




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

## Primo User Experience

Jean Cabaup | Training Consultant  
Mike Pruzan | Senior Knowledge Management Specialist

**ExLibris**  
a ProQuest Company



## Poll

- How many of you are using the new UX?
- How many of you are considering using the new UX?

© 2017 Ex Libris | Confidential & Proprietary

**ExLibris**



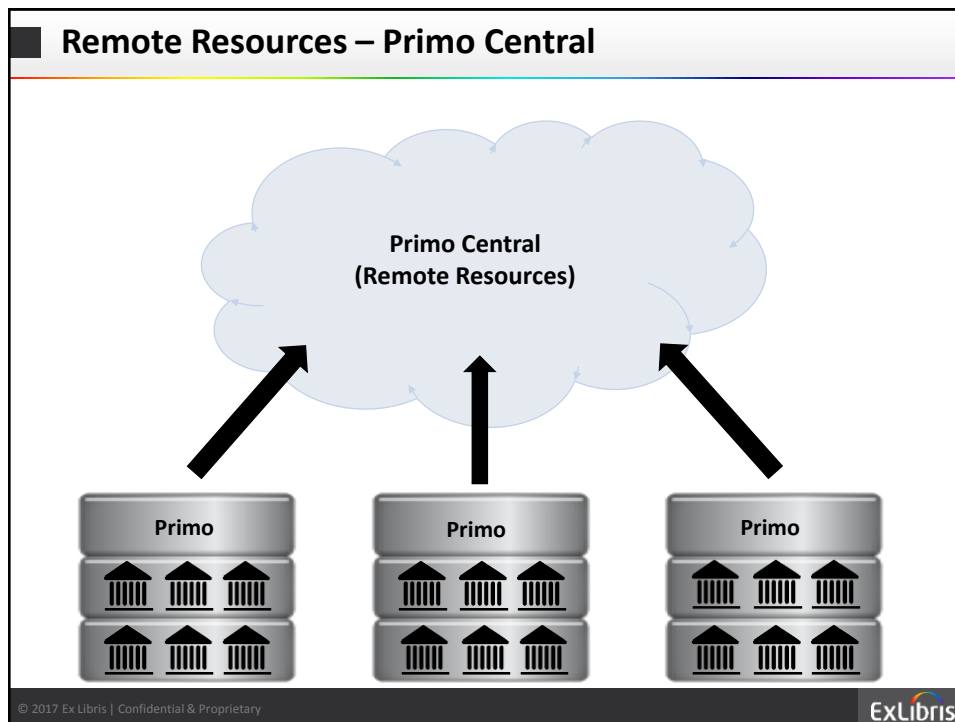
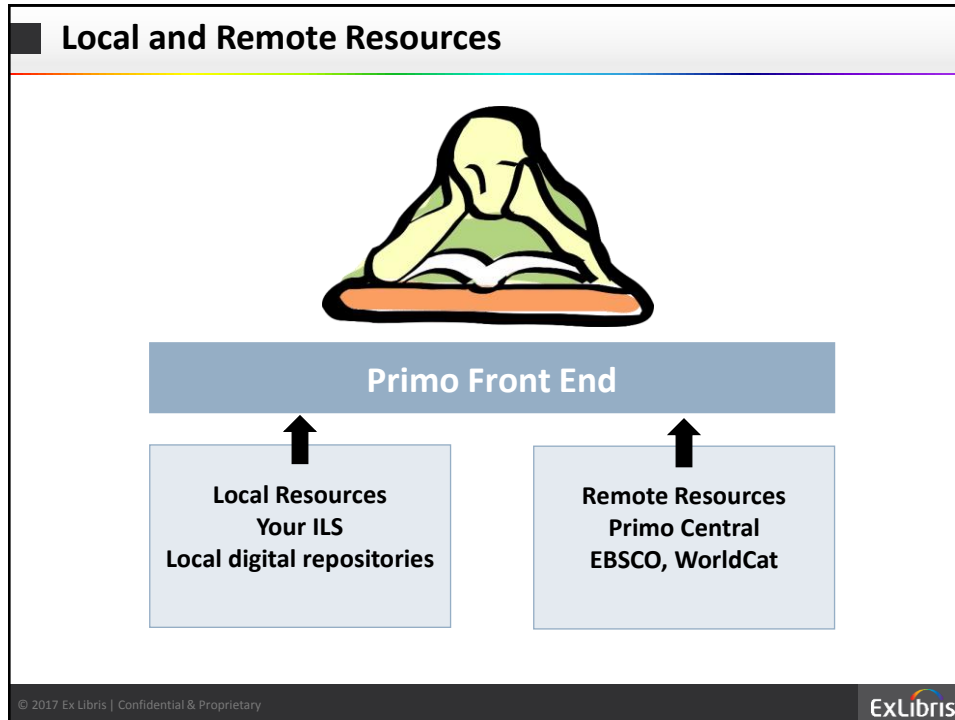
## Agenda

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



## Agenda

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



## 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

My Profile > Edit Client Resources

Customer name: PStraining Enrollment date: 02/17/2011 06:27 AM

**Resource Collections Activation** [Learn More](#)

Please select resources from the following list and click Done to activate them.

Filter By:  Search:  [Upload resource activations from Metal](#) [Export active resources](#)

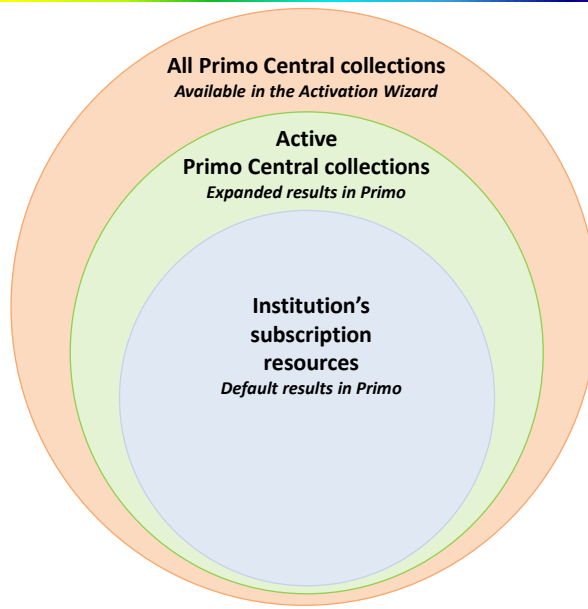
Provider Name	Resource Name	Requires Subscription for	Added On	
ABC-CLIO	<input checked="" type="checkbox"/> Resource Name	Requires Subscription for	Added On	
	<input checked="" type="checkbox"/> The ABC-CLIO eBook Collection	Delivery	07/06/2011	<a href="#">Show Info</a>
ACM Digital Library	<input checked="" type="checkbox"/> Resource Name	Requires Subscription for	Added On	
	<input checked="" type="checkbox"/> ACM Digital Library	Delivery	04/06/2011	<a href="#">Show Info</a>
ARTstor, Inc.	<input type="checkbox"/> Resource Name	Requires Subscription for	Added On	
	<input type="checkbox"/> The ARTstor Digital Library	Search, Delivery	04/11/2013	<a href="#">Show Info</a>
ASTM International	<input checked="" type="checkbox"/> Resource Name	Requires Subscription for	Added On	
	<input checked="" type="checkbox"/> ASTM International - Books & STPs	Delivery	02/07/2013	<a href="#">Show Info</a>
	<input checked="" type="checkbox"/> ASTM Standards	Delivery	03/07/2013	<a href="#">Show Info</a>
Accessible Archives	<input checked="" type="checkbox"/> Resource Name	Requires Subscription for	Added On	
	<input checked="" type="checkbox"/> Accessible Archives	Delivery	04/11/2013	<a href="#">Show Info</a>

[Reset](#) [Done](#)

© 2017 Ex Libris | Confidential &amp; Proprietary

ExLibris

## Primo Central – Primo Central Collections



© 2017 Ex Libris | Confidential &amp; Proprietary

ExLibris

## Primo Central – Alternate Coverage

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

© 2017 Ex Libris | Confidential &amp; Proprietary

ExLibris

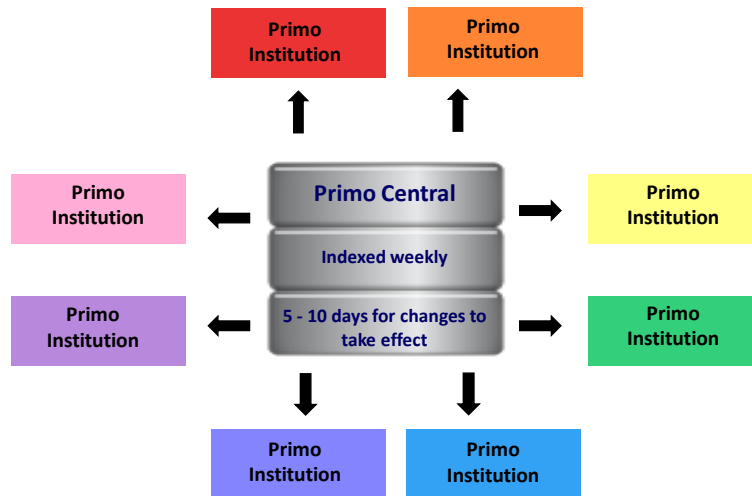
## Primo Central – Institutional Holdings File

Primo Central Collection: Gale OneFile	Institutional holdings file	Full text available?
0894-8763 - Journal of Applied Meteorology	n/a	No full text
1362-5072 - Journal of Applied Microbiology	1362-5072 - Journal of Applied Microbiology	Full text available
0264-3758 - Journal of Applied Philosophy	n/a	No full text
0021-8979 - Journal of Applied Physics	n/a	No full text
0021-9010 - Journal of Applied Psychology	0021-9010 - Journal of Applied Psychology	Full text available
1537-064X - Journal of Applied Research	1537-064X - Journal of Applied Research	Full text available
0021-9037 - Journal of Applied Spectroscopy	n/a	No full text

© 2017 Ex Libris | Confidential &amp; Proprietary

ExLibris

## Primo Central – Updates



© 2017 Ex Libris | Confidential & Proprietary

ExLibris



## Agenda

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

© 2017 Ex Libris | Confidential & Proprietary

ExLibris

## 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

© 2017 Ex Libris | Confidential & Proprietary

ExLibris

## 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

© 2017 Ex Libris | Confidential & Proprietary

ExLibris



## 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

© 2017 Ex Libris | Confidential & Proprietary

ExLibris

## 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

© 2017 Ex Libris | Confidential & Proprietary

ExLibris

## 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)

© 2017 Ex Libris | Confidential & Proprietary

ExLibris

## 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

© 2017 Ex Libris | Confidential & Proprietary

ExLibris

## 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

© 2017 Ex Libris | Confidential & Proprietary

ExLibris

## 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*

© 2017 Ex Libris | Confidential & Proprietary

ExLibris

## Sample searches

### Basic search

- Search in different scopes and tabs to see results
- Examples
  - Keyword search (default) - *global economy*
  - Spelling correction (Did You Mean) - *libary*
  - 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