



End User Guide (New UI)

August 2016 - DRAFT

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Table of Contents



[Download PDF of Guide](#)

This section includes:

- [Performing Basic Searches](#)
- [Performing Advanced Searches](#)
- [Using Browse](#)
- [Your Space in Primo](#)
- [Using My Favorites](#)
- [Using the Brief Results](#)

Performing Basic Searches

You can search very easily in Primo. Just type one or more words that you are looking for and click the **Search** button. If you enter multiple words, Primo will return results that contain all of the specified terms.

Once you are familiar with the basic Primo search, you might want to try doing more with the Search panel or use the Advanced Search option (see [Performing Advanced Searches](#)). Both of these options offer numerous features for making your searches more precise and enable you to get results that are more useful.

NOTE: You may search for titles using ISBNs and ISSNs with or without hyphens. If you are not getting expected results with hyphens, please try your search again without hyphens.

How Can I Do More with the Search Panel?

You can do more than just a simple search with the Search panel by placing the following operators between words or phrases: **AND**, **OR**, and **NOT**. Searches with multiple operators are processed in the following order, from left to right:

1. **()** – Parentheses allow you to group search terms and alter the order of precedence. For more information, see [Grouping Terms Within a Query](#).
2. **AND** and **NOT** – left-to-right precedence is used in case of multiple operators.
3. **OR** – left-to-right precedence is used in case of multiple operators.

Although operators provide greater control over the search, the full search string is no longer treated as a phrase and search enhancements (such as inflection of a phrase based on correlation statistics) will not be applied to the query. For example, the following queries are treated differently even though they appear to be identical:

- **honey bee communication** – Primo treats the entire query as a phrase and returns results in which all of the words may be closer together.
- **honey bee AND communication** – Primo treats **honey bee** and **communication** as separate phrases and returns results in which both phrases may not be as close together.

For information on specifying exact phrases, see [Searching for a Phrase](#).

NOTE:

- Primo assumes that you are searching for all of the words unless you type **OR** or **NOT** between words and phrases.
 - For right-to-left languages (such as Hebrew), the precedence is right-to-left.
 - Searches are not case-sensitive.
-

To become familiar with the operators and get the best results from your searches, refer to the following sections:

- [Searching for a Phrase](#)
 - [Searching for Any Specified Words or Phrases](#)
 - [Excluding Words or Phrases](#)
 - [Searching Using Wildcard Characters](#)
 - [Grouping Terms Within a Query](#)
 - [Selecting Your Search Scope](#)
 - [Using the Primo Central Search Scope](#)
-

Searching for a Phrase

To search for an exact phrase, type quotation marks around the phrase. You can combine both words and phrases in your search.

NOTE: If you do not enclose the phrase with quotation marks, the system will find items that contain the individual words in the phrase, regardless of whether these words are located next to each other in the order specified.

For example, to search for global warming as one term, type the following in the search box:



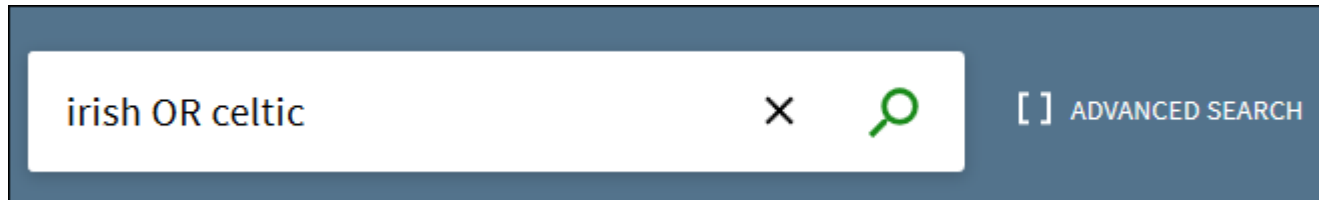
The image shows a search interface with a dark blue background. A white search box contains the text "global warming" in quotes. To the right of the text is a small 'X' icon for clearing the search. Further right is a green magnifying glass icon for searching. To the far right, there is a link that says "[] ADVANCED SEARCH".

Searching for Any Specified Words or Phrases

You can search for items that contain at least one of the words or phrases you type in the Search box. To do so, type **OR** between the words or phrases.

NOTE: If you search for words or phrases without specifying **OR** or **NOT**, Primo assumes that you are searching for all the specified words or phrases.

For example, to search for items with the word **Irish** or the word **Celtic**, type the following in the search box:

A screenshot of a search interface. It features a dark blue header bar. On the left, a white search input box contains the text "irish OR celtic". To the right of the input box is a small black "X" icon for clearing the search. Further right is a green magnifying glass icon. To the right of the magnifying glass is a link that says "[] ADVANCED SEARCH" in white text on the dark blue background.

NOTE: To use Boolean operators (AND, OR, NOT) within search phrases, you must enter them in uppercase letters. Otherwise, Primo removes them and performs a simple search that includes all search phrases.

Excluding Words or Phrases

You can exclude items that contain specific words or phrases. To do so, type **NOT** and then type the word or phrase to exclude.

NOTE: If you search for words or phrases without specifying **OR** or **NOT**, Primo assumes that you are searching for all of the specified words or phrases.

For example, to search for items with the word **Celtic** and exclude any of these items with the word **Irish**, type the following in the search box:

A screenshot of a search interface, similar to the one above. It features a dark blue header bar. On the left, a white search input box contains the text "celtic NOT irish". To the right of the input box is a small black "X" icon for clearing the search. Further right is a green magnifying glass icon. To the right of the magnifying glass is a link that says "[] ADVANCED SEARCH" in white text on the dark blue background.

NOTE: If parentheses are not used for a query that contains multiple operators, it is recommended that you use the **NOT** operator last to ensure that results are excluded from the entire query. For example: *cycling AND safety NOT helmet*. If it is necessary to place the **NOT** operator elsewhere, make sure that you enclose the operation with parentheses. For example: *(cycling NOT safety) OR helmet*.

Searching Using Wildcard Characters

You can include the following wildcard characters in your searches:

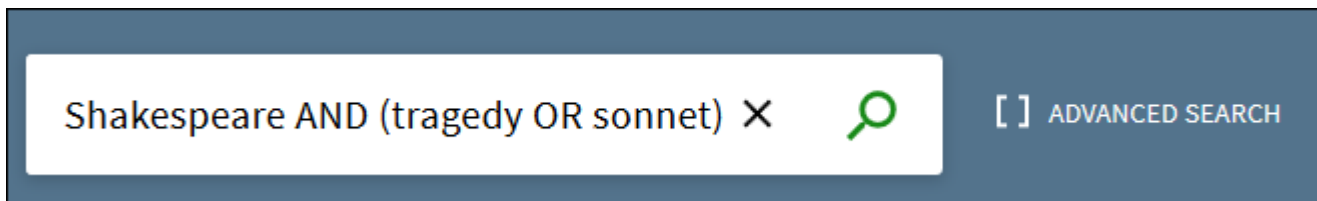
- **?** – enter a question mark to perform a single character wildcard search. For example, type **wom?n** to search for records that contain the strings **woman**, **women**, and so forth.
- ***** – enter an asterisk to perform a multiple character wildcard search. For example, type **cultur*** to search for records that contain strings, such as **culture**, **cultural**, and **culturally**.

NOTE: The system ignores wildcard characters placed at the beginning of search terms. For example, the system treats the search terms **?aying** and ***aying** as if you had searched for **aying**.

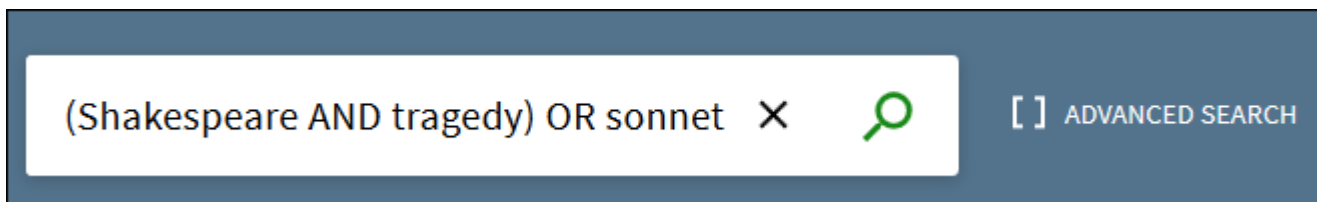
Grouping Terms Within a Query

You can use parentheses to group terms to clarify the order of multiple operators specified in a query.

Example 1: The following query searches for records that contain **Shakespeare** and either **tragedy** or **sonnet**:

A screenshot of a search interface. It features a dark blue header bar. Inside this bar is a white search input field containing the text "Shakespeare AND (tragedy OR sonnet)". To the right of the input field is a green magnifying glass icon and a small "X" icon. Further to the right, within the same header bar, is a link that says "[] ADVANCED SEARCH".

When using more than one operator, it is strongly recommended to use parentheses to clarify precedence. For example, if no parentheses are specified in the above query, Primo will apply the precedence rules (see [precedence rules](#)) and instead group the words **Shakespeare** and **tragedy** as follows:

A screenshot of a search interface, similar to the one above. It features a dark blue header bar. Inside this bar is a white search input field containing the text "(Shakespeare AND tragedy) OR sonnet". To the right of the input field is a green magnifying glass icon and a small "X" icon. Further to the right, within the same header bar, is a link that says "[] ADVANCED SEARCH".

NOTE: After the results are returned, Primo will display the altered query in the search box so that you can decide whether to modify and re-execute your query to get expected results.

Example 2: The following query searches for records that contain either **Irish** or **Celtic** and do not contain **Gaelic**:

(Irish OR Celtic) NOT Gaelic

×

[] ADVANCED SEARCH

If no parentheses are specified in the above query, Primo will apply the precedence rules and instead group the words **Celtic** and **Gaelic** as follows:

Irish OR (Celtic NOT Gaelic)

×

[] ADVANCED SEARCH

Selecting Your Search Scope

The search scope defines where the system should perform the search. A default search scope is predefined based on your login, usually corresponding to your major field of study or some other criteria set up by the institution. However, you can change the scope of your search by selecting a search scope from the drop-down list as shown in the following example.

ExLibris

LIBRARY SEARCH

A-Z

shakespeare

×

Local Search

▼

Primo Local Repository

Digital resources

White Shore University

Volcano Island University

Reef University

1,910 Results

1

BOOK

Shakespeare

Walter Alexander Raleigh Sir, 1861-1922. 1907

Available at Volcano Campus Fun Library General

Online access

>

Using the Primo Central Search Scope

Primo Central is a centralized search index that encompasses tens of millions of records of global or regional significance that are harvested from primary and secondary publishers and aggregators. To search from these resources, select the **Primo Central** search scope or a search scope that includes it.

If you want to receive results for Primo Central items that do not contain full text, select the Expand beyond library collections check box.

The screenshot displays the Primo Central search interface. At the top, a search bar contains the text "stress test". To the right of the search bar are dropdown menus for "Primo Central" and "PC", followed by a magnifying glass icon and a link to "ADVANCED SEARCH". Below the search bar, it indicates "565 Results". On the right side, there is a section titled "Tweak my results" which contains a checkbox labeled "Expand My Results" (highlighted with a red box) and a "Sort by" dropdown menu currently set to "Relevance". The main results area shows a list of results, with the first result being an article titled "Science in Japan - Stress test" from Swetswise Online Content, published in The Economist in 2014.

stress test X Primo Central PC [] ADVANCED SEARCH

565 Results

Tweak my results

☐ Expand My Results

Sort by Relevance

1 ARTICLE
Science in Japan - Stress test
Swetswise Online Content (Swets Information Services BV) ISSN: 0013-0613
The economist, 2014, Vol.412(8899), pp.61-60

Performing Advanced Searches

The Advanced Search page allows you to create more complex searches by combining multiple search boxes, which are separated by an operator.

The screenshot shows the ExLibris Advanced Search interface. At the top, there are radio buttons for 'Local Search' (selected), 'Remote Search', and 'Primo Central'. To the right is a 'Search Scope' dropdown set to 'Primo Local Repository'. On the far right is a 'SIMPLE SEARCH' link. Below these are two main sections. The left section is for building the search query, featuring a 'Field Selector' (dropdown set to 'Any field'), an 'Operator' (dropdown set to 'AND'), a 'Search Type' (dropdown set to 'contains'), and a 'Search Box' (text input). A '+ ADD A NEW LINE' button is at the bottom left of this section. The right section is for filters, with a 'Filters' label at the bottom. It includes dropdowns for 'Material Type' (set to 'All items'), 'Language' (set to 'Any language'), and 'Publication Date' (set to 'Any year'). Red arrows point from labels to specific UI elements: 'Field Selector' to the first dropdown, 'Search Tabs' to the radio buttons, 'Operator' to the second dropdown, 'Search Type' to the third dropdown, 'Search Box' to the text input, and 'Filters' to the filter section.

Advanced Search Options

In addition to the capabilities provided with the basic search (see [Performing Basic Searches](#)), you can specify the following options:

- **Field selector** – For each search box, this parameter allows you to narrow the search to all search fields or a particular field (such as title and subject).
- **Search type** – For each search box, this parameter indicates whether the phrases in your query are treated as phrases or exact phrases. The following values are valid:

NOTE: If your query includes operators that separate phrases in which one or both of the phrases contain multiple words, Primo will use parentheses to group the words in each multiple-word phrase. For example, Primo will convert the query **Donald Duck OR Disney** to **(Donald Duck) OR Disney** to distinguish it from the following query: **Donald (Duck OR Disney)**.

- **is (exact)** – Returns results that contain phrases that exactly match the phrases specified in the query.
- **contains** – Returns results that contain all words in the phrase, but the words may be in a different order and may not be as close together.

- **starts with** – Returns results that contain words that start with the specified string.
- **Operators** – As with basic searches, you can include the following operators between words and phrases in each search box: **AND**, **OR**, and **NOT**. In addition, the **Operator** drop-down list allows you to select the operation that is used between search boxes. For more information on operator precedence, see [Precedence Rules](#).
- **Filters** – Advanced searches allow you to apply various filters (such as material type and date ranges) to your initial queries.

In the following example, matching records must contain either the words **Donald** and **Duck** or the words **Mickey** and **Mouse** in the title, and the subject of the records must not have the exact phrase **Amusement Parks**. From the matching records, only the English articles are displayed in the results.

The screenshot shows an advanced search interface. At the top, there are three radio buttons for 'Search for': 'Local Search' (selected), 'Remote Search', and 'Primo Central'. To the right, 'Search Scope' is set to 'Primo Local Repository'. On the far right, there is a 'SIMPLE SEARCH' link. The main search area contains two rows of criteria. The first row has 'Title' selected from a dropdown, followed by 'contains' from another dropdown, and the text '(Donal Duck) OR (Mickey Mouse)'. The second row has 'NOT' selected from a dropdown, followed by 'Subject' from another dropdown, then 'is (exact)' from a third dropdown, and the text 'Amusement Parks'. Below these rows are two buttons: '+ ADD A NEW LINE' and 'CLEAR'. To the right of the search criteria, there are three filter dropdowns: 'Material Type' set to 'Articles', 'Language' set to 'English', and 'Publication Date' set to 'Any year'. At the bottom, a green arrow points to the constructed search string: 'Title contains (Donal Duck) OR (Mickey Mouse) NOT Subject is (exact) Amusement Parks'. To the right of this string is a green magnifying glass icon and the word 'SEARCH'.

Advanced Search Example with Operators

Performing Advanced Searches

The Advanced Search page allows you to create more complex searches by combining multiple search boxes, which are separated by an operator.

The screenshot shows the ExLibris Advanced Search interface. At the top, there are radio buttons for 'Local Search' (selected), 'Remote Search', and 'Primo Central'. To the right is a 'Search Scope' dropdown set to 'Primo Local Repository'. On the far right is a 'SIMPLE SEARCH' link. Below these are two main sections. The left section is for building the search query, featuring a 'Field Selector' (dropdown set to 'Any field'), an 'Operator' (dropdown set to 'AND'), a 'Search Type' (dropdown set to 'contains'), and a 'Search Box' (text input). A '+ ADD A NEW LINE' button is at the bottom left of this section. The right section is for 'Filters', with dropdowns for 'Material Type' (set to 'All items'), 'Language' (set to 'Any language'), and 'Publication Date' (set to 'Any year'). Red arrows and labels point to various elements: 'Field Selector' points to the first dropdown; 'Search Tabs' points to the radio buttons; 'Operator' points to the 'AND' dropdown; 'Search Type' points to the 'contains' dropdown; 'Search Box' points to the text input; and 'Filters' points to the filter section.

Advanced Search Options

In addition to the capabilities provided with the basic search (see [Performing Basic Searches](#)), you can specify the following options:

- **Field selector** – For each search box, this parameter allows you to narrow the search to all search fields or a particular field (such as title and subject).
- **Search type** – For each search box, this parameter indicates whether the phrases in your query are treated as phrases or exact phrases. The following values are valid:

NOTE: If your query includes operators that separate phrases in which one or both of the phrases contain multiple words, Primo will use parentheses to group the words in each multiple-word phrase. For example, Primo will convert the query **Donald Duck OR Disney** to **(Donald Duck) OR Disney** to distinguish it from the following query: **Donald (Duck OR Disney)**.

- **is (exact)** – Returns results that contain phrases that exactly match the phrases specified in the query.
- **contains** – Returns results that contain all words in the phrase, but the words may be in a different order and may not be as close together.

- **starts with** – Returns results that contain words that start with the specified string.
- **Operators** – As with basic searches, you can include the following operators between words and phrases in each search box: **AND**, **OR**, and **NOT**. In addition, the **Operator** drop-down list allows you to select the operation that is used between search boxes. For more information on operator precedence, see [Precedence Rules](#).
- **Filters** – Advanced searches allow you to apply various filters (such as material type and date ranges) to your initial queries.

In the following example, matching records must contain either the words **Donald** and **Duck** or the words **Mickey** and **Mouse** in the title, and the subject of the records must not have the exact phrase **Amusement Parks**. From the matching records, only the English articles are displayed in the results.

The screenshot shows an advanced search interface. At the top, there are three radio buttons for 'Search for': 'Local Search' (selected), 'Remote Search', and 'Primo Central'. To the right, 'Search Scope' is set to 'Primo Local Repository'. On the far right, there is a toggle for 'SIMPLE SEARCH'. The main search area contains two rows of criteria. The first row has 'Title' selected from a dropdown, followed by 'contains' from another dropdown, and the text '(Donal Duck) OR (Mickey Mouse)'. The second row has 'NOT' selected from a dropdown, followed by 'Subject' from another dropdown, 'is (exact)' from a third dropdown, and the text 'Amusement Parks'. Below these rows are two buttons: '+ ADD A NEW LINE' and 'CLEAR'. To the right of the search criteria, there are three filter dropdowns: 'Material Type' set to 'Articles', 'Language' set to 'English', and 'Publication Date' set to 'Any year'. At the bottom, a green arrow points to the constructed search string: 'Title contains (Donal Duck) OR (Mickey Mouse) NOT Subject is (exact) Amusement Parks'. To the right of this string is a green magnifying glass icon and the word 'SEARCH'.

Advanced Search Example with Operators

ExLibris Primo Library Search | Tags | A-Z | Help | Language: English▼

By title ▼ bankruptcy

Browse Simple Search

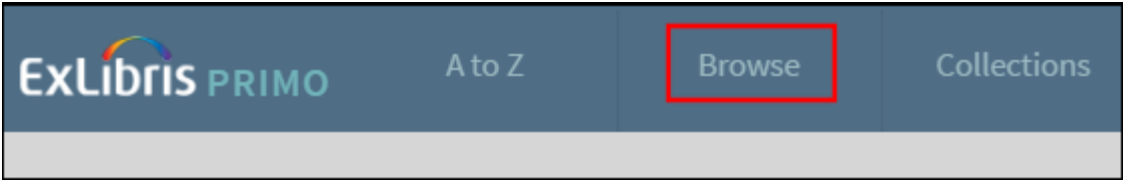
prefix "bankruptcy" in titles list [← Previous](#) [Next →](#)

Number of records	Entry
5	Bankruptcy
1	Bankruptcy Abuse Prevention and Consumer Protection Act of 2001
2	Bankruptcy Abuse Prevention and Consumer Protection Act of 2005
1	Bankruptcy act and rules
1	Bankruptcy and arrangement proceedings: April 1956
1	Bankruptcy law and practice

prefix "bankruptcy" in titles list 123 [← Previous](#) [Next →](#)

Example Browse Results by Title

To access Browse, click the **Browse** link at the top of the page, as shown below.



Browse Search Link



Your Space in Primo

This section contains topics associated with your personal space and settings in Primo.

Why Should I Sign In?

When you sign into Primo, you are able to do the following:

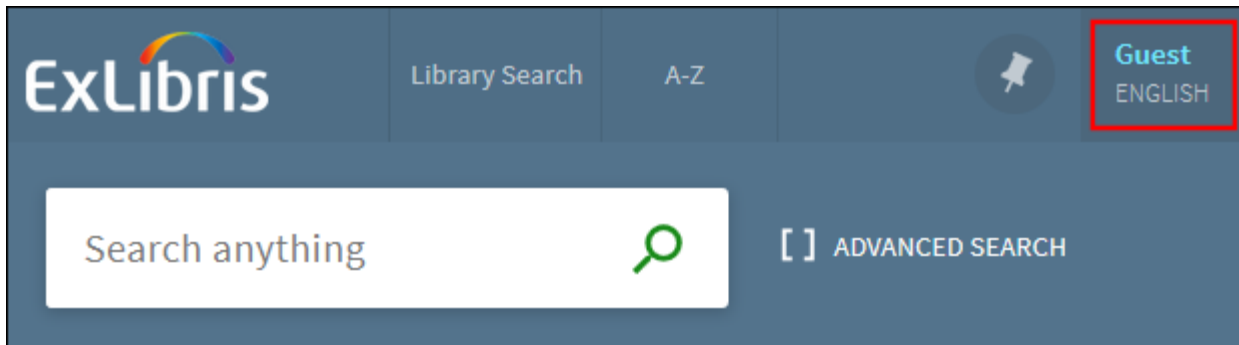
- **Set preferences for your current and future sessions.** You can set your preferences so that they reflect the way you usually search, and save them for future sessions.
 - **Add items you found permanently to your Favorites.** You can save items for future use.
 - **Access external licensed resources.** The institution offers licensed information resources to its users. Once you sign in, you can search and retrieve items from these additional resources.
 - **Use library services.** You can benefit from library services such as requesting or recalling items.
-

Why Should I Sign Out?

You should sign out of Primo so that your searches remain private and your personal settings and favorites are not tampered with by anyone else.

My Library Card

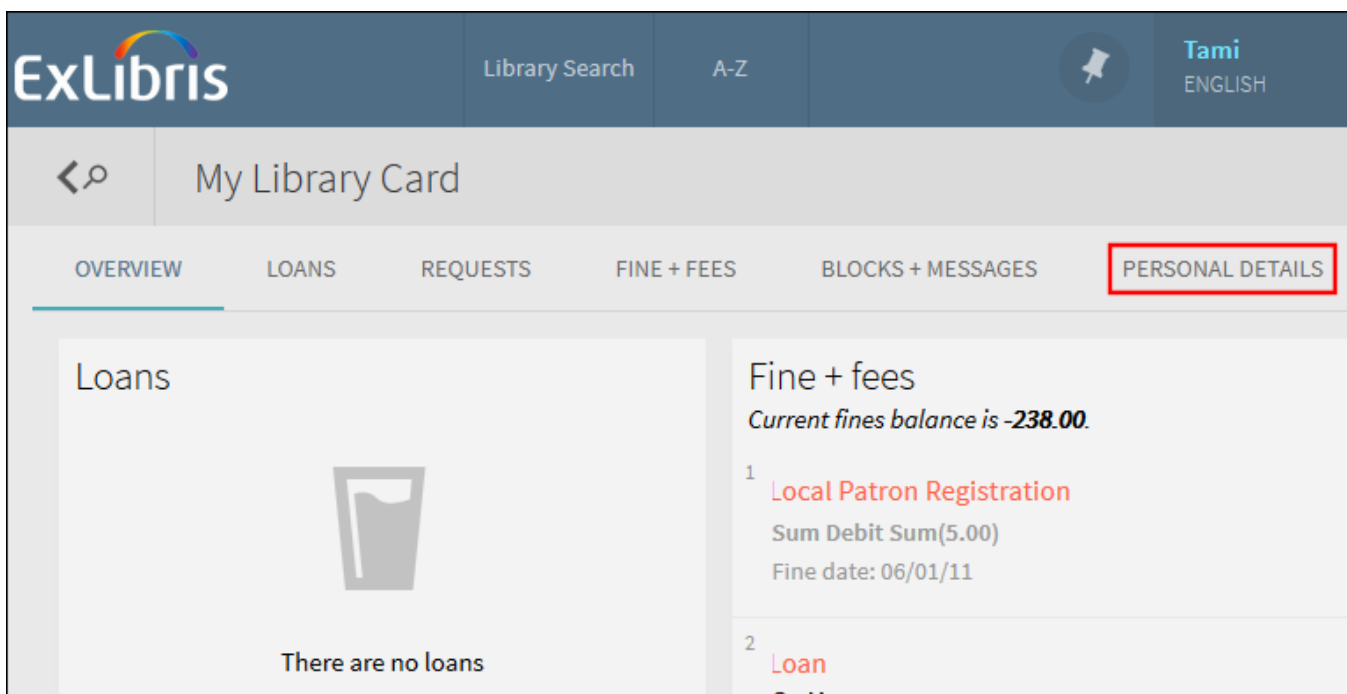
My Library Card enables you to view the contents of your library card and perform library services, such as renewing a book or canceling a request. In addition, it lets you define your personal Primo settings. To access My Library Card, place your cursor over the **Sign-In** area at the top of any page to display the **My Library Card** link.



My Library Card Link

Personal Settings


You can tailor the Primo user interface so that it reflects the way you usually search. For example, you can specify the default language, the maximum numbers of search results per page, your default e-mail address, and your cell phone number. To set your preferences, click the **Personal Details** tab on the My Library Card page.





Personal Details Tab

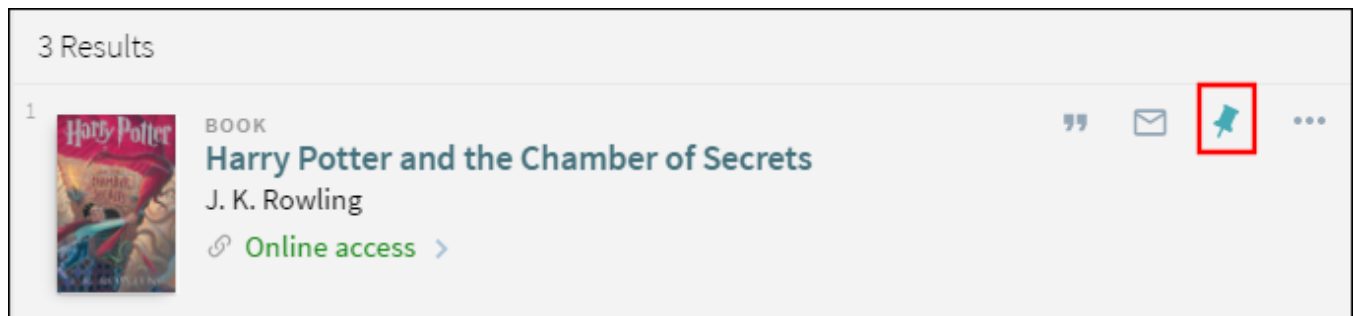
NOTE: To keep your settings for future sessions, you must sign in and save your preferences.

Using My Favorites

The My Favorites page allows you to save items that you find during your Primo session. To access My Favorites, click the Pin icon  at the top of the page.

Saving Items to My Favorites

When you click the **Unpinned** icon  for an item in the search results, the system highlights the item, changes the icon to the **Pinned** icon , and adds the item to the My Favorites page.




NOTE: You must sign in to save items for future sessions.

Removing Items from My Favorites


To remove an item from the My Favorites page, click the **Pinned** icon  next to the item in the search results or the My Favorites page.

3 Results

1  **BOOK**
Harry Potter and the Chamber of Secrets
 J. K. Rowling
[Online access >](#)

Icons: Quote, Email, **Pin** (highlighted with a red box), More options

Viewing Items Saved in My Favorites

To view items that you have saved on the My Favorites page, click the Pin icon  at the top of each page. From the list of items, click the item that you want to display.

harry potter ✕ / Local Search ▼ / Primo Local Repository ▼ 

3 Results

1  **BOOK**
Harry Potter and the Chamber of Secrets
 J. K. Rowling
[Online access >](#)

Icons: Quote, Email, **Pin** (highlighted with a red box), More options

2  **BOOK**
Ha-ru'e Phod-thar dañ gsañ ba'i khañ pa
 J. K. Rowling
 Available at [WSU Main Library Main Collection \(PZ90.T58 R79835 Har 2009 \) >](#)

Icons: Quote, Email, **Pin**, More options

My Favorites Page

Using the Brief Results

The Brief results display all the items that match your search query. For each item, the following information displays:

- Resource Type – the format of the item, such as book, article, journal, and so forth.
- Title – Click the title to display more information and services for the item (see [Brief Results Sections](#)).
- Author, creator, and date – the item's author, creator, and publication date
- Availability status – Click this link to display more information and services (such as requesting or viewing the item).
- Send to actions – The Send To actions allow you to perform actions on the item (such as emailing the item, creating a citation for the item, and so forth).
- Facets – The facets on the right side of the page allow you to filter your results by categories (such resource type and date) and to specify a type of sort.

harry potter

X

Local Search


Primo Local Repository

🔍

[] ADVANCED SEARCH

3 Results

1




BOOK

Ha-ru'e Phod-thar dañ gsañ ba'i khañ pa

J. K. Rowling

Available at [WSU Main Library Main Collection \(PZ90.T58 R79835 Har 2009\)](#)

2




BOOK

Hari Poṭer ya-ḥadar ha-sodot

/ רולינג, ג'י. קי ; J. K. Rowling

Available at [WSU Main Library Main Collection \(PZ40.R685 H36 2001\)](#)

3



BOOK

Harry Potter and the Chamber of Secrets

J. K. Rowling

[Online access](#)

Active filters

List of Versions X

Reset filters

Tweak my results

Sort by Date-newest

Availability

Available in the Library (3)

Full Text Online (1)

Subject

Hogwarts School of Wit... (3)

Potter, Harry (Fictitious... (3)

Magic (3)

Brief Results

Brief Results Sections

If you would like to see more information on an item, you can click either the title or the availability status link to display the following information, which is organized by section:

- **View Online** – This section allows you to display an item that is available for online viewing.
- **Get It** – This section allows you to request physical items (such as books and audio CDs) from your institution. Depending on your institution, you may be able to request these items directly from Primo. Otherwise, this tab will link you to your institution to perform requests.

NOTE: You may have to sign in to Primo or your institution to make a request.

- **Location Items** – This section lists all of the locations that hold this item. To get more information on a location, click the location's link.
- **Details** – This section displays the item's full record, which includes details (such as the publisher and creation date).

6/28

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21

- **Links** – This section displays additional links, which may allow you to view cover art, the Table of Contents, and so forth.
- **More** – This section displays links to full text services for journals, such as provided by the SFX link resolver.