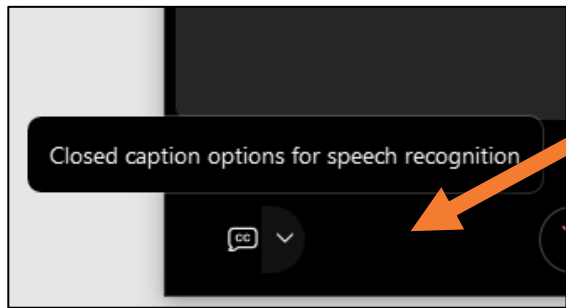
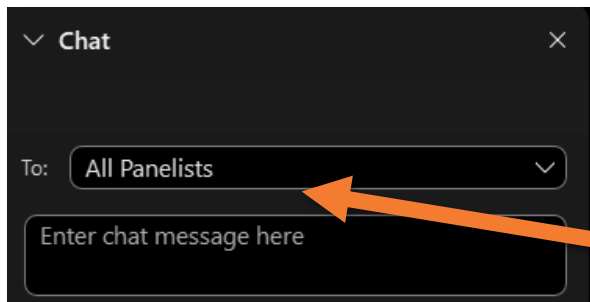




How Primo Works

A few points about WebEx

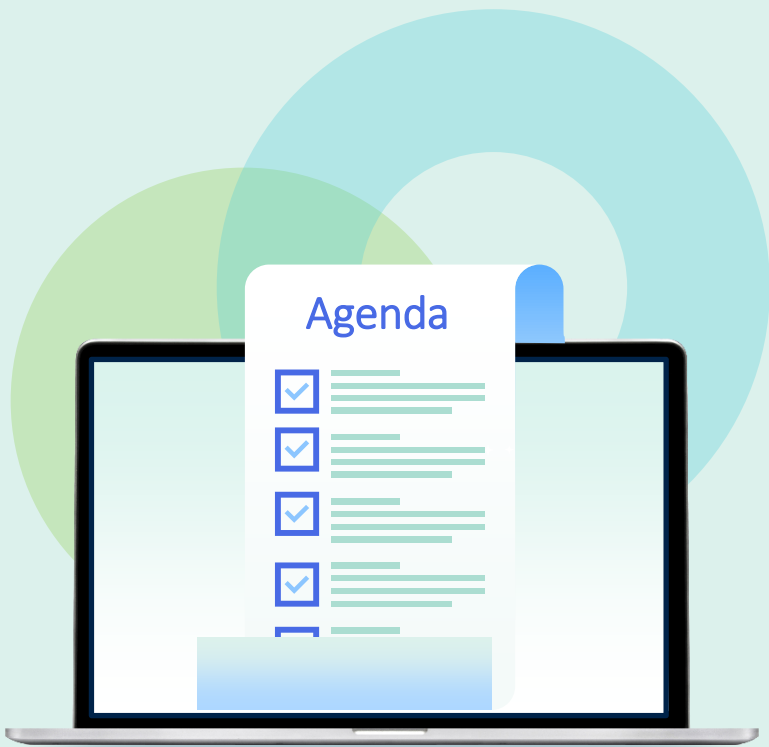


- Technical issues? Exit and rejoin the WebEx session.
- Submit questions via WebEx Chat: Select **All Panelists** in the **To:** dropdown menu
- Turn captions on and off in the lower-left corner of the WebEx screen

Session Topics

	Session	Date
1	How Primo Works	Jan 11
2	Search Configuration	Jan 18
3	Search Interfaces	Jan 25
4	Display	Feb 1
5	Delivery	Feb 8
6	Local Data	Feb 15
7	Dedup and FRBR	Feb 22
8	Primo Analytics	Feb 29
Exam for Certificate of Completion		





- **Resources in Primo, Alma, & CDI**
- How Search Works
- How Ranking Works
- User Experience

How your local records work with discovery

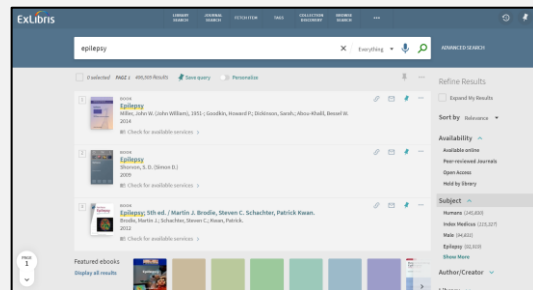
Library Collections

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



Indexed
within 15
minutes

Primo User Interface



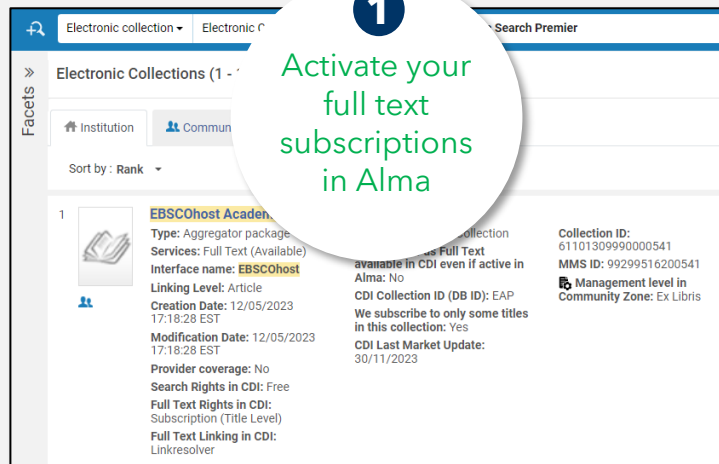
How the Central Discovery Index works with discovery

Ex Libris ingests all available collections and titles into the KnowledgeBase



1

Activate your full text subscriptions in Alma



2

CDI matches active titles with ALL metadata in the index

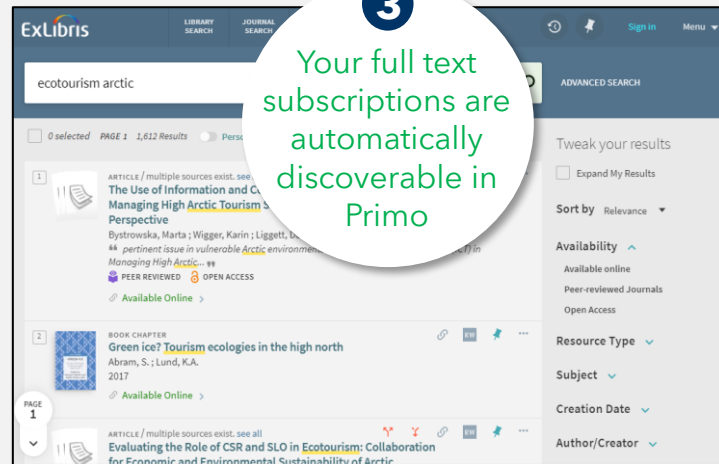


Ex Libris ingests article (book, book chapter) metadata from different sources and deduplicates it in CDI

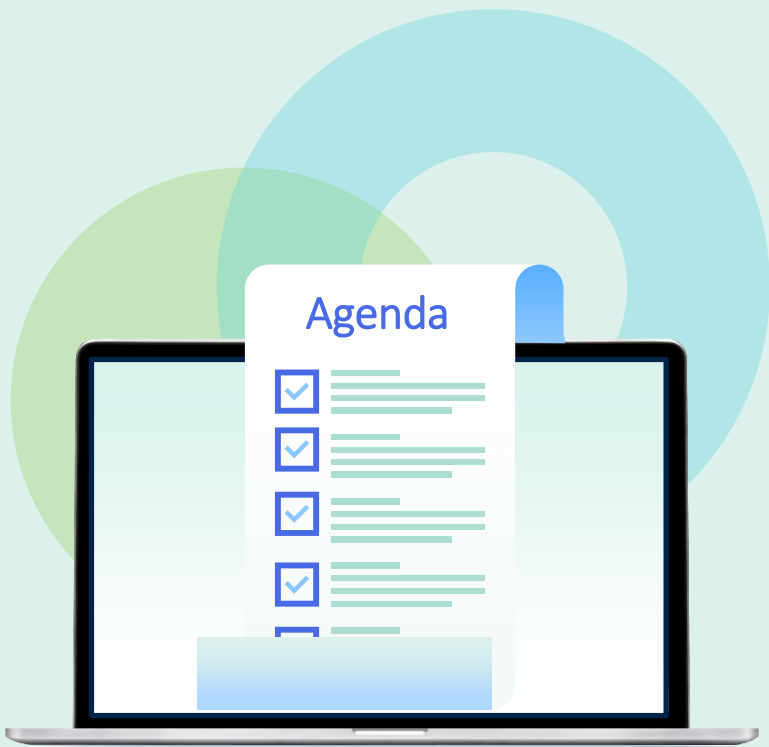


3

Your full text subscriptions are automatically discoverable in Primo



Within 48 hours



- Resources in Primo, Alma, & CDI
- **How Search Works**
- How Ranking Works
- User Experience

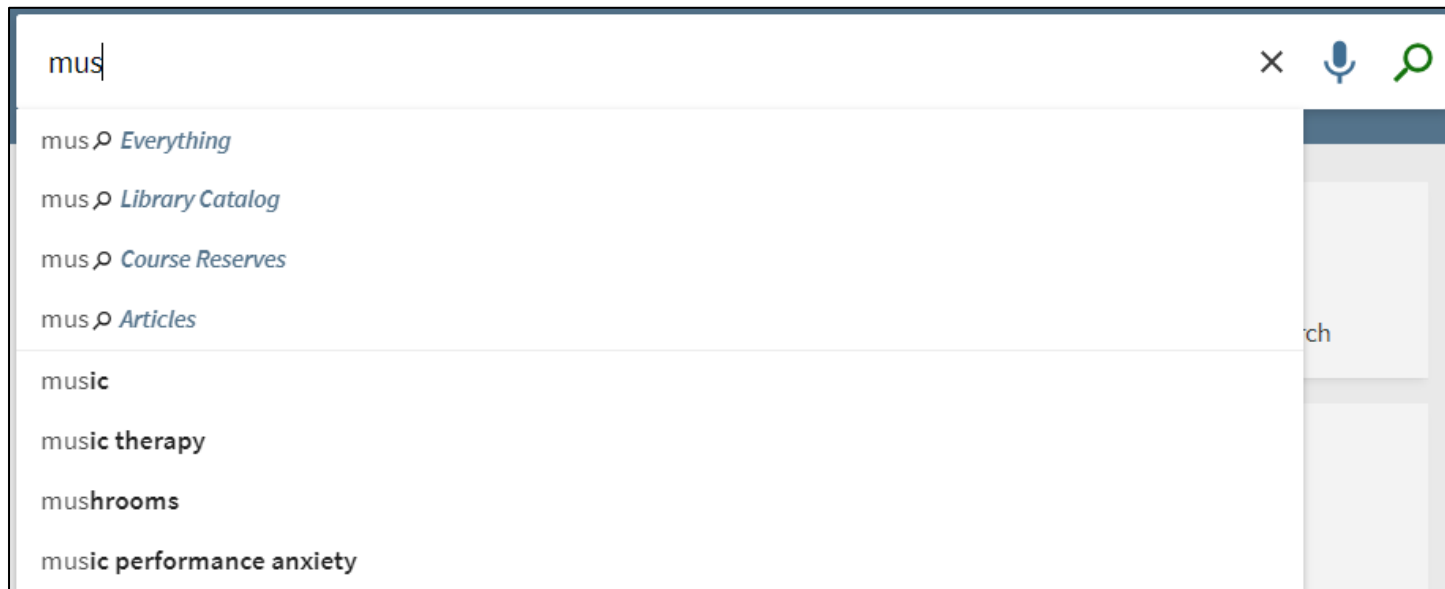
How Search Works

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



Automatic Search Optimizations

Suggested Search Terms–Autocomplete



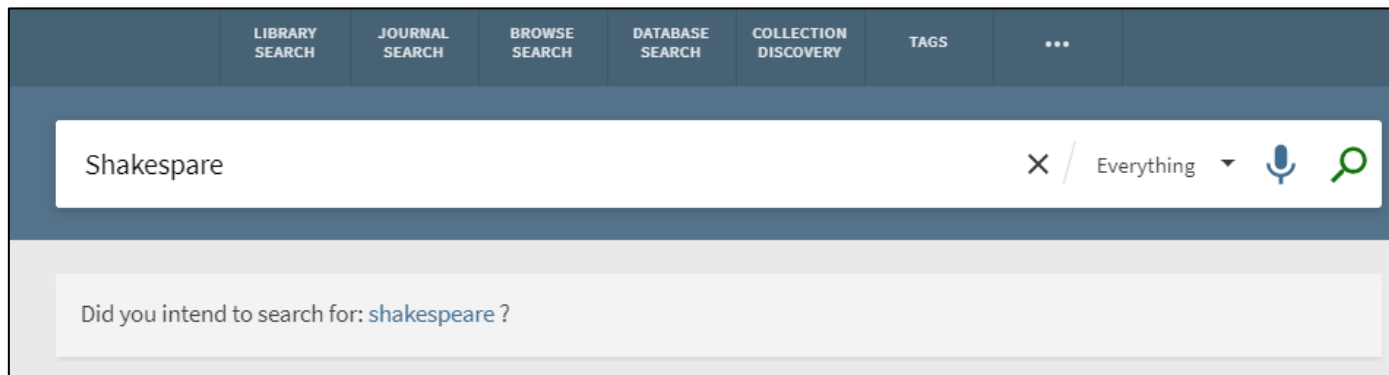
Automatic Search Optimizations

Suggested Search Terms–Controlled Vocabulary

The screenshot shows a search interface with a search bar at the top containing the text "heart attack". To the right of the search bar are icons for a close button (X), a filter dropdown (Articles), and a search icon (magnifying glass). Below the search bar, a red rectangular box highlights a suggested search term: "Including 'myocardial infarction'. Just search *heart attack*". Below this suggestion, the search results are displayed. The first result is labeled "PAGE 1 1,619,089 Results" and includes a "Save query" button. The result itself is a "REFERENCE ENTRY" titled "heart attack" from 2017, published by Encyclopædia Britannica, Inc. The entry includes a snippet of text: "information on heart attack, visit Britannica... A heart attack results from obstruction of the... facilitate the onset of a heart attack upon waking...". At the bottom of the result, there is a link labeled "Available Online" with a right-pointing arrow. To the right of the result, there are icons for linking, quoting, emailing, pinning, and a menu.

Automatic Search Optimizations

Suggested Search Terms–Spelling Corrections and Synonyms



The screenshot shows a library search interface with a dark blue header containing navigation tabs: LIBRARY SEARCH, JOURNAL SEARCH, BROWSE SEARCH, DATABASE SEARCH, COLLECTION DISCOVERY, TAGS, and a menu icon. Below the header is a search bar with the text "Shakespeare". To the right of the search bar are icons for clearing the search (X), a dropdown menu (Everything), a microphone icon, and a magnifying glass icon. Below the search bar, a light gray box displays the suggestion: "Did you intend to search for: [shakespeare](#) ?".

Synonyms

- 5th or fifth
- color or colour
- theater or theatre

Automatic Search Optimizations

Suggested Search Terms–Stop Words

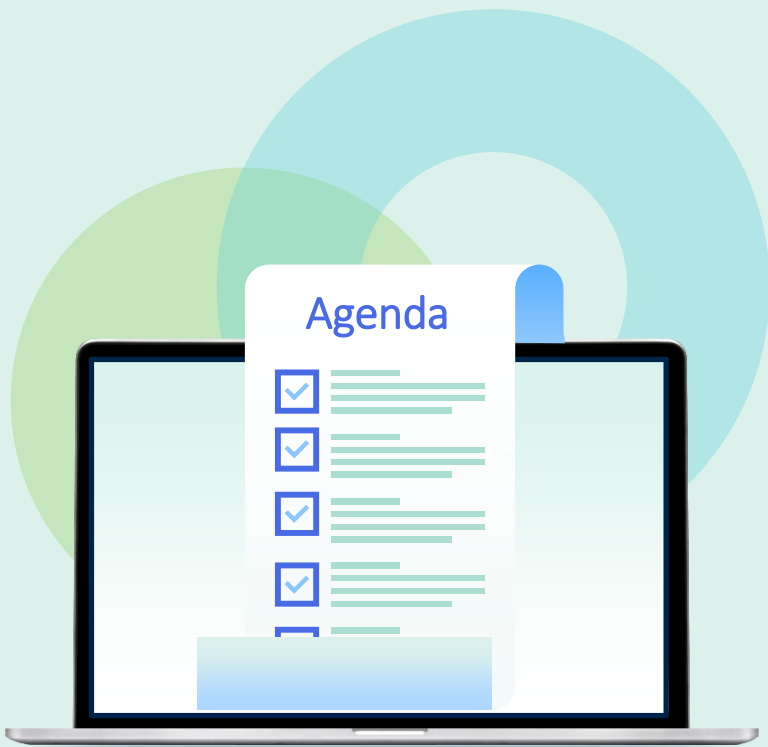
- A
- An
- The
- And
- But
- Or
- It
- Of
- On
- With
- In
- Is
- Are
- ...[and more](#)

Restricted User Groups

- Restricts groups of users from accessing restricted Central Discovery Index collections and EBSCO Search
- If user is part of restricted group, they will not have access unless on campus
- Example: alumni with 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

- How users can affect ranking of results
- How CDI results are ranked
- How local records are ranked
- How blended results are ranked



How CDI Results are Ranked

Dynamic Rank (applies to query)	Static Rank (value of the item)
Field weighting	Resource type
Term weighting	Publication date
Term frequency and field length	Scholarly/Peer review
Verbatim match boost	Citation counts
Phrase and proximity match boost	Journal rank
Exact title and title+subtitle match boost	Anonymous author
Known item search boost	

How Blended Results are Ranked

Blended search profiles include more than one search scope.

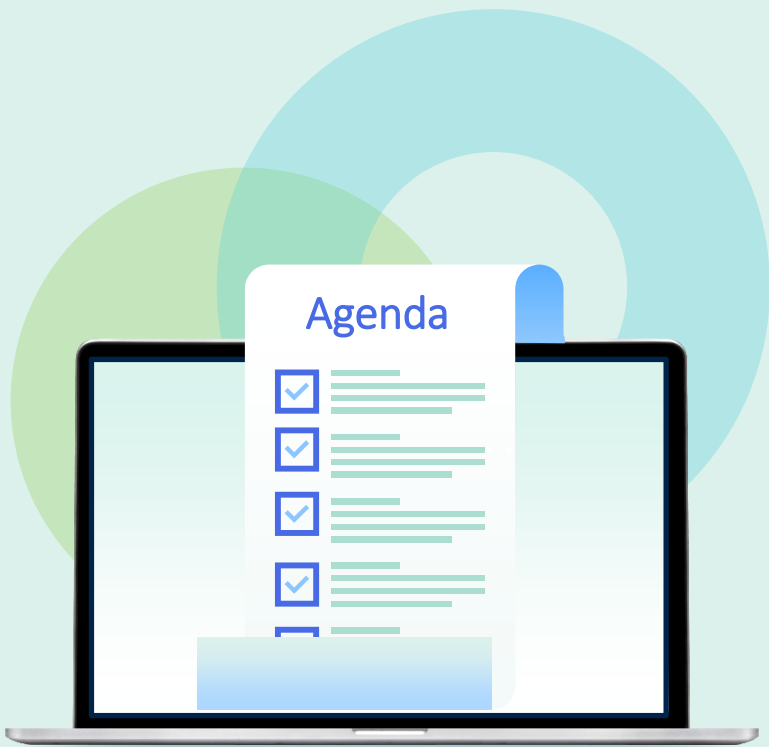
Search Profiles Back

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

View
Edit
Configure blending

< Edit blending configuration for Search profile: MyInst_and_CI Back

Enabled	Search engine	Boost type	Settings	
1	<input checked="" type="checkbox"/> Local	Boost	Boost records with a medium score - Boost position: top - Number of results to boost: 5 - Boost factor: 2.5	...
2	<input type="checkbox"/> Central Index	-	-	...



- Resources in Primo, Alma, & CDI
- How Search Works
- How Ranking Works
- **User Experience**

User Experience Optimization

- Links in main menu
- Labels
- Search configuration
- Search results configuration
- Brief and full record configuration
- Topic Overview
- Resource Recommender



Topic Overview

X

Everything

ADVANCED SEARCH

All items

that contain my query words

anywhere in the record

results

results

ce

ABOUT THE TOPIC

Antarctica

Geography of Energy. Antarctica is the coldest, darkest, and least populated of the seven continents. If energy efficiency and renewable energy can be deployed widely here, it is hoped that they can be deployed on more populated and less isolated continents. Covering 8.6 million square miles (12.8 million square kilometers), Antarctica has a surface area of land 50 percent larger than the ...VIEW MORE

Source: Encyclopedia of Energy

Created: 2013

Full text available >


Resource Recommender

linguistics X / Library Catalog 🔍

SUGGESTED DATABASE

ProQuest Linguistics Database
[Go to database](#)

SUGGESTED WEBSITE

 Linguistic Society of America :
Advancing the Scientific Study of
Language since 1924
[Linguistic Society of America](#)

E-Collection

Website

library hours X / Library Catalog 🔍

LIBRARY INFORMATION

Library Hours
[Ex Libris Institute Homepage](#)
Open Monday thru Friday 8 am - 8 pm; Saturday and Sunday 10 am - 4 pm

Library Information

lichen identification X / Everything 🔍

SUGGESTED LIBRARIAN

Jean Dill
Experienced in identifying wildflowers, trees, lichens, mushrooms, birds, and other wildlife.

Person

electronic resource management X / Everything 🔍

LIBRARY GUIDE

[Ex Libris' Resource Management LibGuide](#)

Library Guide



Resources

Knowledge Center Resources

- [Primo VE Documentation](#)
- [Reference Entries for Topic Overview](#)
- [Resource Recommender](#)

- [Alma Search Indexes](#)
- [Configuring Search Indexes in Alma](#)

About Today's Session, and Register for Next Week

[Ex Libris Knowledge Center](#) > [Primo](#) > [Training](#) > [Webinars](#) > [Primo VE : Become an Expert](#)



- Download these presentation slides
- Watch the recording of this session
- View Questions and Answers
- Register for upcoming sessions
(and see what content they will contain)

Next Week: Search Configuration



- Search Scopes, Profiles, and Slots
- Basic & Advanced Search
- Ranking & Blending
- Restricted Groups

Ex Libris Webinars

- Check out the newly redesigned webinars homepage
- Discover and register for upcoming sessions
- View recordings of previous sessions
- Filter and search for relevant resources

<https://exlibrisgroup.com/customer-education-webinars>



Thank you!

Please fill out the survey that will appear
when you close the WebEx meeting

