ?

Don't miss the top attractions

Touring with Mary

Position: Subject Specialist

Role: She possesses extensive knowledge regarding information sources and services pertaining to a specific field and is accountable for fulfilling reference requests and offering research support related to this field

Desires: Share her expertise in the field with others and engage with a larger patron audience within the university



Promote Subjects with Resource Recommender

Promote expertise in subject areas helping patrons find resources and guidance when searching for the subject

architecture X Alma University

LIBRARY GUIDE
Architecture and Urban Planning
[Go to guide](#)
Check out our research guide for Architecture and Urban Planning curated by our librarian Jane Smith.

SUGGESTED LIBRARIAN
Mary Smith
Meet with our librarian Mary Smith. She specializes in architecture, design and urban planning.
[Email Mary Smith](#)

0 selected PAGE 1 1-10 of 32,417 Results Save query

1 **BOOK**
Ten lectures on the elaboration of cognitive grammar
Langacker, Ronald W., author.
2017
[Available Online >](#)

Coming this year support
in inflections and
single/plural to improve
matches

Accurate Searches in Specific Subject

Guide users looking for materials in specific subject areas

Subject

- Computer science >
- Data structures (Computer science) >
- Computers >
- Computer science -- Mathematics >
- Computer Science >
- Theory of Computation >
- Data Structures, Cryptology and Information Theory >
- Discrete Mathematics in Computer Science >
- Data Structures >
- Combinatorics >

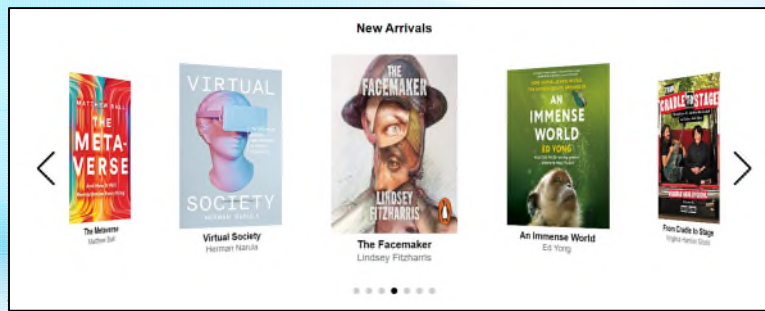
SEARCH CRITERIA

→ Subject equals exact phrase Data structures AND Any field contains _____

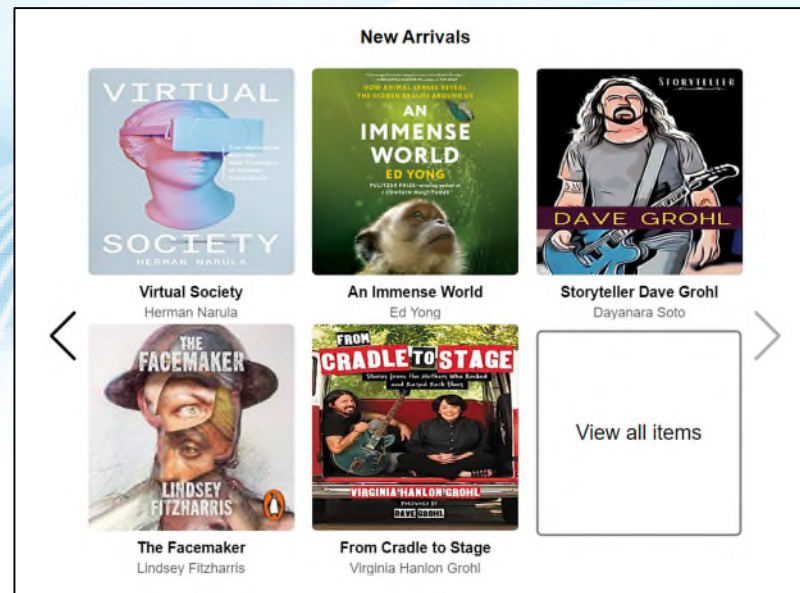
New options in Advanced Search “equals exact phrase” will focus users on relevant resources in the exact limited subject area of interest

Embed Subject Area's Items in Faculty Sites

Meet patrons where they are by exposing relevant materials from the library on other sites e.g. university or faculty sites



Introducing new widgets to expose relevant library resources using grid or carrousel Layout





Mary can do this

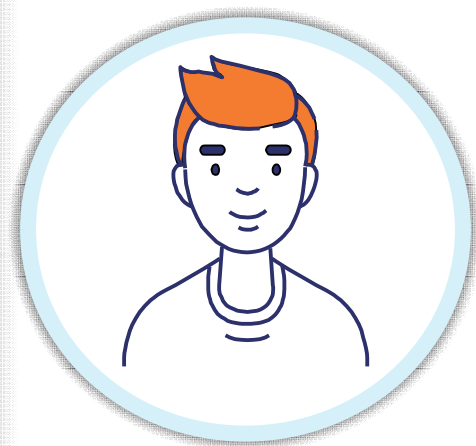
- ✓ Shape the discovery experience to promote her subject of area's items
- ✓ Reference students to subject area's items and to her as a specialist
- ✓ Expose items of interest in faculty sites
- ✓ Support student and research success

Exploring with Pat

Position: Researcher

Role: Conducting a research on the impact of video games on chocolate consumption

Desires: Pat is using the library services to find any relevant materials



Narrow Searches with Resource Types Filter Bar

Introduce new resource types filters under the search bar allowing users to easily narrow their search results by selecting from these main resource types

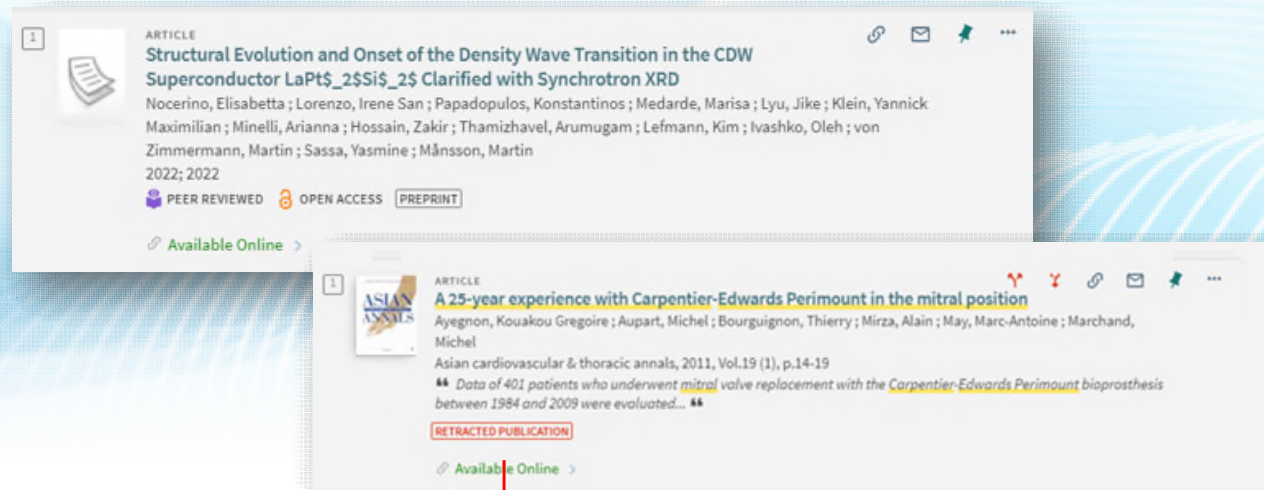
The screenshot shows a search interface for 'positive thinking' in a 'Library Catalog'. The search bar contains the text 'positive thinking' and a magnifying glass icon. Below the search bar, there are navigation tabs for 'All', 'Books', 'Articles', 'Journals', 'Images', 'Collections', and 'Video/Film'. The 'Books' tab is selected. The search results are displayed in a list format. The first result is a book titled 'Useful belief : because it's better than positive thinking' by Chris Helder, published in 2016. The second result is a book titled 'Positive thinking : find happiness and contentment through the power of positive thought' by Gill Hasson, published in 2017. On the right side of the search results, there is a 'Filter My Results' panel with several dropdown menus: 'Sort by' (set to Relevance), 'Show Only', 'Subject', 'Author/Creator', 'Library', 'Location', and 'Resource Type'. The 'Resource Type' filter is currently expanded, showing a list of resource types.

Library can select up to 10 resource types to show under Search Bar

Displaying Additional Documents Attributes

Provide more information about valuable attributes of records

- Initially indicate retracted articles and review articles. Future indications include primary source, pre-prints, publication addendums etc.
- Will allow patrons to filter by these attributes



Indicates the users that this document is **Retracted**

Help Pat Find Relevant Results using Citation

Enhanced citation query parsing based on open source AI tool

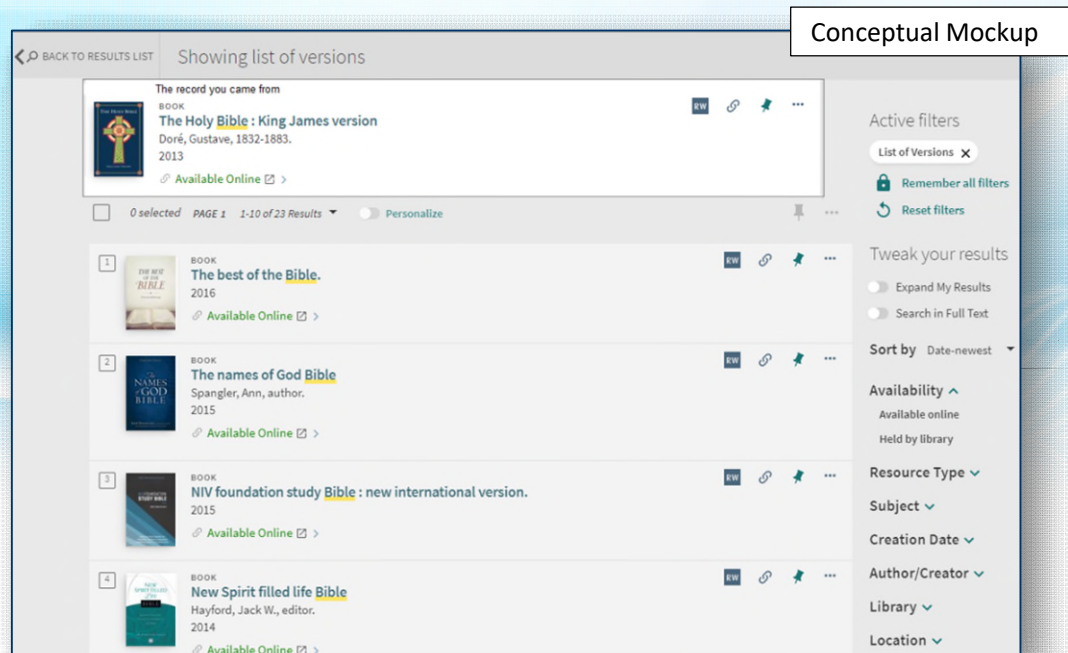
CDI – AI Assisted Citation Parsing:

Use of GROBID to identify and parse citation for more accurate results to account for typical style differences such as shortened names, pagination etc.

The screenshot displays a search interface with a search bar containing the query: "fleet: Temporal variability and drivers behind bluebottle. PLoS One, 17(3), e0265593." Below the search bar, there are filters for "All items", "that contain my query words", and "anywhere in the record". The results section shows "0 selected", "1-3 of 3 Results", and a "Personalize" toggle. The first result is an article titled "Driving the blue fleet: Temporal variability and drivers behind bluebottle (Physalia physalis) beachings off Sydney, Australia" by Bourg, Natacha; Schaeffer, Amandine; Cetina-Heredia, Paulina; Lawes, Jasmin C; Lee, Daniel; Hyrenbach, David. The article is from PLoS one, 2022, Vol.17 (3), p.e0265593-e0265593. It is marked as "PEER REVIEWED" and "OPEN ACCESS". There are links for "Get PDF", "Read Online", and "Available Online".

Highlight Preferred Record in the List of Versions

Better visibility in the FRBR version page

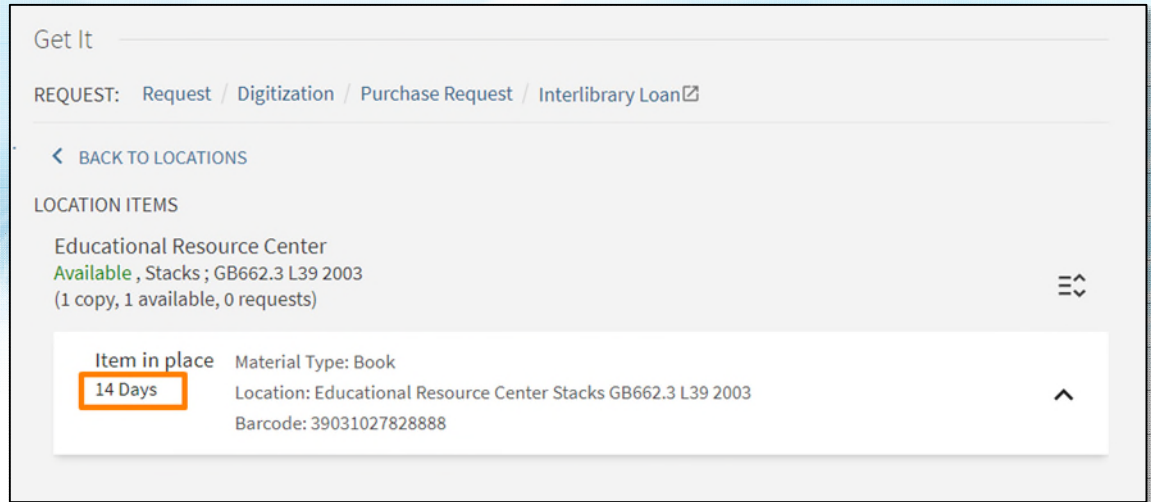


Better explain to users what version the came from when going into the FRBR version page

Display Item Policy

Provide more clarity for users by showing the Item policy

Display the Item Policy as a persistent attribute without requiring to sign in



The screenshot shows a library catalog interface. At the top, it says "Get It" with a search bar. Below that, there are links for "REQUEST: Request / Digitization / Purchase Request / Interlibrary Loan". A "BACK TO LOCATIONS" link is also present. The main section is titled "LOCATION ITEMS" and lists "Educational Resource Center" with the status "Available, Stacks; GB662.3 L39 2003" and "(1 copy, 1 available, 0 requests)". A detailed view of the item is shown below, with "Item in place" and "14 Days" highlighted in an orange box. Other details include "Material Type: Book", "Location: Educational Resource Center Stacks GB662.3 L39 2003", and "Barcode: 3903102782888".

Get It

REQUEST: [Request](#) / [Digitization](#) / [Purchase Request](#) / [Interlibrary Loan](#)

[← BACK TO LOCATIONS](#)

LOCATION ITEMS

Educational Resource Center
Available, Stacks; GB662.3 L39 2003
(1 copy, 1 available, 0 requests)

Item in place Material Type: Book
14 Days Location: Educational Resource Center Stacks GB662.3 L39 2003
Barcode: 3903102782888

Linked Data – Person Info Card

Enrich the Full Display with new Information Card about the bib persons from Wikidata

Utilize **Linked Data** URI's to dynamically present new Information Cards in a record's Full Display on related persons

BOOK

The old curiosity shop
[Dickens, Charles, 1812-1870.](#) ; Browne, Hablot Knight, 1815-1882.; Cattermole, George, 1800-1868. c1995

Available at Montana State University Library 3rd Floor (PR4566.A1 1995) >

Book reviews (1) >

Save and Export Options

- CITE THIS ITEM
- PERMALINK
- E-MAIL
- PRINT
- ENDNOTE DESKTOP
- SAVE TO ENDNOTE WEB
- EXPORT BIBTEX

Physical Availability and Request Options

Place a hold or request to borrow item: LOG IN

< BACK TO LOCATIONS

LOCATION ITEMS

Related Persons

- Charles Dickens**
English writer and social critic (1812-1870)
Born 02/07/1812
Died 06/09/1870
Wikipedia
- George Cattermole**
British artist (1800-1868)
Show more
- Hablot Knight Browne**
British artist (1815-1882)
Show more



Pat can do this



Use more searching and filtering options to better find most relevant materials



Better utilize library services



Focus on research and studies

Riding with Joe

Position: Primo Systems Admin

Role: He is responsible for improving library workflows for patrons

Desires: Joe wants to maximize the capabilities of library systems and make library resources available for different users

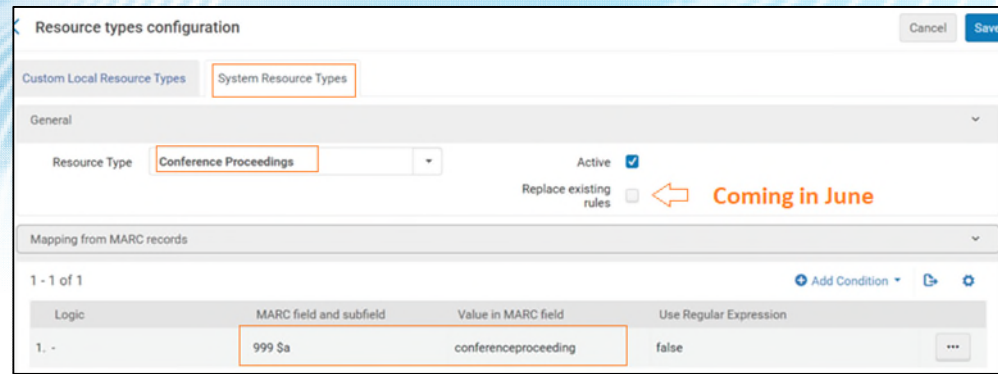


Utilize Tools and Configuration Options

Better shape patrons' discovery experience by defining primary and secondary resource types describing the library collection

Enhancing Resource Type Configuration

- Library can specify rules and conditions to define not only local resource types but also OTB types
- Allow defining secondary resource type conditions more easily for any primary type



The screenshot displays the 'Resource types configuration' interface. It features a 'System Resource Types' tab, a 'General' section with 'Resource Type' set to 'Conference Proceedings', and an 'Active' checkbox. A 'Replace existing rules' section is marked 'Coming in June'. Below, the 'Mapping from MARC records' section shows a table with one rule:

Logic	MARC field and subfield	Value in MARC field	Use Regular Expression
1. -	999 Sa	conferenceproceeding	false

Utilize Tools and Configuration Options

Better shape patrons' discovery experience by defining DEDUP / FRBR per your library needs

Dedup/FRBR Complete Key Combination

DEDUP FRBR

Alt + 1 Alt + 2 + Add Comp

Enabled	Complete Key	Type	Description
<input checked="" type="checkbox"/>	match/c5	1	External system number
<input checked="" type="checkbox"/>	match/f1 + match/f5 + match/f6	1	LCCN + brief title + year
<input checked="" type="checkbox"/>	match/f1 + FUZZY_STRING(match/f7) + match/f6	1	LCCN + fuzzy title + year
<input checked="" type="checkbox"/>	match/f1 + match/f7 + match/f6	1	LCCN + full title + pagination
<input checked="" type="checkbox"/>	search/oclc_unique_normalize_number + match/f5 + match/f6	1	OCLC + brief title + year
<input checked="" type="checkbox"/>	search/oclc_unique_normalize_number + FUZZY_STRING(match/f7) + match/f6	1	OCLC + fuzzy title + year
<input checked="" type="checkbox"/>	search/oclc_unique_normalize_number + match/f7 + match/f9	1	OCLC + full title + pagination
<input checked="" type="checkbox"/>	SPLIT(match/f3) + match/f5 + match/f6	1	ISBN + brief title + date

Enhancing FRBR/ DEDUP Configuration to include custom keys based on local fields

Key *

custom key / L1

Normalization Method

951

Optional Field

Add Key

Advanced Search – Barcode Search

Find specific records using item barcodes

The screenshot displays the Primo search results page for a barcode search. At the top, the search criteria are set to "BARCODE SEARCH" and the search term is "U188006641715". The search results show a book record: "Host bibliographic record for boundwith Item barcode U188006641715" published in 2022. The record is available at Arthur Lakes Library, U.S. Government Publications Collection (Floor 1) with 1 copy available and 0 requests. The interface includes options to cite or share the record, export it in various formats (BIBTEX, RIS, XML, ENDNOTE, REFSUGS), print, or create a citation. A yellow banner prompts the user to sign in to check for request options. The location and item information section shows the item is in place and loanable at Arthur Lakes Library, U.S. Government Publications Collection (Floor 1) with 1 copy available and 0 requests. The barcode "U188006641715" is highlighted in the item information section.

Use Primo for library staff that are students to utilize the barcode search from the search instead of Alma admin access



Joe can do this



Customize Primo to best fit the institution patrons needs



Maximize the Primo functionality

Strolling with Alexandra

Position: Collection Manager

Role: She is responsible for special collections in her library

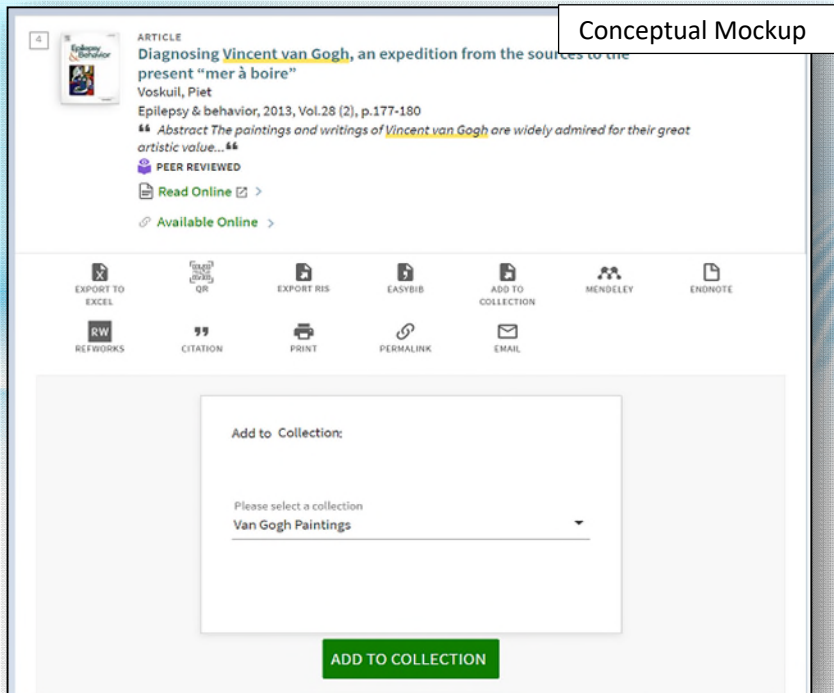
Desires: Alexandra really wants to have her rich collections discoverable and used by patrons



Expand Collection Discovery

Include additional resources as part of collections displayed via the Collection Discovery

Conceptual Mockup



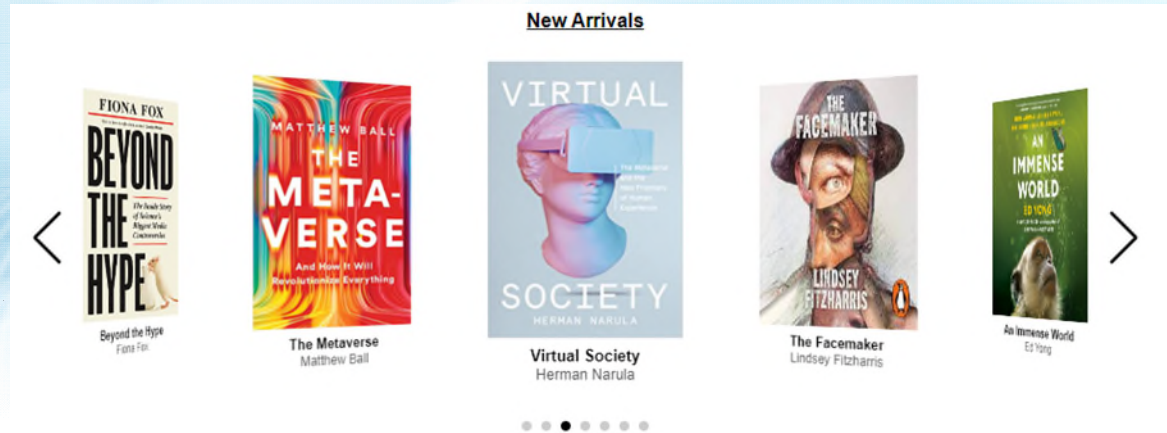
The screenshot shows a library interface for an article. The article title is "Diagnosing Vincent van Gogh, an expedition from the sources to the present 'mer à boire'" by Voskuil, Piet. It is from "Epilepsy & behavior", 2013, Vol.28 (2), p.177-180. The abstract states: "Abstract The paintings and writings of Vincent van Gogh are widely admired for their great artistic value...". The article is marked as "PEER REVIEWED" and has a "Read Online" link. Below the article information is a row of icons for various actions: EXPORT TO EXCEL, EXPORT RIS, EASYBIB, ADD TO COLLECTION, MENDELEY, ENDNOTE, REWORKS, CITATION, PRINT, PERMALINK, and EMAIL. A dialog box titled "Add to Collection:" is open, prompting the user to "Please select a collection" from a dropdown menu. The dropdown menu currently shows "Van Gogh Paintings". A green "ADD TO COLLECTION" button is at the bottom of the dialog.

Allow Collection Manager to add to a specific selected CDI records or external records to the Collection Discovery

Expose Library Materials

Expose libraries unique special collections by meeting patrons where they are on other university pages

Embed and easily integrate library resources in other sites such as University / Faculty / LibGuides websites using grid or carrousel Layout



Analytics – Track Collection Usage

Understand how collections are used

Collection Name	Total actions on collection
Art Collection	553
Vogue Van Gogh Digitized Paintings	454
Theses and dissertations	440
New Arrivals	357
Picasso Collection - books and reproductions	340
Music Collection	330
Posters	325
Honors Theses	254
Graduation Thesis	232
Finding Aids	210
Ancient Maps Collection	202

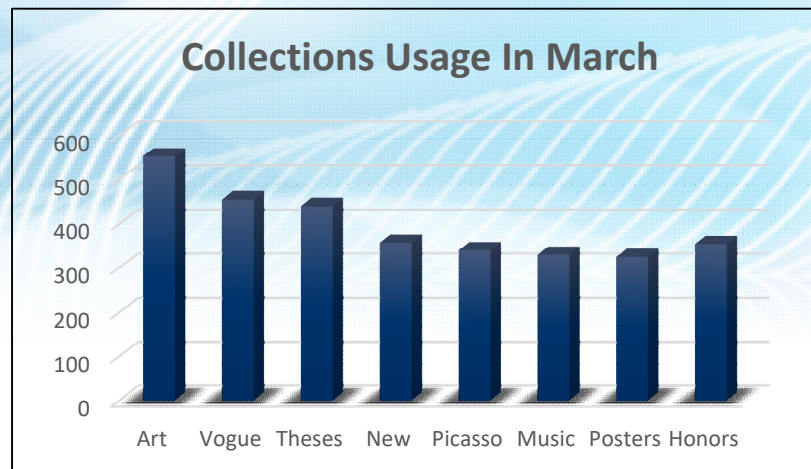
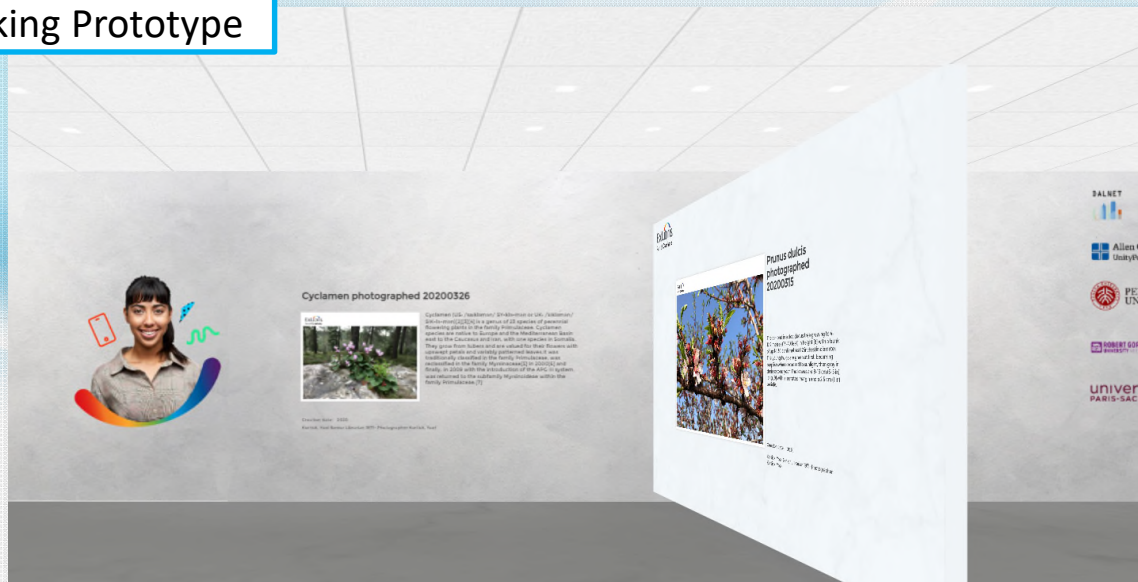


Exhibit Special Collections

Integration with 3rd party to easily set up an exhibition display from your collection

Working Prototype

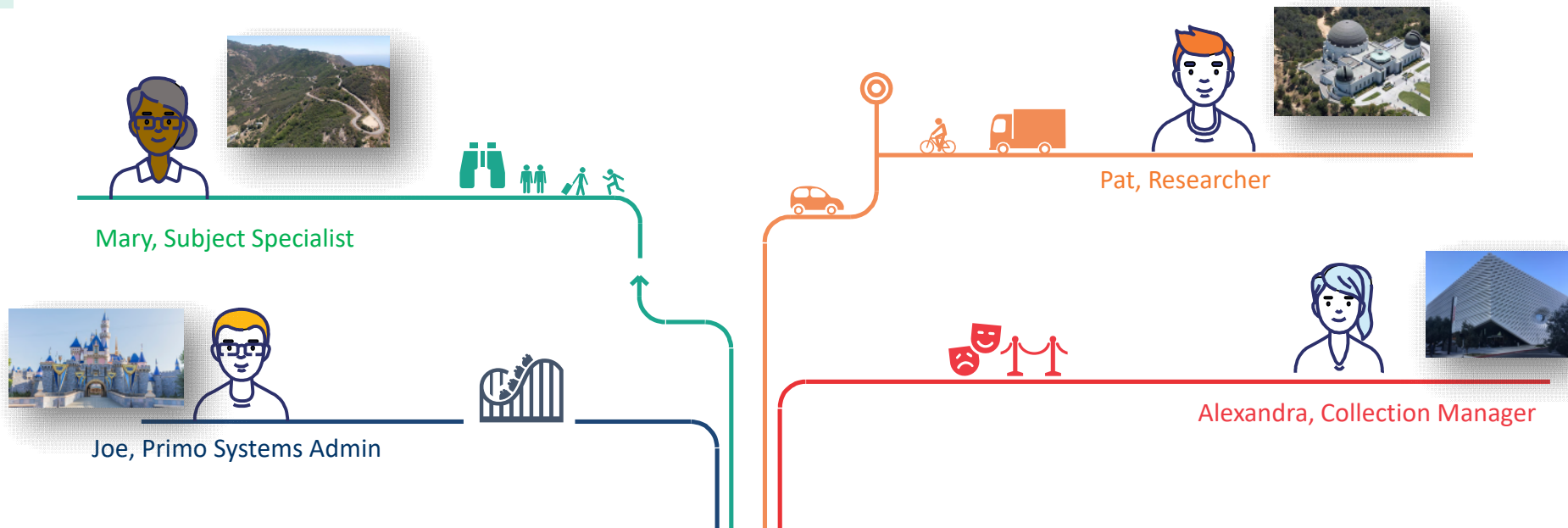


Alexandra can do this



- ✓ Broaden the collection by adding relevant electronic materials to Collection Discovery
- ✓ Expose the collections to users
- ✓ Understand which collections are being viewed

A Rewarding Journey with Different Users



User's story

What location are they exploring ?

Don't miss the top attractions

Thank you!

Yisrael.Kuchar@Clarivate.com

