



# End User Guide (New UI)

August 2016 - DRAFT

Ex Libris Confidential

## CONFIDENTIAL INFORMATION

The information herein is the property of Ex Libris Ltd. or its affiliates and any misuse or abuse will result in economic loss. DO NOT COPY UNLESS YOU HAVE BEEN GIVEN SPECIFIC WRITTEN AUTHORIZATION FROM EX LIBRIS LTD.

This document is provided for limited and restricted purposes in accordance with a binding contract with Ex Libris Ltd. or an affiliate. The information herein includes trade secrets and is confidential.

## DISCLAIMER

The information in this document will be subject to periodic change and updating. Please confirm that you have the most current documentation. There are no warranties of any kind, express or implied, provided in this documentation, other than those expressly agreed upon in the applicable Ex Libris contract. This information is provided AS IS. Unless otherwise agreed, Ex Libris shall not be liable for any damages for use of this document, including, without limitation, consequential, punitive, indirect or direct damages.

Any references in this document to third-party material (including third-party Web sites) are provided for convenience only and do not in any manner serve as an endorsement of that third-party material or those Web sites. The third-party materials are not part of the materials for this Ex Libris product and Ex Libris has no liability for such materials.

## TRADEMARKS

"Ex Libris," the Ex Libris bridge, Primo, Aleph, Alephino, Voyager, SFX, MetaLib, Verde, DigiTool, Preservation, Rosetta, URM, ENCompass, Endeavor eZConnect, WebVoyage, Citation Server, LinkFinder and LinkFinder Plus, and other marks are trademarks or registered trademarks of Ex Libris Ltd. or its affiliates.

The absence of a name or logo in this list does not constitute a waiver of any and all intellectual property rights that Ex Libris Ltd. or its affiliates have established in any of its products, features, or service names or logos.

Trademarks of various third-party products, which may include the following, are referenced in this documentation. Ex Libris does not claim any rights in these trademarks. Use of these marks does not imply endorsement by Ex Libris of these third-party products, or endorsement by these third parties of Ex Libris products.

Oracle is a registered trademark of Oracle Corporation.

UNIX is a registered trademark in the United States and other countries, licensed exclusively through X/Open Company Ltd.

Microsoft, the Microsoft logo, MS, MS-DOS, Microsoft PowerPoint, Visual Basic, Visual C++, Win32,

Microsoft Windows, the Windows logo, Microsoft Notepad, Microsoft Windows Explorer, Microsoft Internet Explorer, and Windows NT are registered trademarks and ActiveX is a trademark of the Microsoft Corporation in the United States and/or other countries.

Unicode and the Unicode logo are registered trademarks of Unicode, Inc.

Google is a registered trademark of Google Inc.

iPhone is a registered trademark of Apple Inc.

Copyright Ex Libris Limited, 2016. All rights reserved.

Document released: June 28, 2016

Web address: <http://www.exlibrisgroup.com>

## 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. On the left, a white search box contains the text "global warming" in quotation marks. To the right of the search box is a small 'x' icon and a magnifying glass icon. Further right, there is a button with the text "[ ] ADVANCED SEARCH".

---

## Searching for Any Specified Words or Phrases

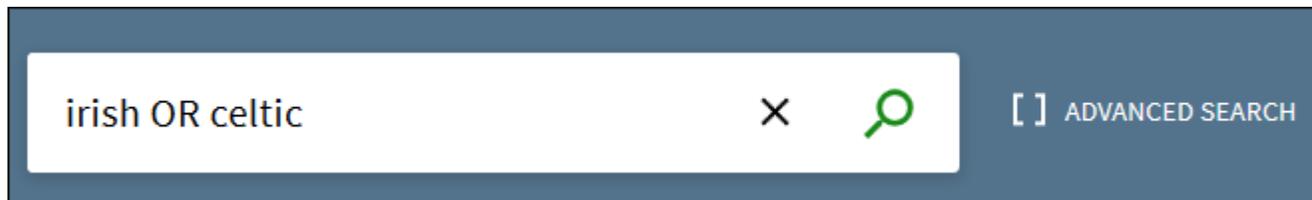
You can search for items that contain at least one of the words or phrases you type in the Search box. To do so, type **OR** between the words or phrases.

---

**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 search bar with a white input field containing the text "irish OR celtic". To the right of the input field is a white "X" icon for clearing the search, followed by a green magnifying glass icon for searching. Further right is a link labeled "[ ] ADVANCED SEARCH".

---

**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

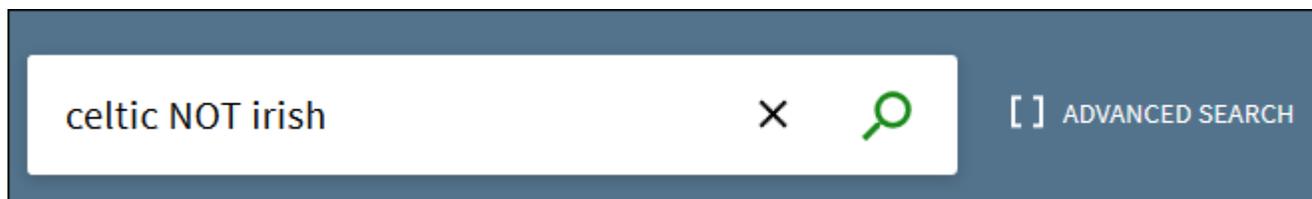
You can exclude items that contain specific words or phrases. To do so, type **NOT** and then type the word or phrase to exclude.

---

**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. It features a dark blue search bar with a white input field containing the text "celtic NOT irish". To the right of the input field is a white "X" icon for clearing the search, followed by a green magnifying glass icon for searching. Further right is a link labeled "[ ] ADVANCED SEARCH".

---

**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**:



Shakespeare AND (tragedy OR sonnet) X  [ ] 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:



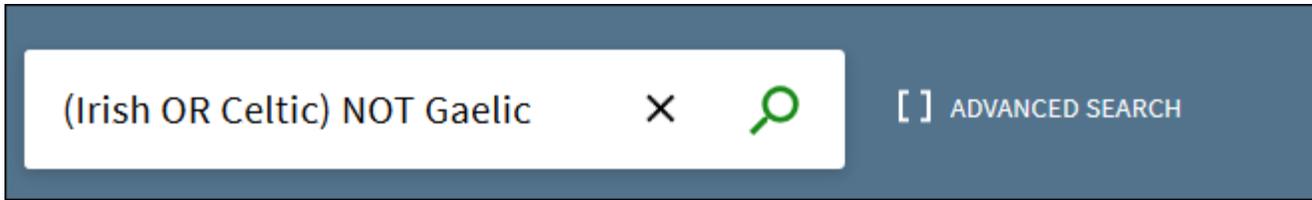
(Shakespeare AND tragedy) OR sonnet X  [ ] ADVANCED SEARCH

---

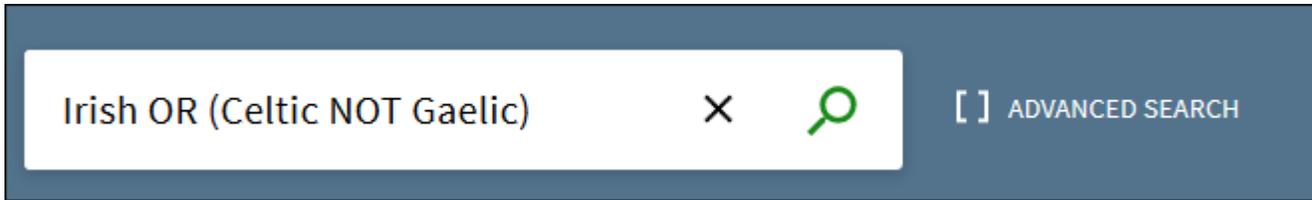
**NOTE:** After the results are returned, Primo will display the altered query in the search box so that you can decide whether to modify and re-execute your query to get expected results.

---

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

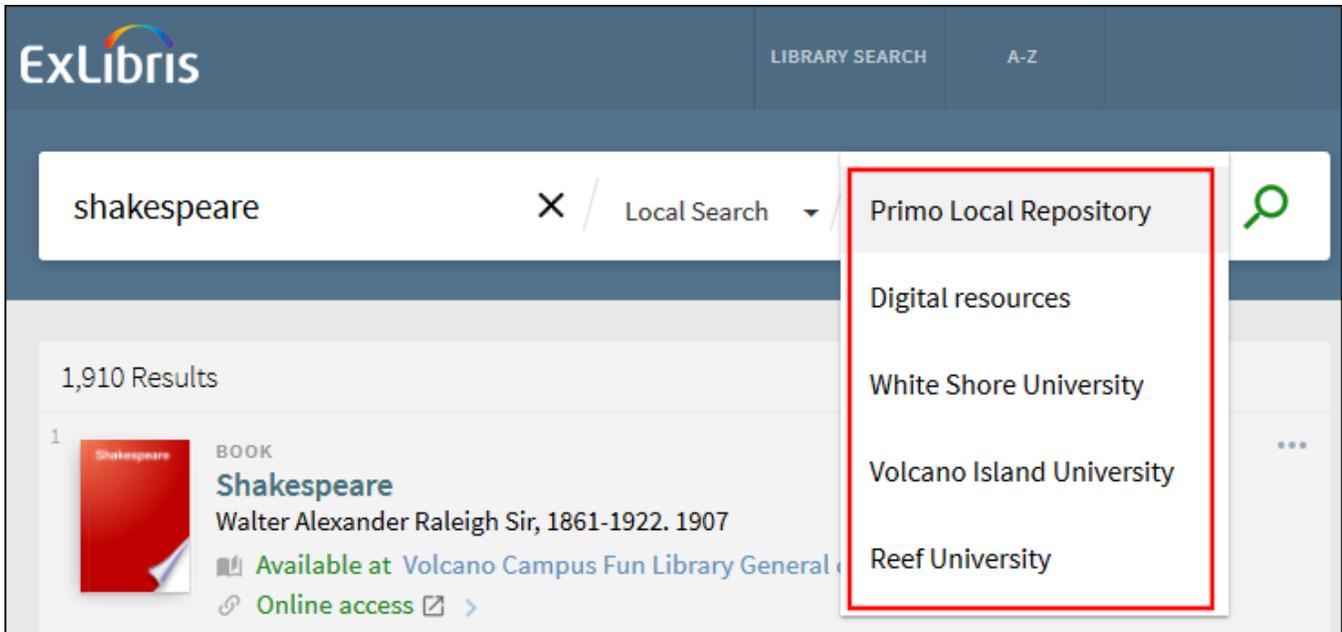


If no parentheses are specified in the above query, Primo will apply the precedence rules and instead group the words **Celtic** and **Gaelic** as follows:



## 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.



---

## 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 shows the Primo Central search interface. At the top, the search term "stress test" is entered in a search bar. To the right of the search bar are dropdown menus for "Primo Central" and "PC", a search icon, and a link to "ADVANCED SEARCH". Below the search bar, it indicates "565 Results". On the right side, there is a "Tweak my results" section with a red-bordered box around the "Expand My Results" checkbox, which is currently unchecked. Below this, there is a "Sort by" dropdown menu set to "Relevance". The main search results area shows a list of results, with the first result being an article titled "Science in Japan - Stress test" from "The economist, 2014, Vol.412(8899), pp.61-60". The article is from "Swetswise Online Content (Swets Information Services BV) ISSN: 0013-0613".

## 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.

### 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 with the following elements:

- Search for:** Local Search (selected), Remote Search, Primo Central
- Search Scope:** Primo Local Repository
- Operator:** SIMPLE SEARCH
- Search Criteria:**
  - Title contains (Donal Duck) OR (Mickey Mouse)
  - NOT Subject is (exact) Amusement Parks
- Filters:**
  - Material Type: Articles
  - Language: English
  - Publication Date: Any year
- Actions:** + ADD A NEW LINE, CLEAR
- Preview:** → Title contains (Donal Duck) OR (Mickey Mouse) NOT Subject is (exact) Amusement Parks
- Search Button:** 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.

### 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.

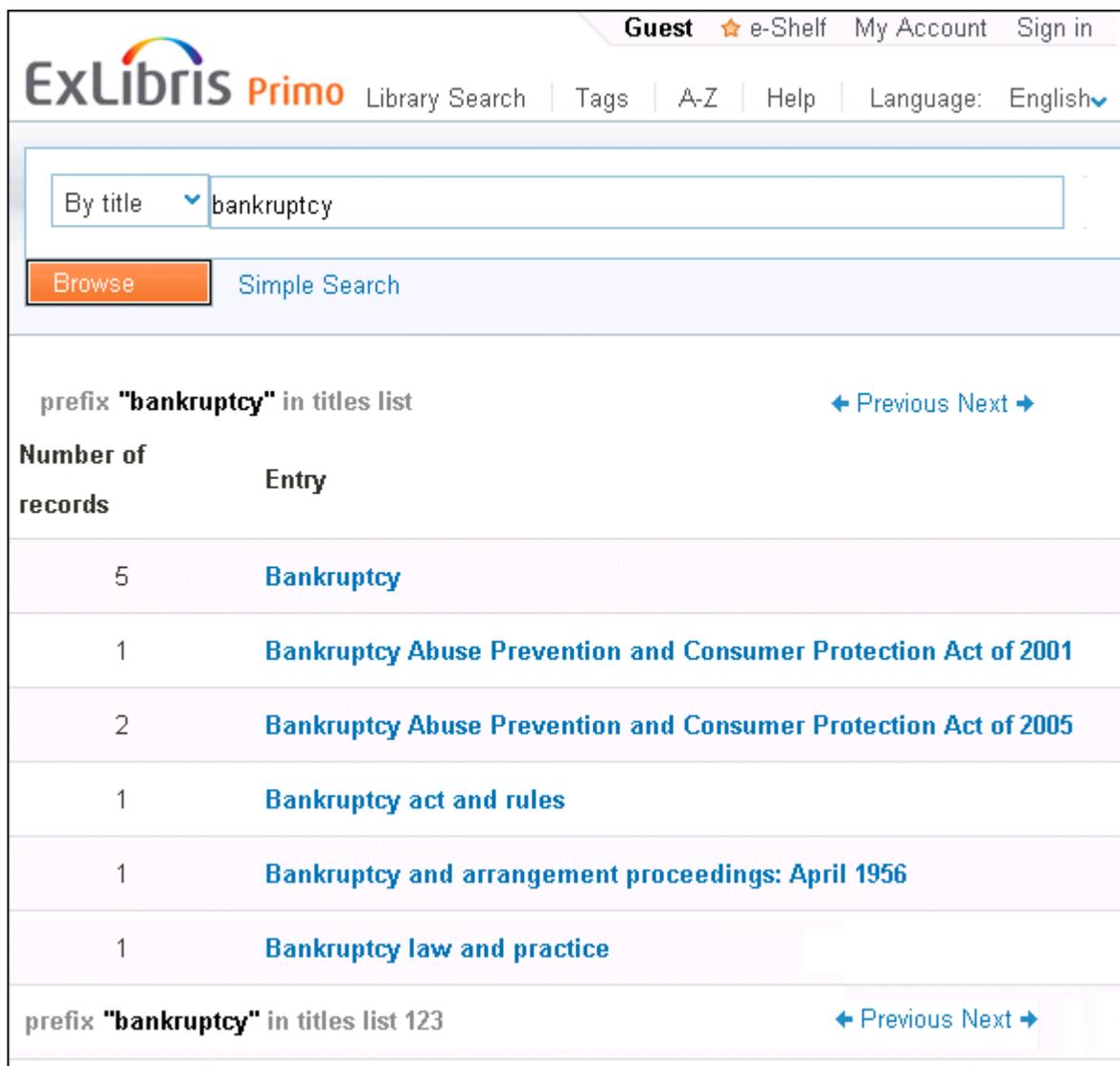
The screenshot shows an advanced search interface with the following elements:

- Search for:** Local Search (selected), Remote Search, Primo Central
- Search Scope:** Primo Local Repository
- Operator:** SIMPLE SEARCH
- Search Criteria:**
  - Title contains (Donal Duck) OR (Mickey Mouse)
  - NOT Subject is (exact) Amusement Parks
- Filters:**
  - Material Type: Articles
  - Language: English
  - Publication Date: Any year
- Actions:** + ADD A NEW LINE, CLEAR
- Preview:** → Title contains (Donal Duck) OR (Mickey Mouse) NOT Subject is (exact) Amusement Parks
- Search Button:** SEARCH

### Advanced Search Example with Operators

## Using Browse

The Browse search allows you to browse library material (local material only) in order to find information of relevance quickly. You can browse material by author, title, and subject. In the results, you can click an underlined entry to see its associated records. It is also possible to browse by call number, which returns a list of associated records in brief format. Clicking a title displays its full record.

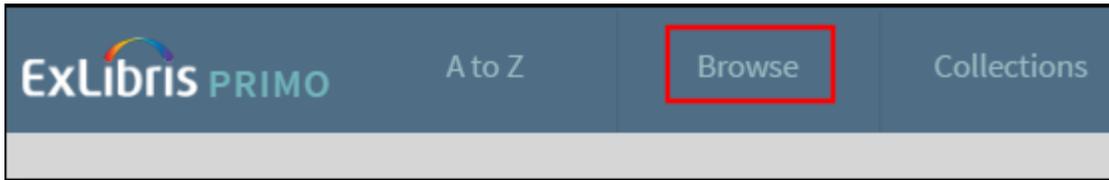


The screenshot shows the ExLibris Primo search interface. At the top, there are navigation links for 'Guest', 'e-Shelf', 'My Account', and 'Sign in'. Below this is the 'ExLibris Primo' logo and a search bar containing 'bankruptcy'. A 'Browse' button is highlighted in orange. Below the search bar, there are navigation options: 'Library Search', 'Tags', 'A-Z', 'Help', and 'Language: English'. The main content area shows the search results for 'bankruptcy' in the titles list. The results are displayed in a table with two columns: 'Number of records' and 'Entry'. The first entry is 'Bankruptcy' with 5 records. Other entries include 'Bankruptcy Abuse Prevention and Consumer Protection Act of 2001', 'Bankruptcy Abuse Prevention and Consumer Protection Act of 2005', 'Bankruptcy act and rules', 'Bankruptcy and arrangement proceedings: April 1956', and 'Bankruptcy law and practice'. Navigation arrows are visible at the top and bottom of the results list.

Number of records	Entry
5	<a href="#">Bankruptcy</a>
1	<a href="#">Bankruptcy Abuse Prevention and Consumer Protection Act of 2001</a>
2	<a href="#">Bankruptcy Abuse Prevention and Consumer Protection Act of 2005</a>
1	<a href="#">Bankruptcy act and rules</a>
1	<a href="#">Bankruptcy and arrangement proceedings: April 1956</a>
1	<a href="#">Bankruptcy law and practice</a>

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.
- 

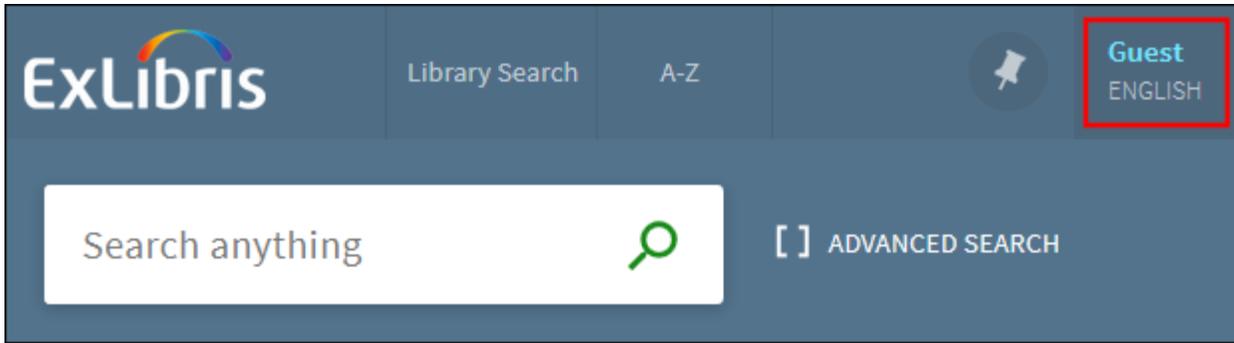
### Why Should I Sign Out?

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.

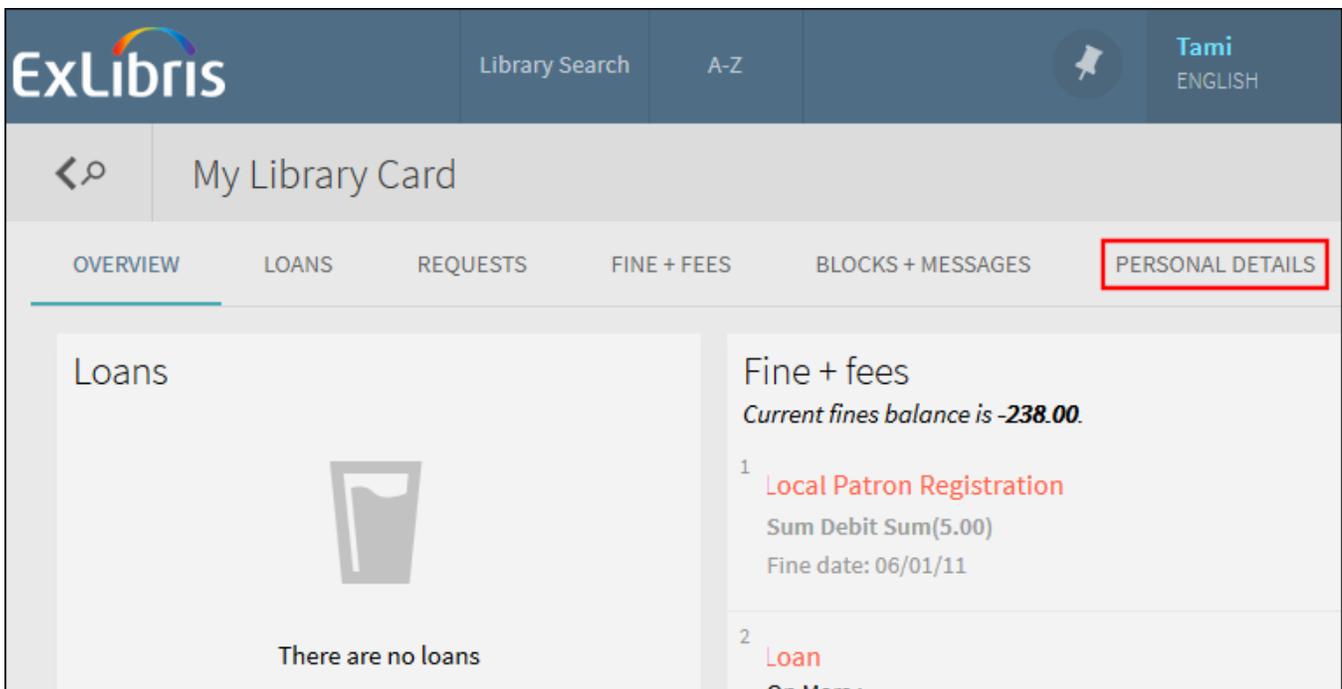


### My Library Card Link

---

## 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 >](#)

” ✉  ⋮

## 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 >](#)

” ✉  ⋮

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

” ✉  ⋮

### 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 Local Search Primo Local Repository ADVANCED SEARCH

3 Results

- 

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

BOOK  
**הארי פוטר וחדר הסודות / Hari Poṭer ṽa-ḥadar ha-sodot**  
ר.רולינג, ג'י. קי ; J. K. Rowling  
Available at [WSU Main Library Main Collection \(PZ40.R685 H36 2001\)](#) >
- 

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).

- **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.