New Primo User Interface

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Frequently Asked Questions

Primo is about the users, and as such, it will provide a new user experience with the August 2016 release. Its design is based on user studies and feedback to address the different needs of different types of users. With the May 2016 release, you will have the opportunity to preview how your data appears in the new Primo UI before its general release in August.

In this document, we will answer questions from the community and provide clear direction of upcoming improvements to the new Primo UI. As questions arise, we will continually update this list.

Release Plan

1. **Can we start customizing the new Primo interface with the Primo May 2016 release?**

   Customers can start exploring the new UI starting with the Primo May 2016 release. This release includes the new UI Customization Package manager, which allows you to customize the new Primo interface by specifying limited overrides to the out-of-the-box CSS, HTML, and images.

2. **Can Total Care (TC) customers preview the new interface?**

   Yes. Beginning with the Primo February release, TC customers can preview the new Primo UI by specifying the following URL in their browsers:

   `https://<server:port>/primo-explore/search?vid=<your_view>`

3. **Does our Primo URL have to change, or can we keep our existing URL?**

   The new Primo UI uses a different path and parameters for the URL. Your URL will have to change unless you use a proxy that redirects to the new URL.

4. **Will TC customers be able to upgrade in the Primo August 2016 release?** (Previously, upgrades for TC customers have usually occurred a few weeks after the non-TC customers)

   Yes. The upgrade for TC customers will be available at the beginning of August, but they can decide on when to expose new Primo UI to their end users.

   There is no difference between TC customers and everyone else. All customers can decide when to switch to the new UI.

5. **Will customers be forced use the new Primo UI by a specific date?**

   No. Customers can decide when to expose the new Primo UI to their end users.
   Because the new Primo UI can be implemented in parallel with the classic UI, you can test the new Primo UI in parallel with the classic UI and decide when to expose it to the end users. The classic Primo UI will continue to be supported with no planned end date.

Customization

1. **Where can we find the new UI Customization Package manager?**

   The package manager can be found in the Back Office under **Primo Home > Primo Utilities > UI Customization Package Manager**. For more information, see the following sections:

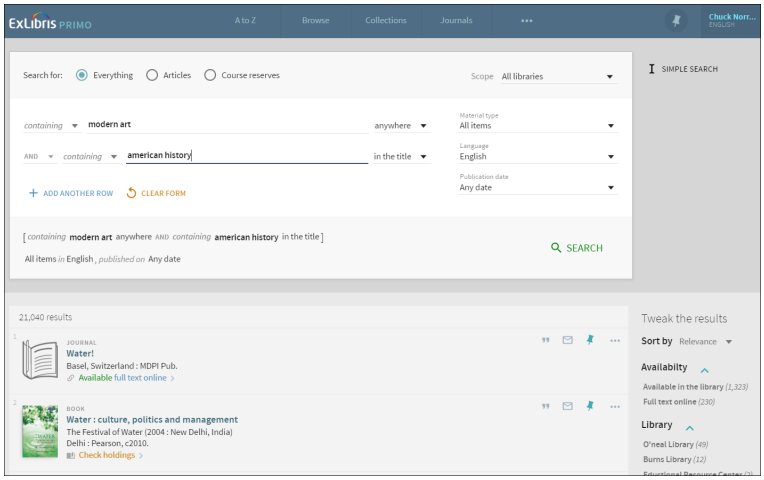
- New UI Customization
- The UI Customization Package Manager

2. **Instead of a drop-down menu, will there be an option to display search scopes as tabs above the search box?**

   No. The drop-down menu is the only option, but we are considering ways to make it more visible.

3. **Will an Advanced Search option be provided with the new Primo UI?**

   Yes. The Advanced search functionality will be included with the Primo August 2016 release:



Advanced Search Page

4. **Will the records in the search results contain any tabs?**

   No. Based on user feedback, our new design concept will provide cleaner results that gradually expose end users to more information as needed. End user will no longer have to access multiple tabs to locate needed information.

5. **Will we be able to configure the number of search result that appear on a page?**

   No. The new interface includes both infinite load (which allows users to load 10 additional results to the page at a time) and pagination. We will continue to track usage and performance to determine whether changes should be made to the number of results that are loaded at a time.

6. **Will there still be the option to put the facets on the left side?**

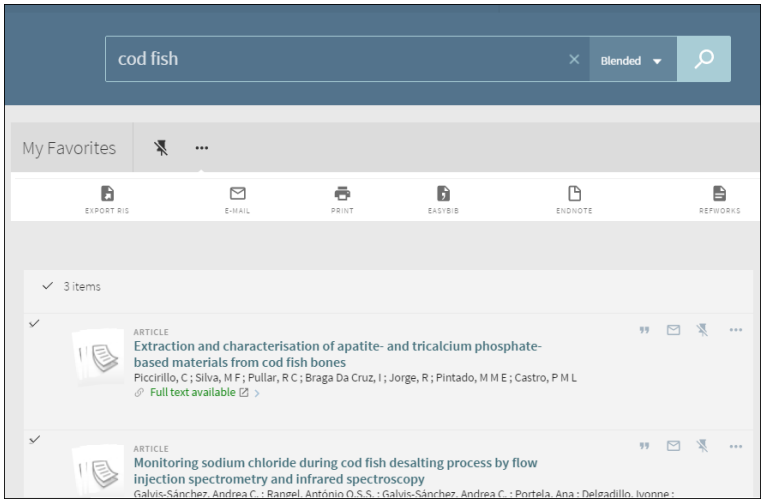
   Yes. This can be done through configuration in the Views Wizard. Because our usability tests showed that the "facets on the right" option performed better, Ex libris recommends that you allow your users an opportunity to try the default option before switching the facets to the left.

7. **Why we can't choose multiple facets?**

   We found the multiple facet selection was not used by the users and that by adding this functionality may make the new interfaces confusing and cumbersome to them. After users begin to use and become familiar with the new interface, we may reconsider this functionality.

8. **On the E-shelf, can we execute actions on some or all of the items such as sort and send?**

   Yes, actions on bulk are available from the new Favorites page:



Favorites Page

9. **Are you planning on including tags and reviews functionality?**

   We are still considering what should be the best approach to include tags. This is planned for the beginning of 2017.

10. **Are you planning on including additional citation formats with the general release in August?**

    No, but Harvard1 will be added during 2017.

Migration to the New UI

1. **Will existing permalinks work after the switch to the new UI?**

   Yes. With the November release, `dlSearch` and `dlDisplay` permalinks will be redirected to the new UI if the new **Switch to new UI** parameter has been set in the Back Office (**Primo Home > Ongoing Configuration Wizards > Institution Wizard**).

2. **Will the users' e-Shelf data be transferred to the new UI?**

   Yes. Folders from the e-Shelf will be converted to labels in the new UI.

3. **Will the users' saved searches be transferred to the new UI?**

   Yes. They will be available with the Primo February 2018 release.

4. **Should we expect any issues accessing the new UI if we are using a host name on our domain?**

   No, but you must open a case to create an SSL certificate for your host name.

5. **Does the switch to the new UI require SSL?**

   Yes. For more information, see Checklist for using https:// in Primo New UI.

6. **Will users have access to both the new and classic Primo UIs?**

   Yes. With the February 2018 release, you will have the option to display a link to access the new UI from the classic UI. Users will have this option until you decide to disable the classic UI. For more information, see Primo February 2018 Highlights.

Accessibility

1. **Does the new UI take accessibility into consideration?**

   Yes. Currently, we are developing and testing accessibility features for the August release that comply with section 508 and WCAG 2.0 AA standards.

Browser and Device Support

The new Primo User Interface supports all the leading browsers: Chrome, Firefox, Safari, and Internet Explorer. There is an ongoing process of monitoring new browser versions and checking their compatibility with Primo. Full browser support details are listed below.

Browser Certification

Ex Libris' browser certification is based on industry usage statistics (W3C).

The following table describes the certified browsers:

Browser	Description
Apple® Safari®	The new Primo UI is tested and certified with the most recent stable version of Safari® on Mac®.
Google Chrome™	The new Primo UI is tested and certified with the most recent stable version of Google Chrome.
Mozilla® Firefox®	The new Primo UI is tested and certified with the most recent stable version of Firefox®
Microsoft® Internet Explorer®	The new UI is tested and certified with the two most recent browser versions for Microsoft® Internet Explorer®: EDGE and IE 11. **Note** IE 11 has general known performance issues with supporting material design components. We are working to optimize the performance and behavior of IE 11.

Mobile Device Certification

- The new Primo user interface has a responsive design that allows it to support any screen size and resolution. As part of our certification process, we test it with the following mobile devices: IPhone 6 (iOS 9) and Samsung 6 (Android Marshmallow).
- There is a known bug that will be fixed in November for Chrome with IOS.

Other Requirements

For all browsers, you must enable JavaScript, and SSL 3.0.

Frequently Asked Questions for Newspaper Search

A dedicated news scoped search box and landing page in the new Primo UI enables patrons to easily search, find, and access news items. This new feature increases the ability to discover content from newspapers, magazines, and other news resources. With the new feature enabled news items will be removed from the standard Primo Central search results, increasing its focus on scholarly content. Activation and configuration of the new feature is performed through the Primo Back Office.

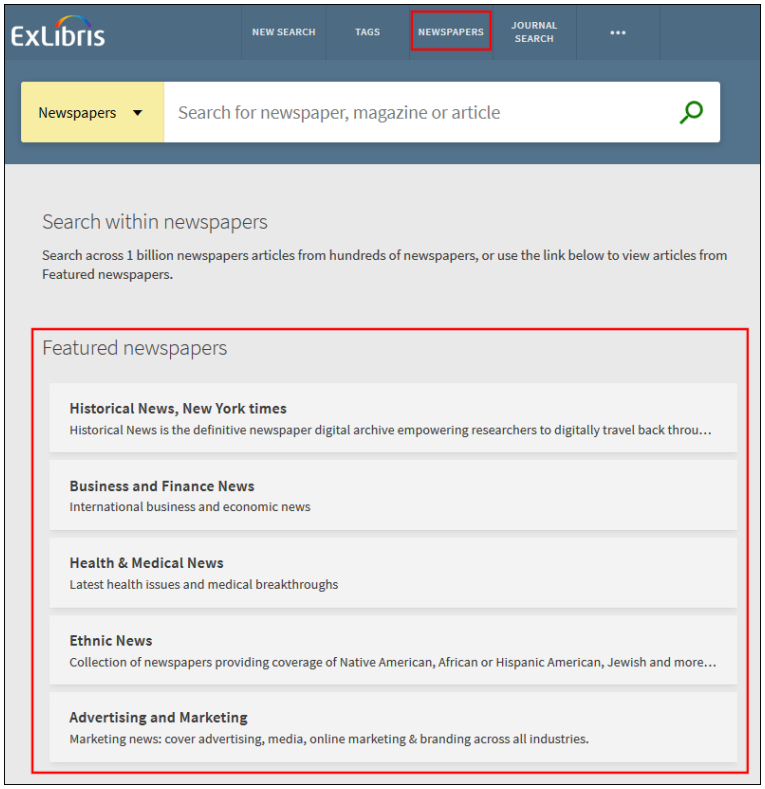
1. **What is Newspaper Search?**

   Newspaper Search is a separate search interface in Primo that returns results exclusively for newspaper articles, magazine articles, and news items. This meets end user expectations, which prefer not to mix newspaper articles with other scholarly content and to display these results separately. Newspaper Search will also provide access to many new newspaper collections that were not previously offered through Primo Central. With the addition of Newspaper Search, centrally-indexed newspaper content will not display in regular searches that include the Primo Central index.

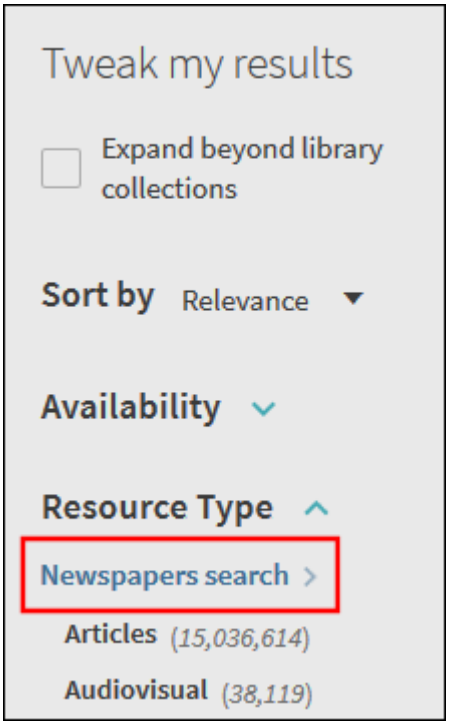
   To allow users to access the centrally-indexed newspaper content, Primo provides the following options:

   - The search box on the new Newspaper Search page allows users to search from all centrally-indexed newspaper collections, all featured newspapers, or a specific featured newspaper category.

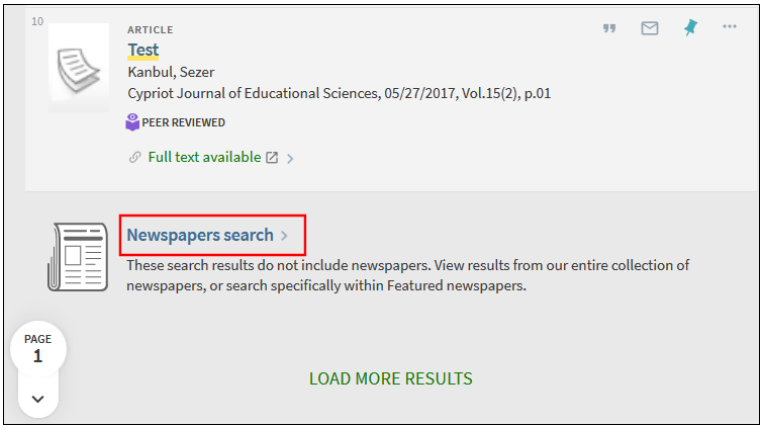
   - The Featured Newspapers section on the new Newspaper Search page allows end users to view and search featured newspaper categories that are configured by staff.



- On the results page for regular searches that include the Primo Central index, the following options will allow users to access the centrally-indexed newspaper content, which no longer displays in regular searches:
  - The **Newspapers search** facet value has been added under the Resource Type facet in the Tweak my results section.



  - The Newspapers Search link will display after the last record on the Brief Results page.



2. **How is Newspaper Search Going to Affect Blended Searches?**

   Primo will no longer return centrally-indexed newspaper content in regular searches that include the Primo Central index. All centrally-indexed newspaper content is returned exclusively by Newspaper Search.

   Note

   All locally-indexed newspaper content will continue to be returned in regular searches.

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3. **How do I enable Newspaper Search?**

   Newspaper Search is enabled by setting both of the following fields in the Primo Back Office:

   - The **Newspapers Search** check box in the Institution Wizard (**Primo Home > Ongoing Configuration Wizards > Institution Wizard**) enables the feature at the institution level.
   - The **Display link to Newspapers Search** check box in the Views Wizard (**Primo Home > Ongoing Configuration Wizards > Views Wizard**) allows you to enable/disable the feature per view.

   For additional configuration information, see Configuring the Newspaper Search Interface.

4. **What configuration options are available for the new Newspaper Search interface?**

   Apart from enabling and disabling Newspaper Search, you will also be able to control the display of Featured Newspapers on the Newspaper Search page. This section will be turned on by default, but it will only display after you have uploaded newspapers of your choice to be featured. For information on how enable and configure Featured Newspapers, see Configuring Featured Newspapers.

   As with all other Primo features, all labels and text are configured with code tables.

5. **How do I know what collections are part of the Newspaper search?**

   The collections (including all new ones) are listed in the collection list of your institutional profile, which is accessible via the Primo Back Office.

   We have added two new filters: one that identifies collections that contain newspaper content that is available to both the Primo Central index and Newspaper Search, and another that identifies newspaper collections that are only available to Newspaper Search. The latter filter helps you especially if you are testing Newspaper Search on your sandbox because there are a number of new collections that are only available in Newspaper Search. This may explain some of the differences that you will see in the number of search results between your sandbox (which has enabled Newspaper Search) and the production environment that displays newspaper content only from the Primo Central index.

You can activate and deactivate newspaper collections for search and delivery in the same way as all the other Primo Central collections. We recommend that you only activate newspaper collections to which your subscription includes full text because their search activations will indicate that content is available to the user.

6. **What happens with hybrid collections? Are they part of Newspaper Search, and will they still appear in the results for the classic Primo UI?**

   Once you activate Newspaper Search, the newspaper content will appear only in the new Newspaper Search interface. This also applies to hybrid collections such as aggregator databases that contain—for example, journal articles as well as newspaper articles. While the newspaper articles will move to Newspaper Search, the journal articles will continue to display in searches using the Primo Central index.

7. **How can I ensure that the newspapers I subscribe to are flagged as available?**

   Because most newspaper collections are not selective, they are set to available at the collection level. This happens automatically as soon as you activate a collection in the collections list of your institutional profile for search.

Back Office Configuration Changes for the New UI

Introduction

With the new UI, the goal was to use the existing configuration as much as possible to prevent a long, complex implementation process and to provide a smooth transition from the classic UI to the new UI. You will continue to use the Views Wizard, mapping tables, and code tables to configure your views. This document focuses on the changes that were made to the Back Office to support the new UI.

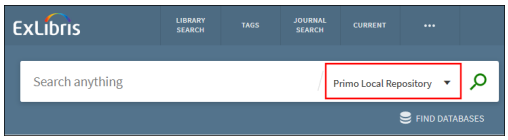
The switch to the new Primo UI requires SSL (see Checklist for using https:// in Primo New UI).

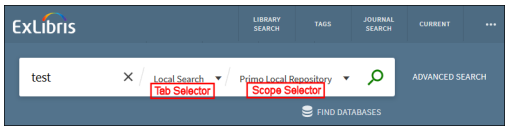
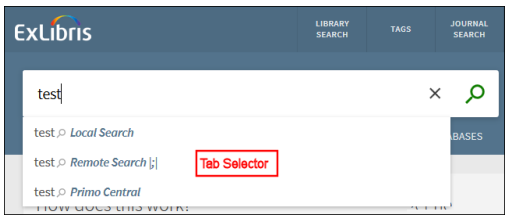
Views Wizard

In addition to the classic UI, the Views Wizard is used to configure views for the new UI. For more information, see Views Wizard. The following table indicates which fields in the Views Wizard are relevant to the new UI.

Parameters Used for the New UI

Configuration Option	New UI?	Comments
General View Attributes:		
Default user institution	Yes	
Is template/Inherits	Yes	
Enable My Library Card	Yes	
Invoke automatic search when tabs are switched	Yes	The automatic search is between scopes.
Enable the “Personalize Your Results” service	Yes	
Enable Citation Trail	Yes	
Default Institution	Yes	

Configuration Option	New UI?	Comments
Session timeout URL	No	In the new UI, the home page always displays after a timeout.
Side bar (Tweak my results) position (New UI only)	Yes	Allows you to configure which side the facets appear in the new UI.
Layout Set (Classic UI only)	No	Included with the customization package.
CSS and Mobile CSS (Classic UI only)	No	Included with the customization package.
Mobile CSS (Classic UI only)	No	
Default interface language	Yes	
Search Scopes List:		
Search scopes	Yes	The scopes appear as follows in the new UI: • If a single tab is configured, users can select scopes from the drop-down list on the Home page:  **Scope Selection on the Home Page** • If multiple tabs are configured, users can select scopes per tab on the Brief Results page: **Scope Selection on the Brief Results Page**
Tabs List:		
Tabs list	Partially	The tabs appear as follows in the new UI: • For simple searches:

Configuration Option	New UI?	Comments
		◦ On the Brief Results page, a drop-down list will appear in search boxes.  **Tab and Scope Selection on the Brief Results Page** ◦ On the Home page, users can select a specific tab from the search suggestions.  **Tab Selection on the Home Page** • For advanced searches, the tabs will appear as radio buttons above the query lines.
Basic Search Tile:		
Media type	No	Pre-filters are available with advanced searches only.
Search operators	No	Search operators are available with advanced searches only.
Search Target Fields	No	Search targets are available with advanced searches only.
Advanced Search Tile:		
Search pre-filters	Yes	
Display "Find Database" Link	NA	
Main Menu Tile:		
Contents of Main Menu Tile	Yes	Links should display as follow: • Customers links are per configuration. • See Main Menu links.

Configuration Option	New UI?	Comments
Static HTML Tile:		
Contents of HTML Tile	No	Included with customization package. For more information, see New UI Customization - Best Practices.
Full Results Tile:		
Field to display in the full results	Yes	
Links to display in full results	Yes	
Send To Tile:		
SMS	Yes	SMS is planned for a later release.
Brief Results Tile:		
E-Shelf	No	Always appears, but it can be removed in the CSS.
Define Sign-in message (in new UI)	Yes (new parameter on the Brief Results tile)	Indicates whether to display the sign-in message on the Brief Results page. The following options are valid: • **Not Signed-in users** – When the sign-in message is enabled, the message displays only for users who have not signed in. • **Off-campus and not Signed-in users** – When the sign-in message is enabled, the message displays only for users who are off campus or have not signed in.
Define link from title	No	Clicking the title always opens the Full Display. The availability statement is a link to full text, Get It, or OvL. (See Availability Links in Brief Results.)
Define FRBR (Primo Local) display	Yes	
Order of Tabs	Yes	The tabs are now referred to as services and appears as sections in the Full Display only.

Configuration Option	New UI?	Comments
		Because the GetIt1 and locations are combined under the Get It section in the new UI, the order setting for Locations will be ignored. Links that display in the Details tab of the classic UI will now appear under the Links section in the Full Display of the new UI.
Brief record display	Yes	
Sort Fields of the brief results	Yes	
Snippet Display Options	Yes	
Institution Boost	Yes	
Networks: (facebook)	No	Not planned for the new UI, yet.
Number of records	No	The new interface includes both infinite load (which allows users to load 10 additional results to the page at a time) and pagination. We will continue to track usage and performance to determine whether changes should be made to the number of results that are loaded at a time.
Refine My Results (facets) Tile:		
Display "Show only" facets on the top of the brief results list	No	
Display "Show only" facets on top of "Refine My Results"	Yes	There is an option to disable it and add ‘Top level’ facet in the facets list. In this way the customer can configure the number of values to display and sort option.
Display "RSS", "Save Search" and "Add page to e-Shelf" on top of the facets options	Yes	Add page to e-shelf will not be added since there are no pages in the new UI.
Facets to display	Yes	The tabs are also taken into account by checking the tab to which the scope is linked.

Configuration Option	New UI?	Comments
Locations Tile:		
Real Time Availability	Yes	
Sort locations by user institution	Yes	
Include only locations belonging to the institution of the view	Yes	
Display Item list filters	Yes	

Mapping Tables

Most of the existing mapping tables are still used for the new UI (see Mapping Table Reference). The following changes have been made to the mapping tables to support the new UI:

Mapping Table Changes for the New UI

Table	Description
Actions List (modified)	For information on the new **Up-front Actions** field, see Actions.
Bulk Definition (modified)	For My Library Card, the **OVP loans paging** parameter is ignored since the constant bulk size is 10.
GetIT! Link 1 Configuration (modified)	For information on the new **Availability/Service** field, see Availability Statement.
My Account Menu Configuration - OvP (modified)	Defines the existence of the My Library Card tabs, but does not control the order of the tabs. The new Overview tab always appears and cannot be hidden. You must use CSS to configure the order.
Items Brief Display (new)	See Get IT 1 Services.
User Login Links (new)	See Sign-In Page.

Table	Description
PushTo Adaptors (no change)	Unlike the classic UI, the new UI does not support customer-defined PushTo adaptors.

More details on the changes to the mapping tables are described in the following sections.

Code Tables

Most of the existing code tables are still used for the new UI (see Code Table Reference). The following changes have been made to the code tables to support the new UI:

Code Table Changes for the New UI

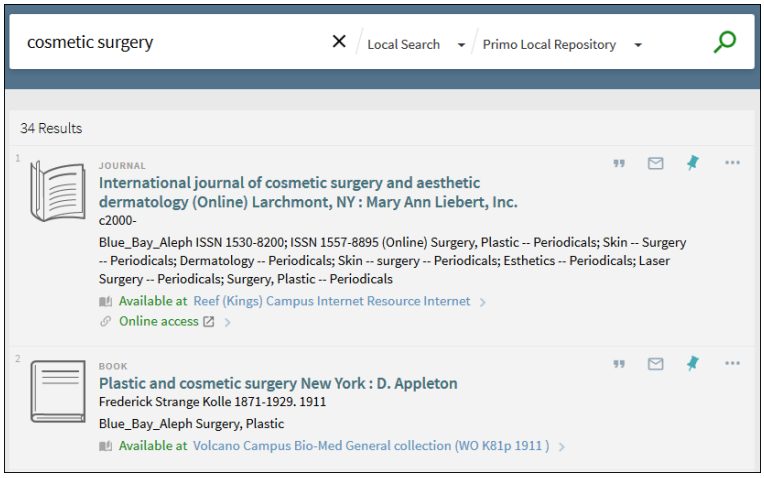
Table	Description
GetIT! Tab1 (modified)	Added labels (such as the name displayed for the GetIT1 services) for the View It and Get It sections on the Full Display page in the new UI. Each of the new labels are prefixed with `nui`. For example, the following delivery codes display the **View Online** heading in the Full Display: • `default.nui.getit.tab1_onl_norestrict` • `default.nui.getit.tab1_onl_mayrestrict` • `default.nui.getit.tab1_restrict` • `default.nui.getit.tab1_full` • `default.nui.getit.tab1_mayrestrict` • `default.nui.getit.tab1_norestrict`
GetIT! Tab2 (modified)	Added the following codes to support the **Click here for more options** message that displays in the More section on the Full Display page in the new UI. Each of the new labels are prefixed with `nui`. For example: `default.nui.getit_full.tab2_notexistcheck`
Get it service labels (new)	This table defines labels for various subsections, messages, and back links in the Get It section on the Full Display page in the new UI. Each of the new codes are prefixed with `nui`. For example, the following code displays the **Locations** header: `default.nui.locations.header`
User Login (modified)	See Sign-In Page.
Advanced Index Fields Labels (New)	Defines the search field drop-down values in the Advanced Search Box.

Table	Description
Library card Labels (new)	See Brief Display of an Item.
Suggestions labels (new)	Defines the labels associated with the Suggestions area of the Full Display.
Favorites Labels (new)	Defines the labels used on the My Favorites page.
Tags Tile (modified)	Defines the labels used on the Tags page.

More details on the changes to the mapping tables are described in the following sections.

Brief Results Page

The Brief Results page displays the search results. This section focuses on the changes that are relevant to the new UI.



Brief Results Page

Availability Statement

The availability statement in the new UI is a link that directs users to either of the following pages:

- An external page:
  - Alma directs to the item's full text.
  - SFX directs to the item's full text.

- Primo directs to link to resource if there is a single link for the record. Otherwise, the link displays the record's full display to allow users to select a link.
- Primo directs to OPAC via link.
- Other scenarios configured in the new column as **Out** in GetIT! Link 1 Configuration mapping table. See Get It Service for more details.

- The Full Display page on which attention is focused on the relevant GetIt1 service:
  - Get it (Alma) – Full display focusing on Get It service with Alma Get It mashup.
  - Get it (Aleph/Voyager) – Full display focusing on Get it service with Request & Locations.
  - View it (Alma) – Full display focusing on View It service with Alma View It mashup.
  - View Online – full display focusing on View Online service.
  - Other links scenarios configured in the new column as **Full** in GetIT! Link 1 Configuration mapping table. See GetIT 1 Services for more details.

If the item has both an online and a physical copy, an availability statement will appear for each on separate rows.

Multiple Availability Statements

Note

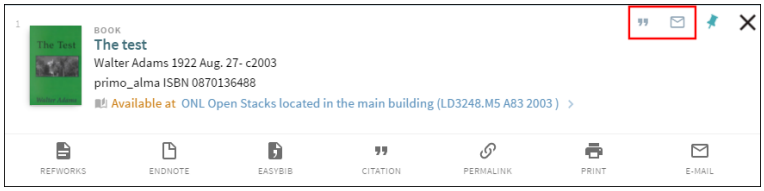
The out-of-the-box configuration covers all of the out-of-the-box delivery scenarios so there should be no need to make any changes. For more details, see GetIT 1 Services.

To support the display of the availability statement in the new UI, an enrichment must be applied by either executing a pipe manually or running RTA. This means that existing customers who are not running RTA will need to reload their data to apply the enrichment.

Actions

The Actions List mapping table will continue to configure the actions for the classic and new UIs, but the **Up-front Actions** field has been added to support the actions that appear without clicking the ellipsis icon

in the new UI. The following figure highlights the up-front actions.



Up-Front Actions

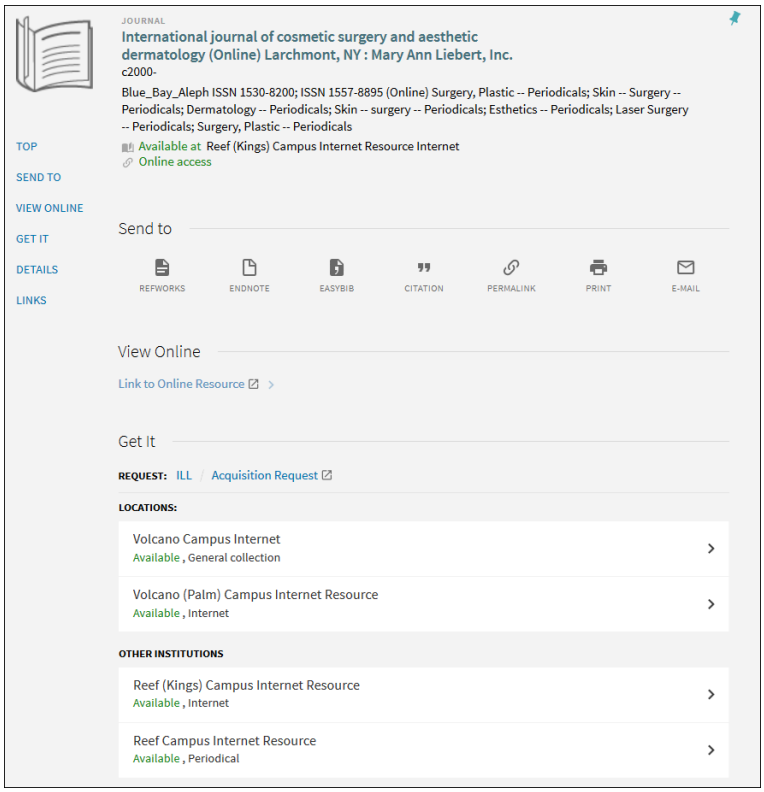
From right to left, the e-Shelf action should be set to **1**, the two up-front actions should be set **2** and **3**, and all other actions should be left blank. The order of the actions for the complete list of actions is determined by the **Order** field, from right to left.

Note

- Settings for local send-to actions and Delicious will be ignored. In the November release, the customization package will be used to configure the local actions.
- The SMS action will be added in a later release.

Full Display Page

The Full Display page displays the services for a selected item. This section focuses on the changes that are relevant to the new UI.



Full Display Page

GetIT 1 Services

For OvP, the Get It section in the new UI takes the information in the Request and Locations tabs from the classic UI and displays it in the Requests and Locations subsections of the Get It section. The configuration is very similar to the classic UI. For Alma, the mashup for the Get It tab displays under the Get It section on the Full Display page. The following changes were made to support the new UI:

- The **Availability/Service links** field has been added to the GetIT! Link 1 Configuration mapping table to define how the system handles the Getit1 links (including View It and View Online). For more details, see GetIT Links.
- The Items Brief Display mapping table has been added to configure the details that appear in brief display of an item on the Full Display page. There is an option to define up to three parameters per field and the delimiter that displays between them.
- The Get it service labels code table has been added to configure the labels for this service on the Full Display page. All other labels are taken from existing code tables.

View Online Service

The View Online section displays the links that link either to the resource or to the link resolver system. Clicking a link opens the link in a new page instead of in an i-frame (which was done in the classic UI). This is to prevent displaying external unresponsive or insecure HTTP content within an i-Frame in the new Primo UI. The text that displays for each type of link is determined as follows:

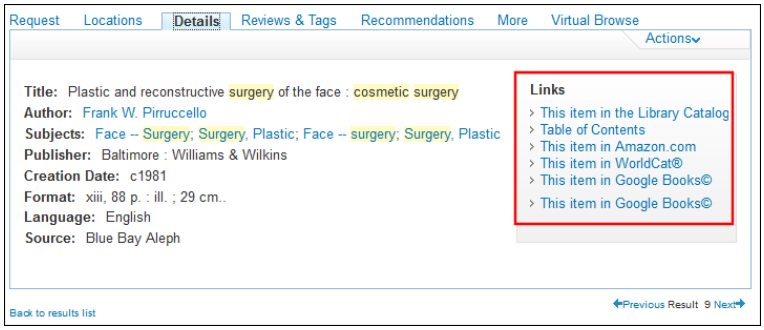
- Link-to-resource link – the text is taken from the **$$D** value of the **linktorsrc** field in the PNX (which is the same as the classic UI).
- For all the other cases or when there is no **$$D** value in the **linktorsrc** field – the text is taken from the new codes in the Tab 1 Label Code code table. The codes starts with `default.nui.getit_full.*` text. The relevant code is calculated based on the existing GetIT! Tab 1 Text Configuration mapping table with the combination of Delivery Category Code, Availability Status Code, and Data Source Code).

Note

For Alma-E and Alma-D records, the mashup for the View It tab displays under the View It section in the record's full display. In situations where an Alma-P record has links to an online resource in the MARC 85640 and 85641 tags, Primo uses the Online Resource delivery category and displays the links from the links/linkstorsrc PNX field under the View Online section in the record's full display. For information on changing the label for this service to **View It**, see Configuring Primo Delivery of Alma Data and Services.

Links Service

The links that display in the Links section of the new UI's Full Display are taken from the Links section in the classic UI's Details tab. No new configuration is necessary.



Details Tab in the Classic UI

More Service

The More service displays additional links, which are configured with the GetIT 2 delivery mapping and code tables. To support the new UI, the **Service Link** field was added to the GetIT! Link 2 Configuration mapping table. This new field indicates whether to display Alma's mashups or the links to the external sites on the Full Display page. For more details on configuring links, see GetIT Links.

Main Menu Links

The links that display in the Main Menu are still configured in the Main Menu tile of the Views Wizard. The out-of-the-box links will continue to open the classic UI pages until new UI pages are ready. In addition, some of the out-of-the-box links do not currently display in the new UI. The following table describes each of the out-of-the-box links:

Link	Description
Library search	Displays and opens the new UI home page in the current window.
Tags	Opens the new Tags page in the current tab/window.
A-Z	Opens in a new tab/window. For Alma, it opens the Journal Search page in a new tab/window.
Citation linker	The Fetch Item page opens in a new tab/window.
Help	See New UI Customization - Best Practices.
Collections	Displays and opens in a new tab/window.

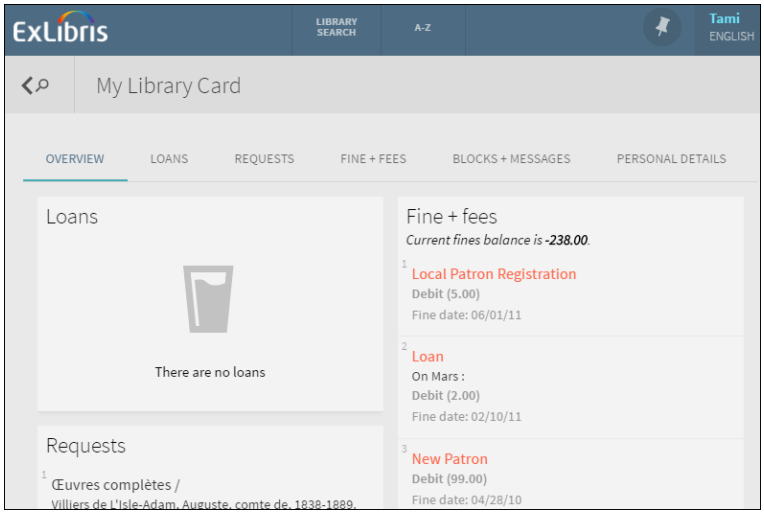
The descriptions of the links display in the tooltip and links page (when clicking on '…') are defined in the View labels code table. The codes of the out-of-the-box links are already defined, and the codes for other links should be defined in the table.

Note

Customer's link descriptions should be created after May release. Until the description is created, the code will display.

My Library Card

The My Library Card page replaces the My Account page in the new UI. It includes a new Overview tab that allows users to see a summary of all tabs under My Library Card.



My Library Card

Brief Display of an Item

The following mapping tables are used to configure the brief display of items in the Loans, Requests, and Fines tabs, respectively:

- Loans Brief Display
- Requests Brief Display
- Fines Brief Display

In each of the associated pages, the first row of the brief display contains the most important information and is not configurable. The second row, which is configurable, allows you to define up to three parameters per field and the delimiter that separates them.

The new Library card Labels code table defines the labels for the brief display. Out of the box, only the fields that require text have been defined.

Full Display of an Item

The fields that display in the full display of an item in the Request, Loans, and Fines tabs are taken from the following existing mapping tables, respectively:

- `<type of request>` Request Detailed Display
- Loans Detailed Display
- Fines Detailed Display

Note

To prevent duplication of information, do not include fields that already display in the brief display of the item.

Personal Details

The Personal Details page allows users to update their personal information, which is divided into the following sections:

- **Registration -** Expiry date and patron group display under the Personal details heading.
- **Address** - Includes the following address-related fields:
  - address_1 - address_5
  - city
  - state
  - zip
  - address_valid_from
  - address_valid_to
- **Contact** - Includes the following contact information:
  - telephone_1 - telephone_4
  - sms_number
  - my_email
- **Actions** -
  - mail_attachment (Aleph only)
  - sms_authorized
  - Library notices flags (Alma only) – This section displays which library notices are sent to the user. If a notice is enabled in Alma, the user will be able to modify its setting in My Library Card. For details on how to configure library notice flags in Alma, see Configuring Library Notices Opt-In. The display of these flags in My Library Card is **not** configurable with the Personal Settings Fields mapping table.

The Personal Setting Fields mapping table allows you to select which fields to display on the Personal Details page.

Alert Notifications

My Library Card will display alert notifications in various places to let users know that they may be required to perform an action due to a borrowing activity. These alerts will display in the following areas to make sure that the user is aware of a required action:

- Next to a specific tab at the top of My Library Card
- Next to an item in a borrowing activity tab (such as the Loans or Requests tabs)

The following types of notifications are provide by the new UI:

- Loan due or overdue

  – This notification indicates that a borrowed item is almost due or overdue. For additional configuration information, see Loan Alert Configuration.

- Hold ready

  – This notification appears when a requested item is ready for pickup.

- Blocks or messages

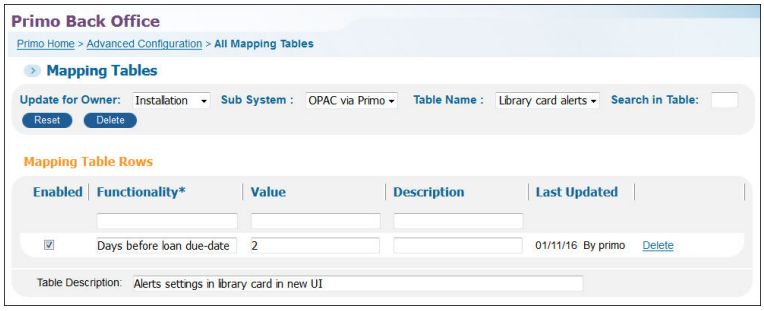
  – This notification may indicate that a particular activity has been blocked or that the library has sent a message.

- Fines and fees

  – This notification indicates that the user has incurred a fine or a fee.

Loan Alert Configuration

The new Library card alerts mapping table allows you to configure the alert that displays for loan when a loan is due soon or is overdue. You can specify the number of days before a loan is due to display the alert.



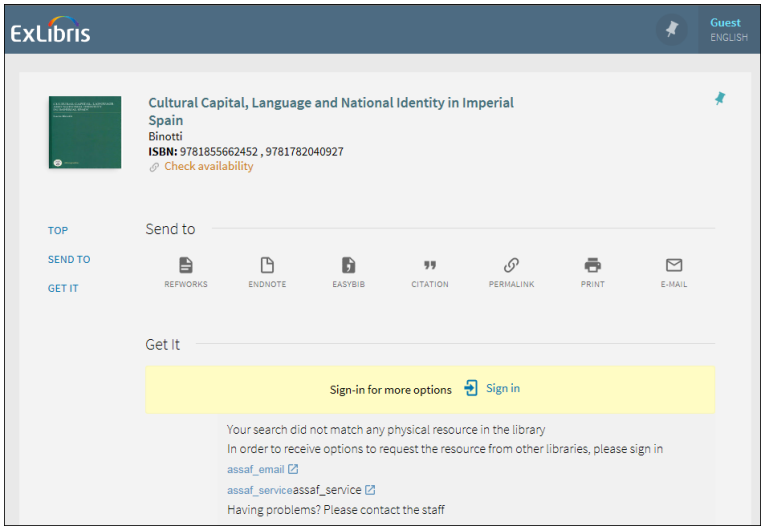
Library Card Alerts Mapping Table

Note

If you want display the loans with the alert at the top of the list, you will need to configure the ILS to retrieve the list by due-date ascending.

Services Page

Because the new Primo UI uses your institution's view as the basis for Alma's Services page, it is no longer necessary to create and configure a separate view for the Services page. This allows you to use a single configuration for both your institution's view and the Services page.



New Services Page

The following elements on the new Services Page are suppressed either internally or through CSS:

- Links menu
- Search section
- Details service – All of the open URL data displays in the brief display, see below.
- Brief display – Consists of the following elements, which are not configurable:
  - Thumbnail appears on the left side.
  - Resource type above the title does not display.
  - First line – title
  - Second line – creator, creation date
  - Third line - identifier
  - Fourth line - is part of

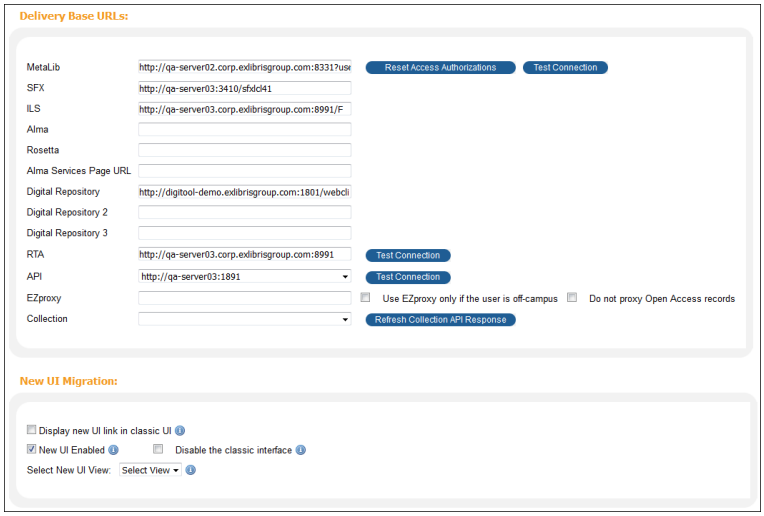
Note

If you want to test the Services Page in the new UI prior to enabling it, you can use the following format:

`http://<Primo_domain>/primo-explore/openurl?institution=<Primo_institution_code>&vid=<Primo_view_code>`

To enable the new UI's Services Page:

1. In the Primo Back Office, access the Institution Wizard (**Primo Home > Ongoing Configuration Wizards > Institution Wizard**).
2. From the list of institutions, edit your institution.
3. Select the **New UI Enabled** check box to redirect users to the new UI's Services Page. Because of this redirection, it will not be necessary to change the base URL in the source system (such as Google Scholar).



Institution Wizard

4. Select your institution's view from the **Select View** drop-down list.

Note

- If you do not select a view, Primo will use the view specified in the OpenURL request.
- If you are receiving bX recommendations in the classic UI (which is indicated by the **bX Token** field), you must populate the **Alma Services Page URL** field to allow users to display the full record for titles clicked in the Related Reading section of the new UI.

---

5. Save and deploy your changes to the Front End.

Sign-In Page

On the Primo Sign-In page (which displays for Alma and LDAP), you can add links (such as a link to retrieve forgotten passwords) and a description that will appear after clicking **Need help**. The following tables have been added to support this functionality:

- User Login Links mapping table – Allows you to define up to four links that display on the Primo Sign-In page. If only a single link is defined, the link will appear without clicking **Need help**.
- User Login code table – Defines the labels for the links and the description for the Primo Sign-In page.

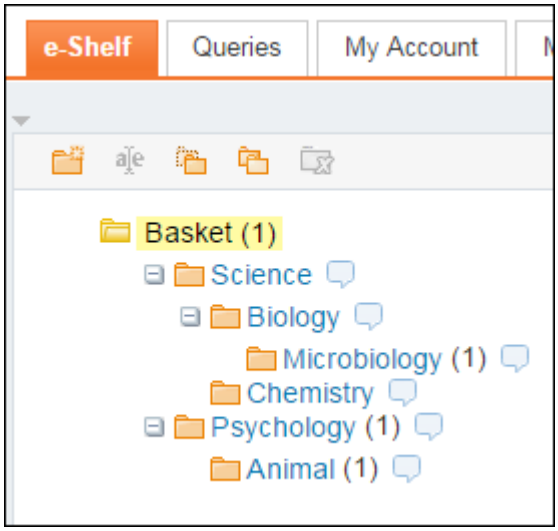
E-Shelf Migration to My Favorites

The new UI uses labels rather than folders to categorize information in My Favorites. Signed-in users will create and then assign labels to items placed in My Favorites.The main difference is that there is no hierarchy between the labels as with the folders in the e-Shelf.

Because folders will no longer exist in the new UI, users' folders must be migrated to the new UI as labels. The following rules will be applied to migrate users' e-Shelf folders and their associated items to the new UI:

- Folder/subfolder names are converted to label names only if a folder/subfolder has items. All items directly under that folder/subfolder are assigned to that label name. If an item belongs to a subfolder, it will not be assigned to its higher-level folders as well.
- Items stored directly under the Basket folder in the e-Shelf will not be assigned a label, but users can still list them by selecting the **Unlabeled items** filter in the new UI.

For example, if an e-Shelf in the classic UI contains the following items and folders:



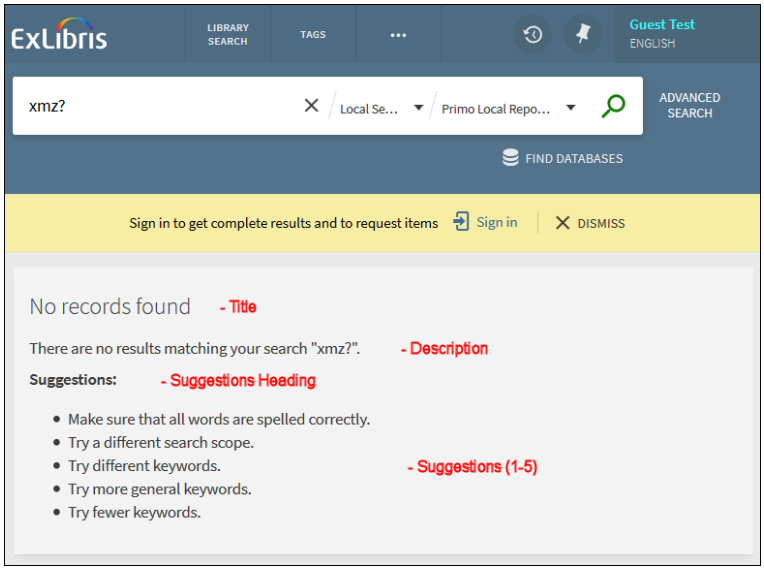
Folders in e-Shelf

My Favorites in the new UI will show labels for the folders/subfolders that had items. In addition, the item stored directly under the Basket folder was placed under the Unlabeled items filter:

Labels in My Favorites

No Results Page

The No Results Page has been added to provide feedback to users that have entered search queries that yield no results. This can occur for many reasons, such as when the user's query contained a misspelling or too many keywords. To help end users find what they are looking for, the No Results Page will include up to five suggestions to help them to improve the search query.



No Results Page

The Error Messages code table (**Primo Home > Advanced Configuration > All Code Tables > Front End**) allows you customize and translate the labels and suggestions that appear on the No Results Page, which consists of the following areas:

- **Title** – The No records found label appears in all cases in which no records were found.

  `default.nui.noresults.title – No records found`

- **Description** – Depending on the reason in which no results were returned, the system may display a different description. The following description is general and displays when the user has not exceeded any query limits and no results were found:

  `default.nui.noresults.description – There are no results matching your search "{{term}}".`

- **Suggestions Heading** – Depending on the reason in which no results were returned, the system will display one of the following headings:

  - General suggestions:

    `default.nui.noresults.suggestions – Suggestions:`

  - Search limit suggestions (see Search Limits).

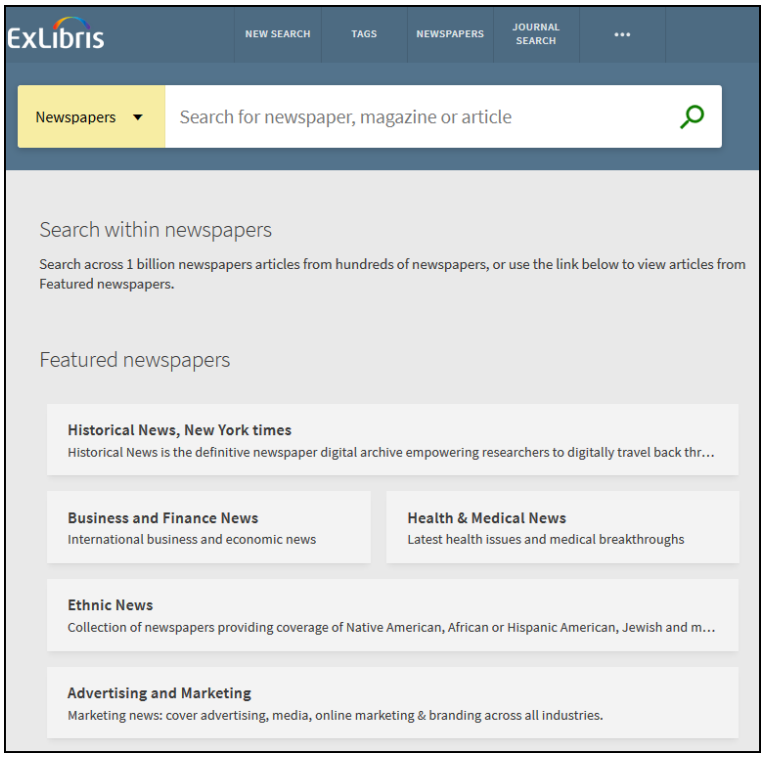
    `default.nui.search.error.noresults.suggestions.header – MAY WE SUGGEST:`

- **Suggestions** – Depending on the reason in which no results were returned, the system will display up to five suggestions. The following suggestions are general and display when the user has not exceeded any query limits and no results were found:

- default.nui.noresults.suggestions1 – Make sure that all words are spelled correctly.
- default.nui.noresults.suggestions2 – Try a different search scope.
- default.nui.noresults.suggestions3 – Try different keywords.
- default.nui.noresults.suggestions4 – Try more general keywords.
- default.nui.noresults.suggestions5 – Try fewer keywords.

Configuring the Newspaper Search Interface

The Newspaper Search page (new UI only) has been added to allow users to search only for newspaper content from a separate index that contains various and more specialized newspaper collections. The results page shares the same configuration as the regular results page and contains the same pagination, navigation, and sort options and facets.



Newspapers Search Page (New UI Only)

Enabling the Newspaper Search Interface

Newspaper search is enabled at both the institution and view levels. This allows you to enable this feature as needed per view.

To enable Newspaper Search:

1. Edit your institution with the Institution Wizard (**Primo Home > Ongoing Configuration Wizards > Institution Wizard**).
2. Select the **Newspapers Search** check box.
3. Save and deploy your changes.
4. Edit your view with the Views Wizard (**Primo Home > Ongoing Configuration Wizards > Views Wizard**).
5. On the Edit View Attributes page of the Views Wizard, select the **Display link to Newspapers Search** check box.

6. On the Titles Configuration page of the Views Wizard, edit the Home Page > Main Menu tile to make sure that the Newspapers Search link is configured as follows:

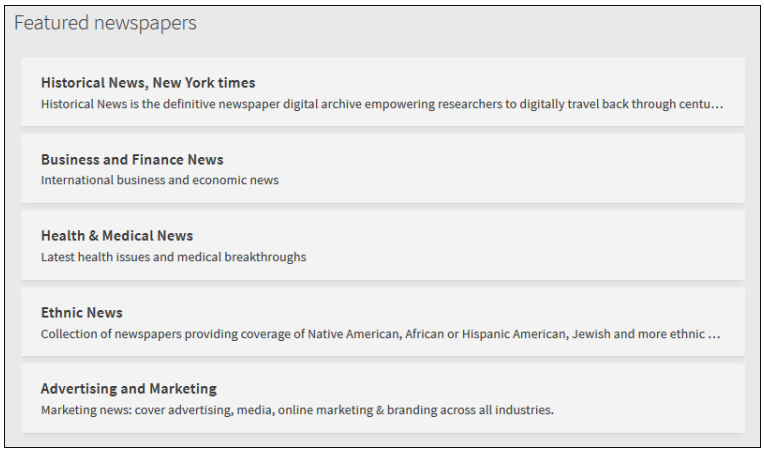
Code	Label	URL	Link should open in
newspapers_search			current window

7. Save and deploy your changes.

Configuring Featured Newspapers

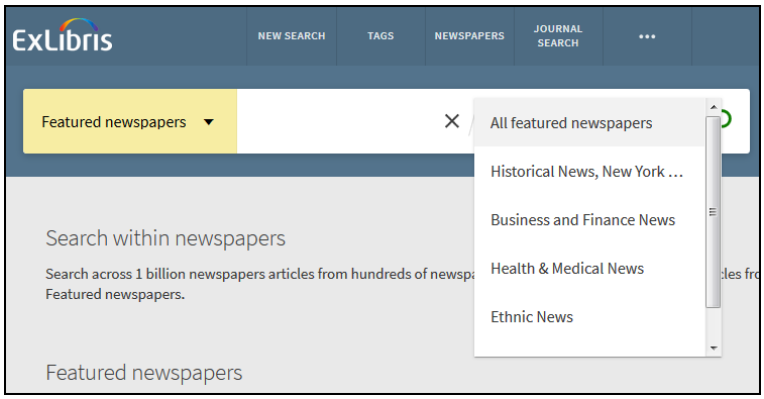
The Featured Newspapers option allows users to search from newspapers that you have selected and categorized using either of the following methods:

- Click a link in the Featured Newspapers section to display all matching results for the selected category, From these results, users can then search within the selected category to narrow the search.



Featured Newspapers Section

- Select the **Featured Newspapers** option in the search box, specify a search string, and then select the category from an additional drop-down list that appears in the search box.



Featured Newspapers Search Option

The Featured Newspapers option is enabled at the view level and is configured with the Featured Newspapers mapping table.

To enable and configure Featured Newspapers:

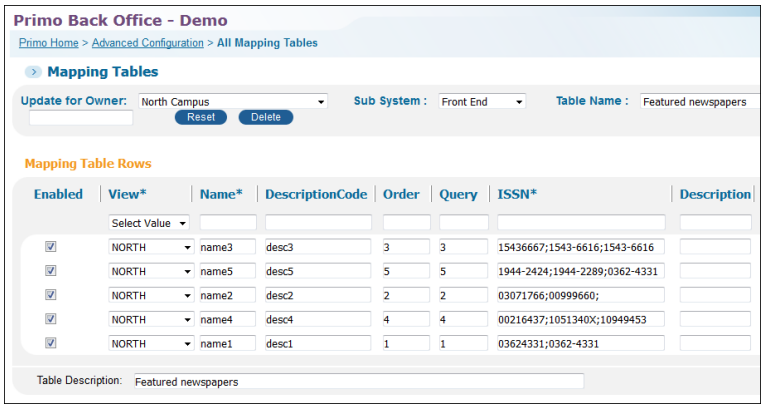
1. Edit your view with the Views Wizard (**Primo Home > Ongoing Configuration Wizards > Views Wizard**).
2. On the Edit View Attributes page of the Views Wizard, select the **Display Featured newspapers** check box.
3. Save and deploy your changes.

Note

The Featured Newspapers section will not display until you have configured the Featured Newspapers mapping table.

---

4. Edit the Featured Newspapers mapping table (**Primo Home > Advanced Configuration > All Mapping Tables**).



Featured Newspapers Mapping Table

5. Specify the following fields to create a category of newspaper articles to display in the Featured Newspapers section of the Newspaper Search page:
   - **Enabled** – Select this field to enable the featured newspaper category.
   - **View** – Select the view to which you want to display the featured newspaper category.
   - **Name** – Specify the code name for the category. The display label for the category is defined with the Newspapers Search code table.
   - **DescriptionCode** – Specify the code name for the category's description. The display label for the description is defined with the Newspapers Search code table.
   - **Order** – Specify the order in which the category displays in the Featured Newspapers section. The valid values are 1, 2, 3, and so forth.
   - **Query** – Future use.
   - **ISSN** – Specify the ISSN of the newspaper. You can specify a maximum of 10 ISSNs per category by separating them with a semicolon. For example: 0362-4331;1085-6706
   - **Description** – An optional description to internally document the category.

Note

You can define a maximum of five categories per view (including disabled categories).

6. Save and deploy your changes.

Configuring Display Labels

The labels associated with Newspaper Search appear on various pages in the New UI. The following table lists the code tables used to customize these labels.

Configuring Display Labels

<table>
<tr><th>Code Table</th><th>Description</th></tr>
<tr><td>Newspapers Search code table</td><td>This code table defines all labels associated with the Newspaper Search page.
<table>
<tr><th>Code</th><th>Description</th></tr>
<tr><td>default.nui.newspapers_ search.desc_withfeatured</td><td>Search across 1 billion newspapers articles from hundreds of newspapers, or use the link below to view articles from Featured newspapers.</td></tr>
<tr><td>default.nui.newspapers_ search.title</td><td>Search within newspapers</td></tr>
<tr><td>default.nui.newspapers_ search.featured.all</td><td>All featured newspapers</td></tr>
<tr><td>default.nui.newspapers_ search.desc_nofeatured</td><td>Search across 1 billion newspapers articles from hundreds of newspapers.</td></tr>
<tr><td>default.nui.newspapers_ search.featured.title</td><td>Featured newspapers</td></tr>
</table>
Note
For each Name and DescriptionCode that you define in the Featured newspapers mapping table, an associated code table row is created to allow you specify the displays labels for the featured newspaper categories and their descriptions.</td></tr>
<tr><td>Facet Labels code table</td><td>This code table defines the facet labels that display in the UI.</td></tr>
</table>

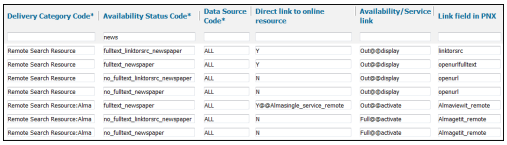
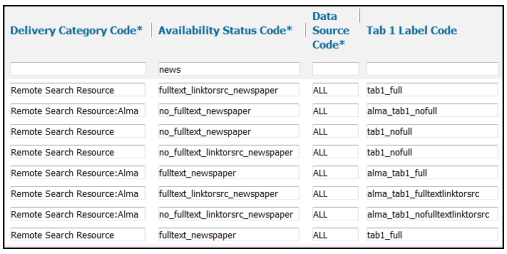
<table>
<tr><th>Code Table</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Code</th><th>Description</th></tr>
<tr><td>default.facets.facet.facet_rtype_
newspapers.tooltip</td><td>Newspaper results are excluded from the default search. Click to search within newspapers.</td></tr>
<tr><td>default.facets.facet.facet_rtype_
newspapers</td><td>Newspapers search</td></tr>
</table>
</td></tr>
<tr><td>Facet Resource Type code table</td><td>This code table defines the facet labels that display in the UI for the resource type. This facet appears only on result pages in which the results no longer contain newspaper content.
<table>
<tr><th>Code</th><th>Description</th></tr>
<tr><td>default.facets.facet.facet_rtype.newspaper_articles</td><td>Newspaper Articles</td></tr>
</table>
</td></tr>
<tr><td>Calculated Availability Text code table</td><td>This code table defines the availability labels that display in the UI.
<table>
<tr><th>Code</th><th>Description</th></tr>
<tr><td>default.delivery.class.fulltext_newspaper</td><td>getItGreen</td></tr>
<tr><td>default.delivery.class.no_fulltext_newspaper</td><td>getItRed</td></tr>
<tr><td>default.delivery.code.no_fulltext_linktorsrc_newspaper</td><td>No full-text</td></tr>
<tr><td>default.delivery.class.no_fulltext_linktorsrc_newspaper</td><td>getItRed</td></tr>
<tr><td>default.delivery.code.fulltext_newspaper</td><td>Full text available</td></tr>
<tr><td>default.delivery.code.no_fulltext_newspaper</td><td>No full-text</td></tr>
<tr><td>default.delivery.class.fulltext_linktorsrc_newspaper</td><td>GetItGreen</td></tr>
<tr><td>default.delivery.code.fulltext_linktorsrc_newspaper</td><td>Full text available</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Code Table</th><th>Description</th></tr>
<tr><td>Results Tile code table</td><td>This code table defines the labels that display on the Brief Results page.<table>
<tr><th>Code</th><th>Description</th></tr>
<tr><td>default.nui.newspapers.title</td><td>Newspapers search</td></tr>
<tr><td>default.nui.newspapers.description</td><td>These search results do not include newspapers. View results from our entire collection of newspapers, or search specifically within Featured newspapers.</td></tr>
<tr><td>default.nui.newspapers.back</td><td>Back to library search</td></tr>
</table></td></tr>
<tr><td>Search Tile code table</td><td>This code table defines the labels that appear in the search box for the Newspaper Search page.<table>
<tr><th>Code</th><th>Description</th></tr>
<tr><td>default.nui.newspapers.searchbox.featured</td><td>Featured newspapers</td></tr>
<tr><td>default.nui.newspapers.searchbox.description</td><td>Newspapers</td></tr>
<tr><td>default.nui.newspapers.searchbox.help</td><td>Search for newspaper, magazine or article</td></tr>
<tr><td>default.nui.newspapers.searchbox.title</td><td>Newspapers</td></tr>
<tr><td>default.nui.newspapers.searchbox.all</td><td>Newspapers</td></tr>
</table></td></tr>
<tr><td>View Labels code table</td><td>This code table defines the labels associated with the view (such as the links that display in the main menu).<table>
<tr><th>Code</th><th>Description</th></tr>
<tr><td>default.nui.mainmenu.label.newspapers_search.tooltip</td><td>Newspapers</td></tr>
<tr><td>default.nui.mainmenu.label.newspapers_search</td><td>Newspapers</td></tr>
</table></td></tr>
</table>

Configuring Availability and Delivery of Newspaper Content

The following table lists the settings used to configure availability and delivery of newspaper content.

Configuration for Availability and Delivery

Code Table	Description
GetIT! Link 1 Configuration mapping table	The following availability statuses were added to support this functionality: 
GetIT! Tab 1 Text Configuration mapping table	The following availability statuses were added to support this functionality: 

Deep Links for Newspaper Searches

The following deep link formats are supported for searches using Newspaper Search:

- Newspaper Search page:

  `<Primo base URL>/primo-explore/npsearch?vid=<view_ID>&lang=<lang>`

  Example: `https://primo-demo.exlibrisgroup.com:1701/primo-explore/npsearch?vid=NORTH&lang=en_US`

- Search results from all newspaper collections:

  `<Primo base URL>/primo-explore/npsearch?vid=<view_ID>&query=any,contains,<search_terms>&search_scope=`**`all`**`&lang=<lang>`

  Example: `https://primo-demo.exlibrisgroup.com:1701/primo-explore/npsearch?vid=NORTH&query=any,contains,test&search_scope=all&lang=en_US`

- Search results from all featured newspapers (as defined on the Featured Newspapers mapping table):

  `<Primo base URL>/primo-explore/npsearch?vid=<view_ID>&query=any,contains,<search_terms>&search_scope=`**`featured`**`&issn=<issn_list`

  Example: `https://primo-demo.exlibrisgroup.com:1701/primo-explore/npsearch?vid=NORTH&query=any,contains,test&search_scope=featured&lang=en_US&issn=03624331;0362`

- Search results from a specific featured category (as defined on the Featured Newspapers mapping table):

  <*Primo base URL*>/primo-explore/
  npsearch?vid=<*view_ID*>&query=any,contains,<*search_terms*>&search_scope=featured&issn=<*issn_list*

  Example: https://primo-demo.exlibrisgroup.com:1701/primo-explore/
  npsearch?vid=NORTH&query=any,contains,test&search_scope=featured&lang=en_US&issn=00216437;1051

End User Help

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The following help topics are based on the default configuration of the new Primo UI and may not reflect the services offered by your library. Please feel free to contact us if you have any questions or want to see additional topics added. If you are using the classic Primo UI, see End User Help for Classic UI.

- Performing Basic Searches
- Performing Advanced Searches
- Using Browse
- Your Space in Primo
- Using My Favorites
- Using the Brief Results
- Tagging Search Results
- Searching Journals in Alma
- Using Fetch Item
- Using the Full Display
- Feedback Messages

Performing Basic Searches

Return to menu

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.
- If a comma is used to separate words in a list, the comma must be followed by a space. Otherwise, the system will consider the comma to be part of the word and return fewer results than expected.

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

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:

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:

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**.

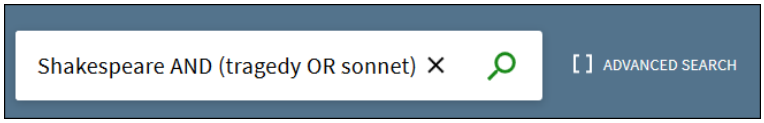
Note

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**.

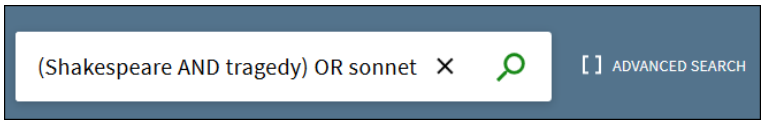
Grouping Terms Within a Query

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**:



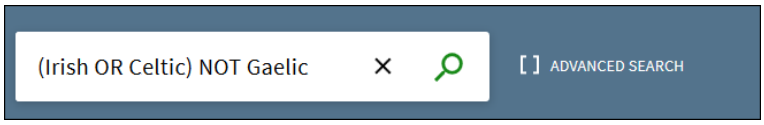
When using more than one operator, it is strongly recommended to use parentheses to clarify precedence. For example, if no parentheses are specified in the above query, Primo will apply the precedence rules (see precedence rules) and instead group the words **Shakespeare** and **tragedy** as follows:



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.

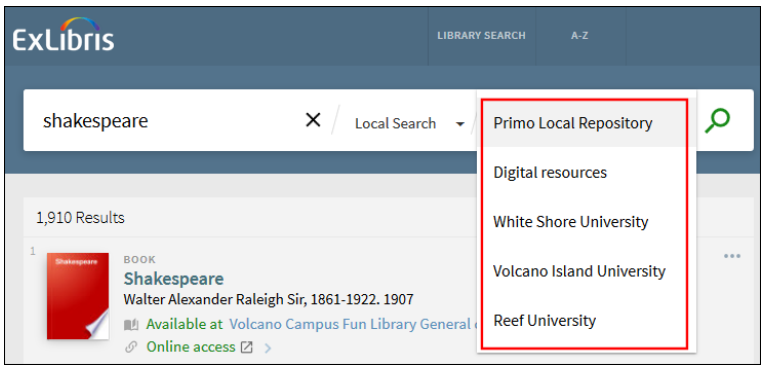
Example 2: The following query searches for records that contain either **Irish** or **Celtic** and do not contain **Gaelic**:



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.

Search Limits

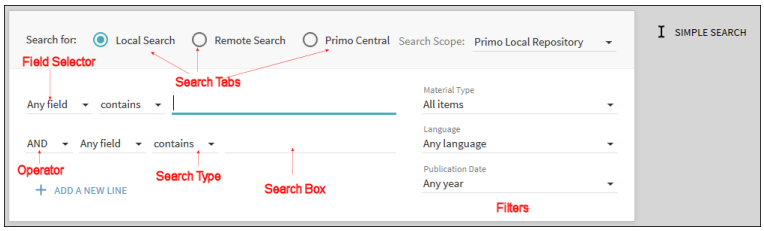
The system will display a message and provide suggestions when the following limits are exceeded:

- The query contains more than 30 boolean operators.
- The query contains more than 8 question marks.
- The query contains more than 8 asterisks and the word length is greater than 2 (such as **abb*** or **ab*c**).
- The query contains more than 4 asterisks and the word length is less than 3 (such as **ab***).
- The entire query consists of a single letter and an asterisk (such as **a***).

Performing Advanced Searches

Return to menu

The Advanced Search page allows you to specify additional lines of criteria, which are not available with the Simple Search (see Performing Basic Searches). In addition, it allows you to specify filters prior to executing the query.



Advanced Search Options

The Advanced Search page contains the following components and options:

- Search for – If provided, search tabs allow you to search within a specific category of materials (such as materials that belong to your institution, course reserves, or any additional repositories that are supported by the library. Whether search tabs are provided or not, you can also limit your search results by specifying search scopes and filters.
- Search Scope – Search scopes allow you to narrow search results further by specifying subcategories that may further limit the scope of searches to a campus, library, or additional search indexes (such as Primo Central).
- Add a New Line – Advanced searches allow you to include a maximum of seven search criteria lines, which contain the following parameters: operator, field selector, search type, and search box.
- Field selector – For each search line, 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 line, 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)**.

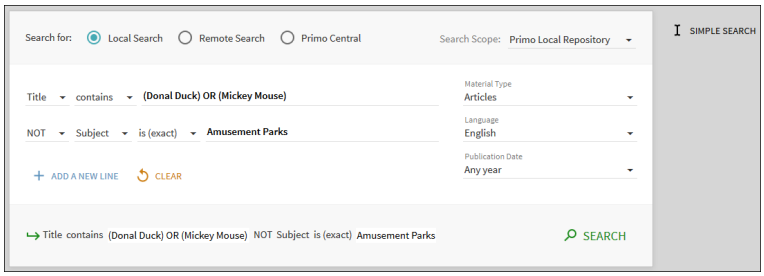
  - **is (exact)** – Returns results that contain phrases that exactly match the phrases specified in the query.
  - **contains** – Returns results that contain all words in the phrase, but the words may be in a different order and may not be as close together.
  - **starts with** – Returns results that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

Note

Because left-anchored searches are permitted with title searches only, the **Field Selector** parameter will display **Title** when **starts with** is selected.

- Operators – As with basic searches, you can include the following operators between words and phrases in each search line: **AND**, **OR**, and **NOT**. In addition, the **Operator** drop-down list allows you to select the operation that is used between search lines. For more information on operator precedence, see Precedence Rules.
- Search box – For each search line, enter the search query text, which may include words, phrases, and operators (**AND**, **OR**, and **NOT**).
- Filters – Filters allow you to narrow your results to specific metadata (such as a material type or date range). In the search results, you can include and exclude facets to filter your results further.

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.

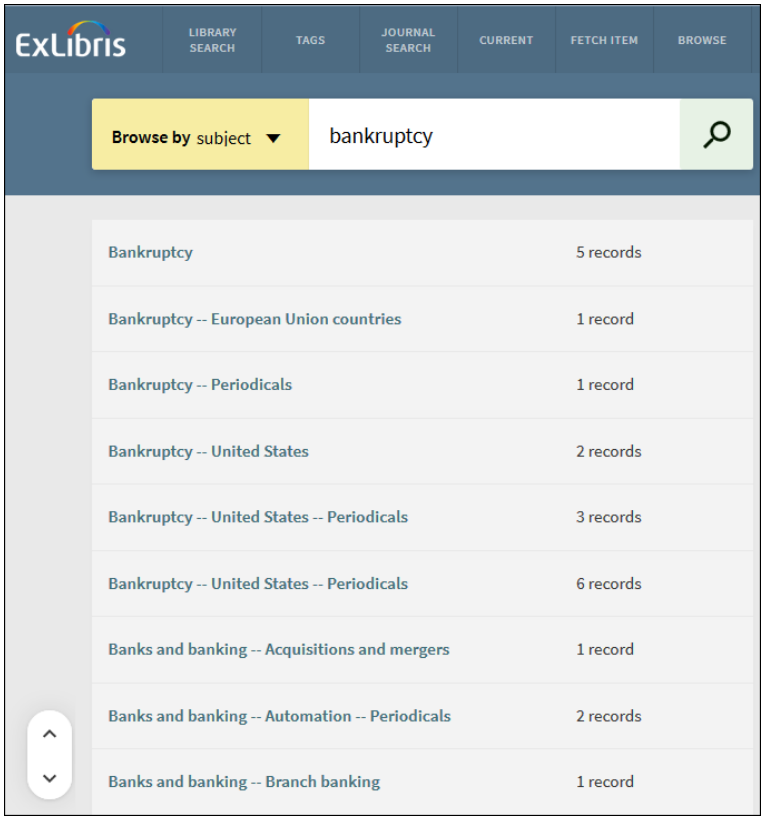


Advanced Search Example with Operators

Using Browse

Return to menu

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.



Example Browse Results by Subject

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

Browse Search Link

Your Space in Primo

Return to menu

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:

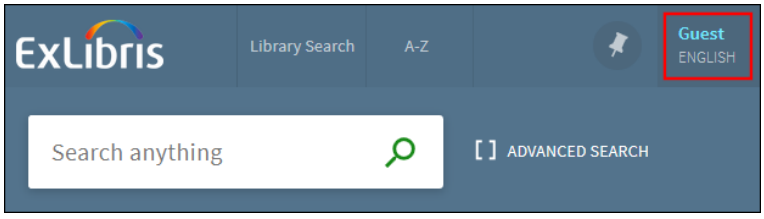
- **Set preferences for your current and future sessions.** You can set your preferences so that they reflect the way you usually search, and save them for future sessions.
- **Add items you found permanently to your Favorites.** You can save items for future use.
- **Access external licensed resources.** 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

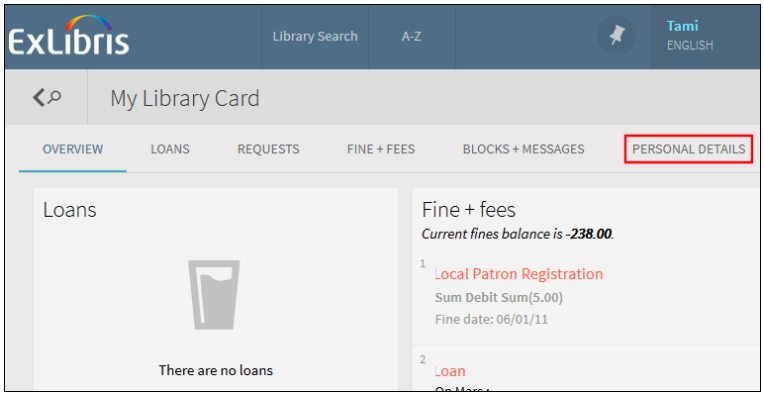
My Library Card enables you to view the contents of your library card and perform library services, such as renewing a book or canceling a request. In addition, it lets you define your personal Primo settings. To access My Library Card, place your cursor over the **Sign-In** area at the top of any page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

Return to menu

The My Favorites page, which is accessed by clicking the My Favorites button

at the top of each page, contains the following tabs:

- **Saved Records** – This tab displays all of your saved records and allows you to manage your saved records.
- **Saved Searches** – This tab displays all of your saved searches and allows you to manage your saved searches. In addition, it lets you set up alerts and RSS feeds, which let you know when results have changed for saved searches.
- **Search History** – This tab displays all of your searches for the current session and allows you to manage your current session's searches.

Saving and Managing Records

Primo allows signed-in users to save found records for subsequent sessions. After a record has been saved, the My Favorites > Saved Records page allows users to perform the following operations on saved records: view, delete, and label. Labels allow you to group and manage similar records.

Note

For guest users, records are saved in local memory and are not retained between browser sessions.

Saving a Record

To save a record:

1. Perform a search.
2. Click the Pin button

   next to the item that you want to save 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.

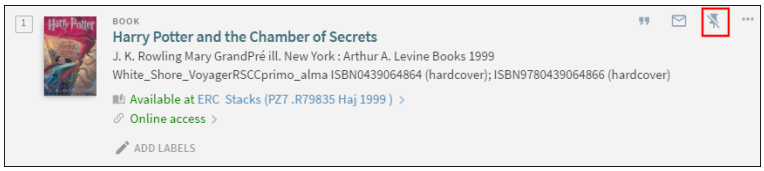
Removing a Record

To remove a record from My Favorites:

You can click the Unpin button

next to the item either in the search results or on the My Favorites > Saved Records tab.

Remove from Search Results



Remove from Saved Records Tab

Labeling a Record

Labels allow you to group records in private lists so that you can access these records as needed in the future. You may assign multiple labels to a saved record if you want to include that record in multiple lists.

To add a record to a private list:

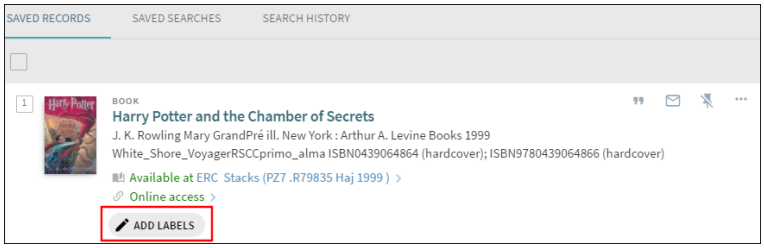
1. Click the My Favorites button

   that appears at the top of each page.

2. Select the Saved Records tab (if not selected already).

3. Click the Add Label button

   .

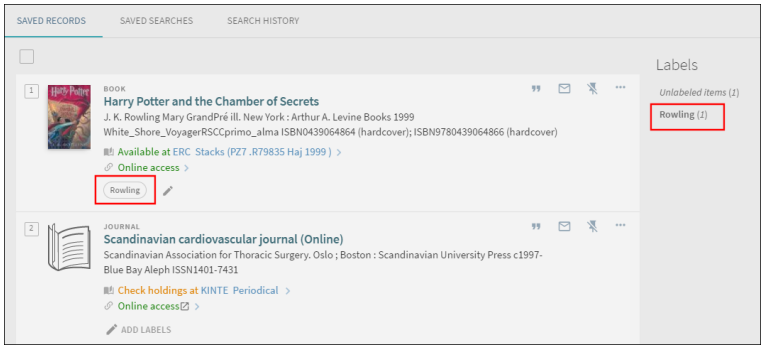


Add Label Button

4. Enter the name of the label.

Enter Label

The following figure shows an example of a label.



Example of Label

Removing a Label

To remove a label:

1. Click the My Favorites button

   that appears at the top of each page.

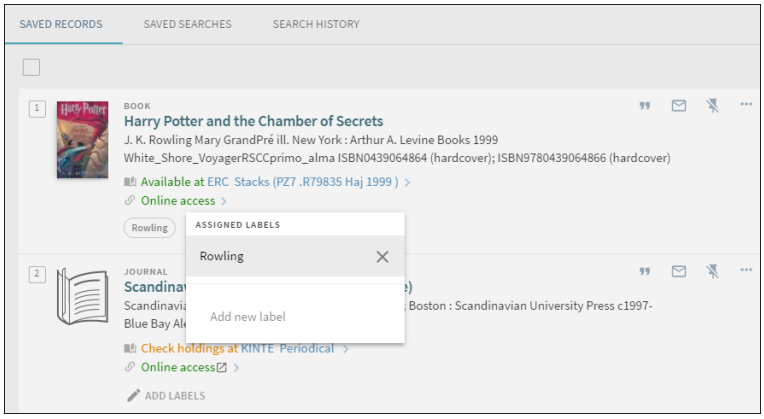
2. Select the Saved Records tab.

3. Click the record's Add Label button

   .

4. Click the Delete Label button

   to remove the label.



Delete Label Button

Viewing Grouped Records

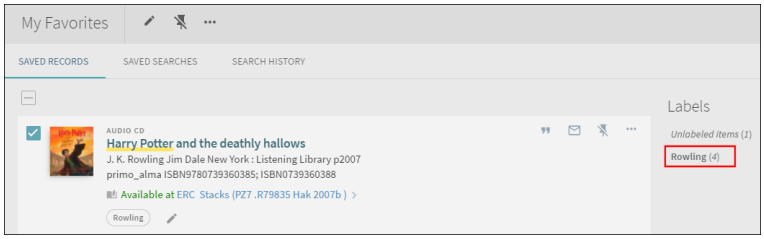
To view grouped records:

1. Click the My Favorites button

   that appears at the top of each page.

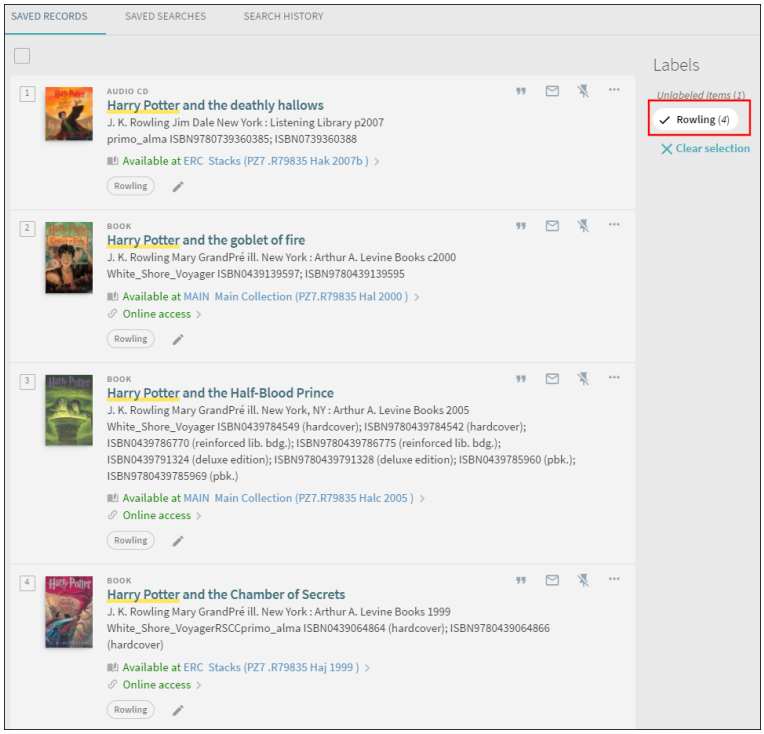
2. Select the Saved Records tab.

3. In the Labels section, click the label's link to view the records that have been assigned that label.



Selecting the Label Link

The following example shows the selected label and the list of items that have been assigned that label.



Example Grouping of Saved Records

Viewing a Saved Record

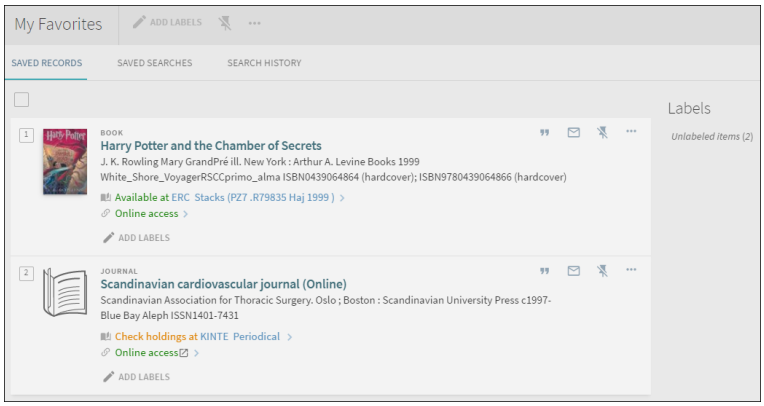
To view a saved record:

1. Click the My Favorites button

   that appears at the top of each page.

2. Select the Saved Records tab (if not selected already).

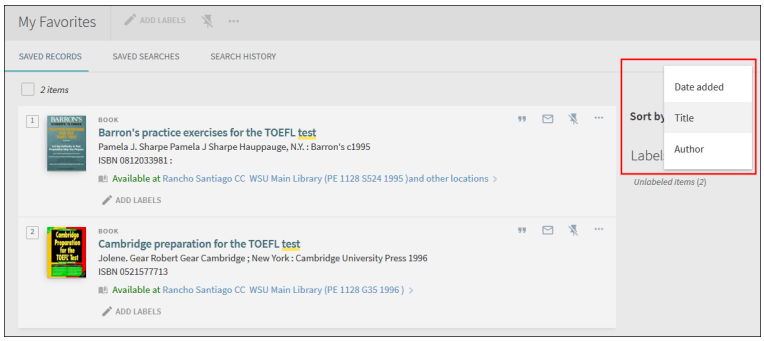
3. In the list of saved records, click the record that you want to display.



Saved Records Tab

Sorting the List of Saved Records

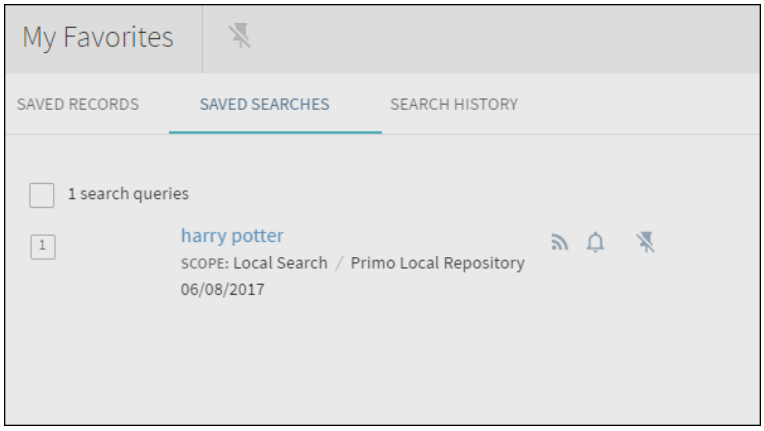
The following **Sort by** options allow users to sort their list of saved records to locate specific records: **Title**, **Author**, and **Date added**.



Saved Records - Sort Options on My Favorites Page

Saving and Managing Searches

Primo allows signed-in users to save searches between sessions and receive email alerts when there is an update to the saved search query. After a query has been saved, the My Favorites > Saved Searches page allows users to perform the following operations on saved searches: view, delete, create an RSS feed, and set/clear an alert.

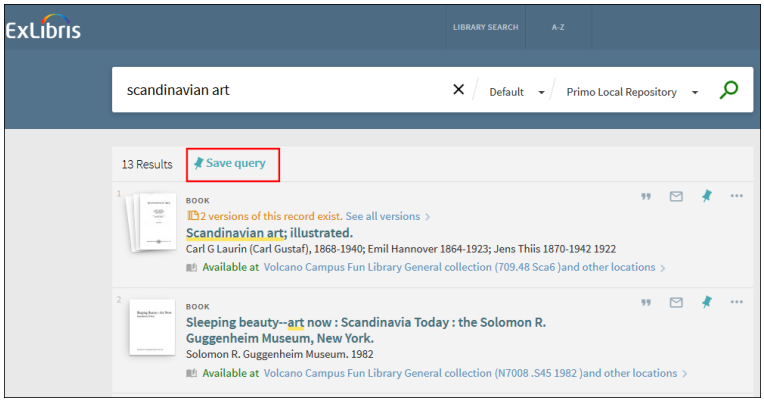


My Favorites - Saved Searches Tab

Saving a Query from the Results List

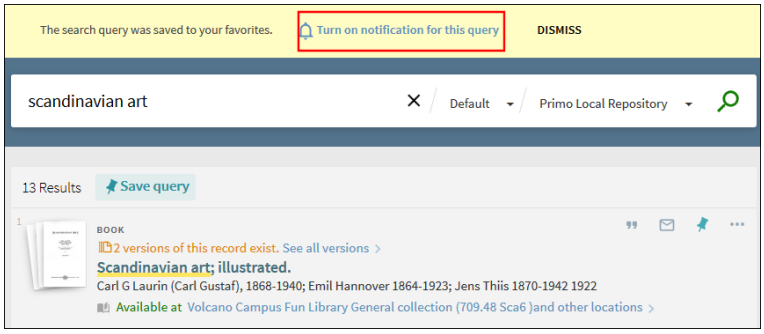
To save a query from the results list:

1. Perform a search that you want to save.
2. Click **Save Query**, which appears above the search results.



Save Query Link

In addition, you will have an opportunity to set an alert for this query by clicking the notification link that appears above the search box (see Setting an Alert for more details):



Set Alert Notification Link

Saving a Query from My Favorites

To save a query from the Search History tab:

1. Click the My Favorites button at the top of the page.
2. Select the Search History tab to display your current session's search history.
3. Click the Pin button that appears next to the query that you want to save. The record should now appear under the Saved Searches tab as well.

Deleting a Saved Query

To delete a query:

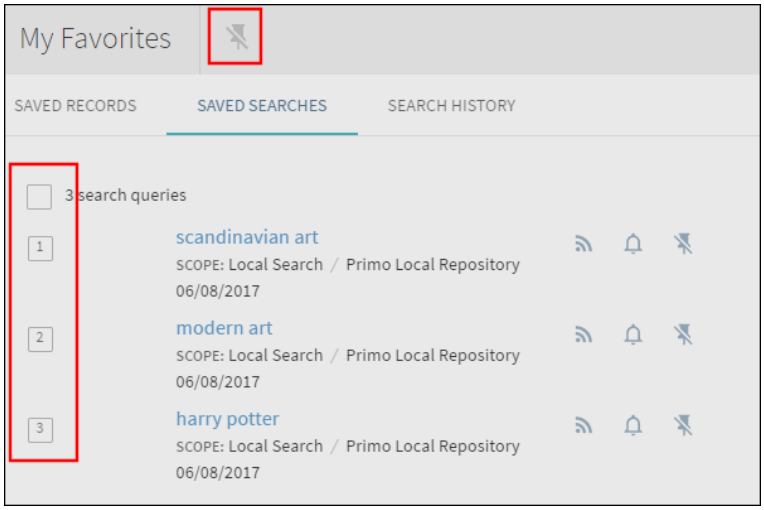
1. Click the My Favorites button at the top of the page.
2. Select the Saved Searches tab to display all of your saved searches.
3. Click the Unpin button that appears next to the query that you want to remove from the list.

Deleting a Query

Deleting a Group of Saved Queries

To delete a group of queries:

1. Click the My Favorites button at the top of the page.
2. Select the Saved Searches tab to display all of your saved searches.
3. Select the check boxes of the queries that you want to delete.



Select Queries to Remove

Note

To select all queries, click the check box above the list.

---

4. Click the Unpin button that appears above the list.

Saving and Managing Alerts

Primo allows signed-in users to receive email alerts when there is an update to the saved search query. After an alert has been set, the My Favorites > Saved Searches page allows users to perform the following operations on alerts: set/clear an alert and update email addresses.

Setting an Alert

To set an alert:

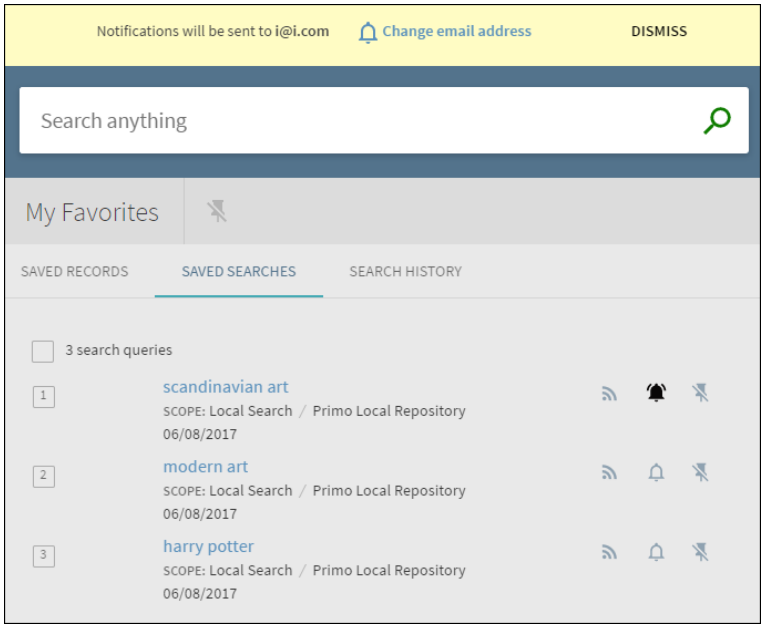
1. Click the My Favorites button at the top of the page.
2. Select the Saved Searches tab to display all of your saved searches.
3. Click the Set Alert button

   that appears next to the query to set the alert.

Set Alert Button

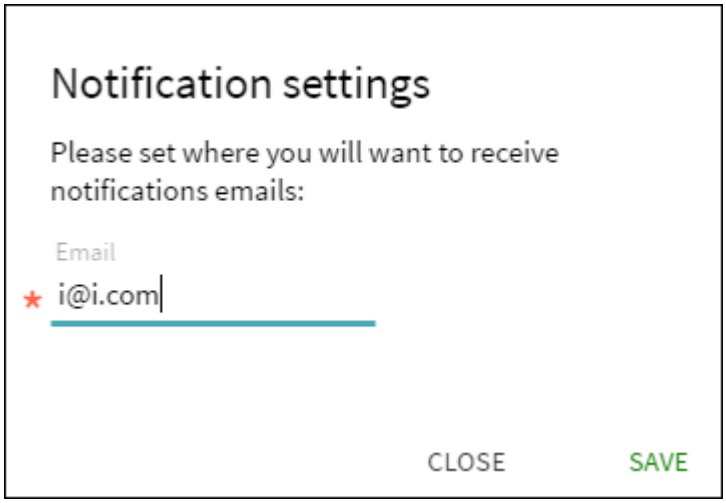
4. If necessary, update the email address to which the alert is sent. If the alert had not been previously set, the address defaults to the value stored in the user's personal settings.

   1. Click the **Change email address** link above the search box.



Change Email Address Link

   2. Modify the email address and then click **SAVE**.



Notification Settings Dialog Box

Clearing an Alert

To clear an alert:

1. Click the My Favorites button at the top of the page.
2. Select the Saved Searches tab to display all of your saved searches.
3. Click the Clear Alert button

   that appears next to the query to clear the alert.

Clear Alert Button

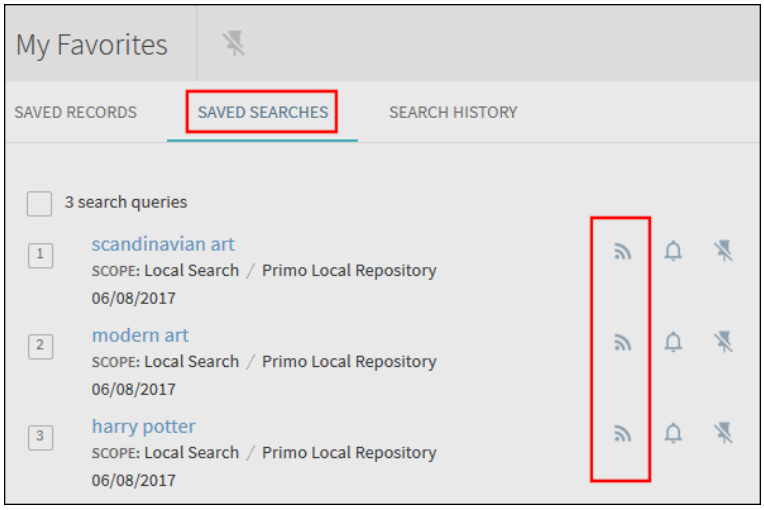
Creating an RSS Feed

The Rich Site Summary (RSS) functionality allows Primo users to be informed of changes to results in their saved searches.

To enable RSS for a saved search:

1. Open the My Favorites page by clicking the My Favorites button

   on the top menu of any page.
2. On the My Favorites page, click the **Saved Searches** tab.



RSS Selection on Saved Searches Tab

3. Click the RSS button

   for the saved search that you want to monitor.

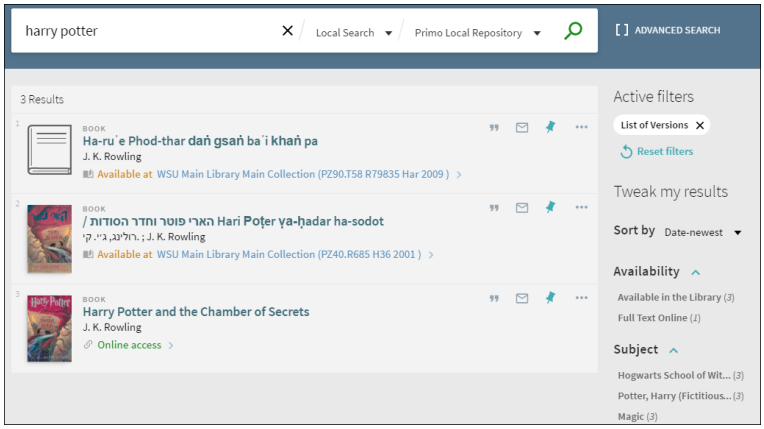
4. Subscribe to the feed if your browser has an RSS reader.

Using the Brief Results

Return to menu

The Brief Results page 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 Full Display Page).
- 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.



Brief Results

Personalizing the Results

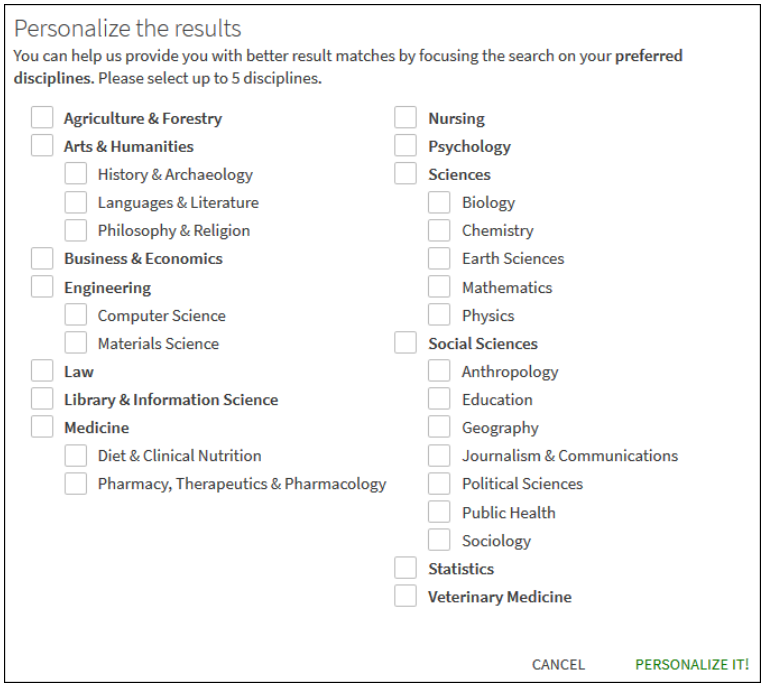
Personalized settings allow users to boost the rankings of electronic records that match their preferred disciplines.

Personalized Results Enabled in the New UI

The Personalized results section lists the active preferences and allows users to remove selected disciplines, edit selected disciplines, and give preference to newer material.

Setting the Personalized Results Preferences

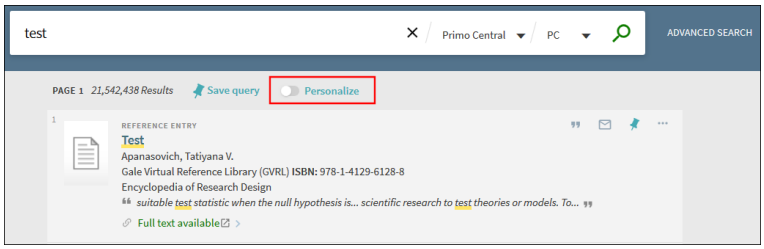
The Personalize the Results dialog box allows users to set their discipline preferences, which are retained during the session for guests and unsigned users and between sessions for signed-in users.



Personalize the Results Dialog Box

To enable personalized settings:

1. Perform a search within a search scope that includes Primo Central records.

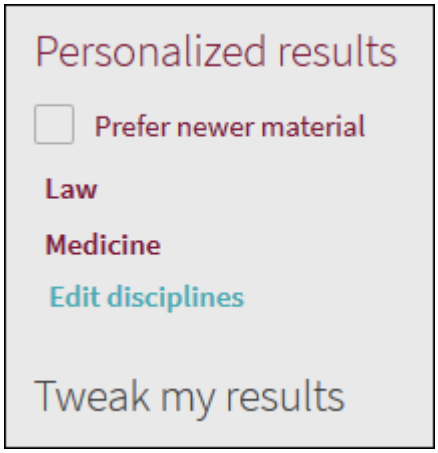


Enable Personalized Results

2. Click the **Personalize** button that appears above the list of results.
3. In the Personalize the results dialog box, select up to five disciplines.
4. Click **PERSONALIZE IT**.

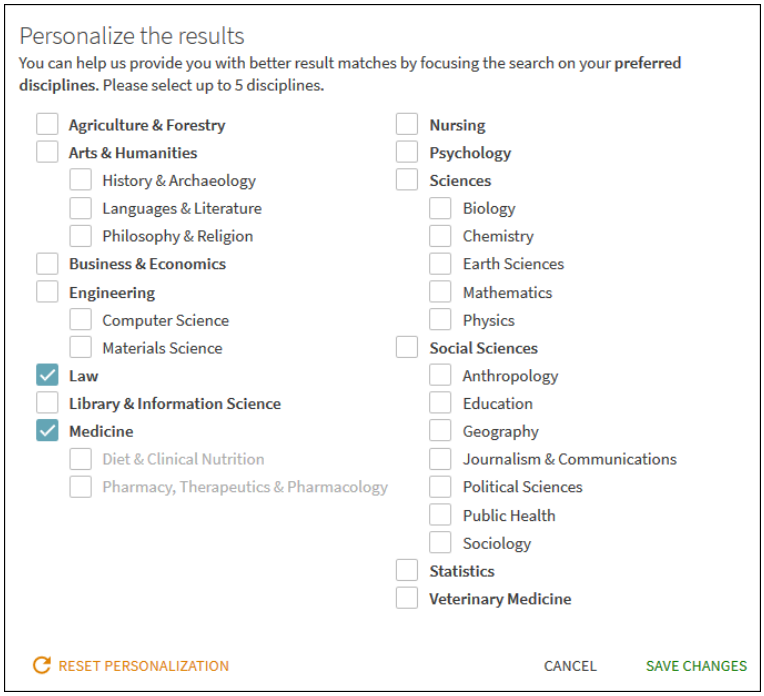
To edit personalized settings in the new UI:

1. Perform a search within a search scope that includes Primo Central records to display the Personalized results section.



Personalized Results Section

2. If you want to give preference to newer records, select the **Prefer new material** check box.
3. Click **Edit** in the Personalize the results section to open the Personalize the results dialog box.



Personalize the Results Dialog Box

4. In the Personalize the results dialog box, select up to five disciplines.
5. Click **SAVE CHANGES**.

Filtering the Results

The Tweak my results section, which may appear on either the right or left side of the Brief Results page, contains a list of categories, which are referred to as facets. By including and excluding these facets (such as date, author, record type, and so forth), you can narrow the search results to get the results you are seeking.

Including and Excluding Multiple Facets

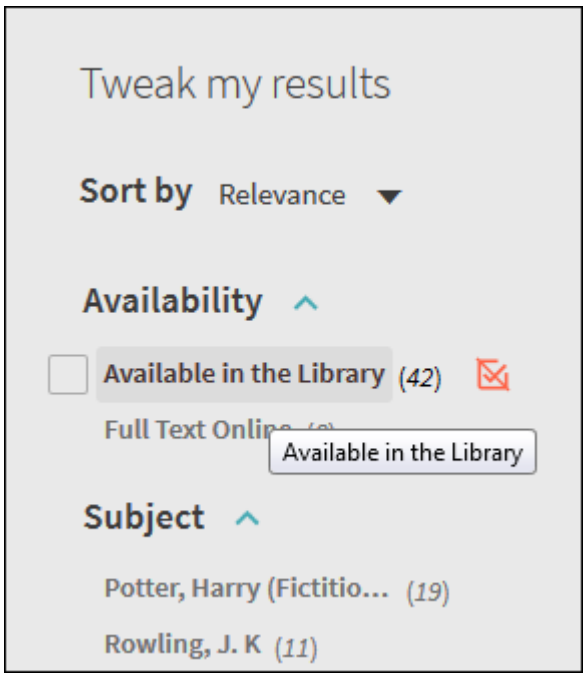
When facets are added one at a time, the system returns the remaining results that match the selected facet value. You can specify more complex filtering if you select multiple facets and then apply them to the results at the same time. For example, if you select Subject facet values **Agriculture** and **Botany** and Resource Type facet values **Book** and **Other**, the system returns results that include all records that match the following criteria:

- The records must contain either **Agriculture** or **Botany** subjects.
- And the records must be either **Book** or **Other** resource types.

If you had selected these facet values separately, the resulting records would have to contain all of these facet values.

To include/exclude multiple facets at a time:

1. Perform a search.



Tweak My Results Section on the Brief Results Page

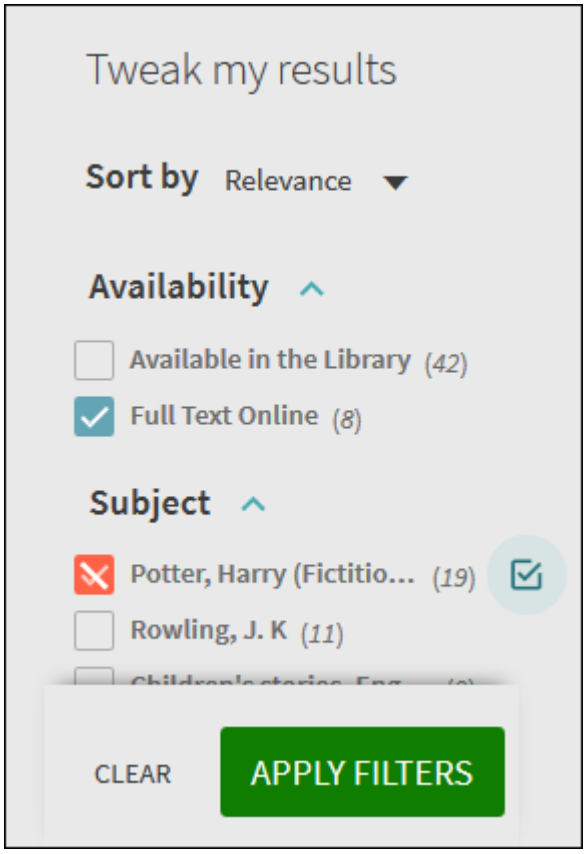
2. For each facet that you want to include and exclude, hover over the facet in the Tweak my results section of the UI and then perform one of the following actions:
   - Include facet – Select the check box on the left side of the facet. If you want to include a facet that has already been marked for exclusion, click the

     button on the right side of the facet.
   - Exclude facet – If you have already included a facet, click the

     button on the right side of the facet to mark it for exclusion. If you have not already marked a facet for exclusion or inclusion, you must first select the facet's check box and the click the

button on the right side of the facet. Otherwise, a single facet will be excluded immediately.

3. Click **Apply Filters** to filter your results. The selected facets will appear in the Active filters section.



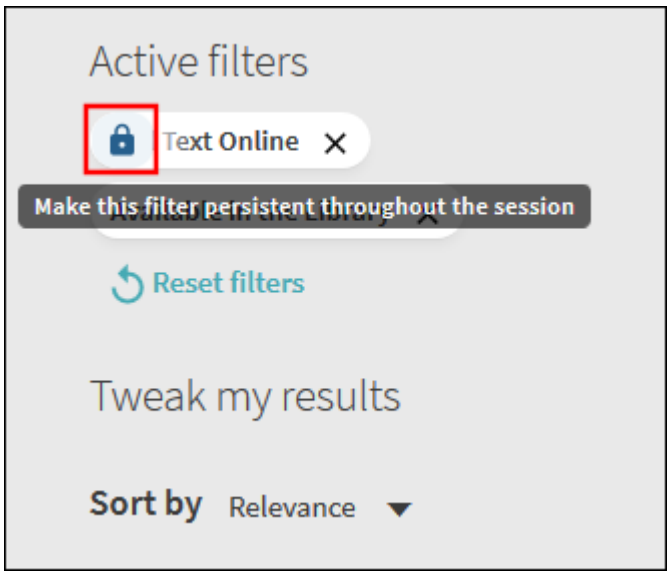
Active Filters Section

Adding Persistent Facets

When performing many similar types of searches, you may want to retain your filters for subsequent searches within a session.

To make a facet persistent, hover the cursor over the facet in the Active filters section and then click the facet's padlock

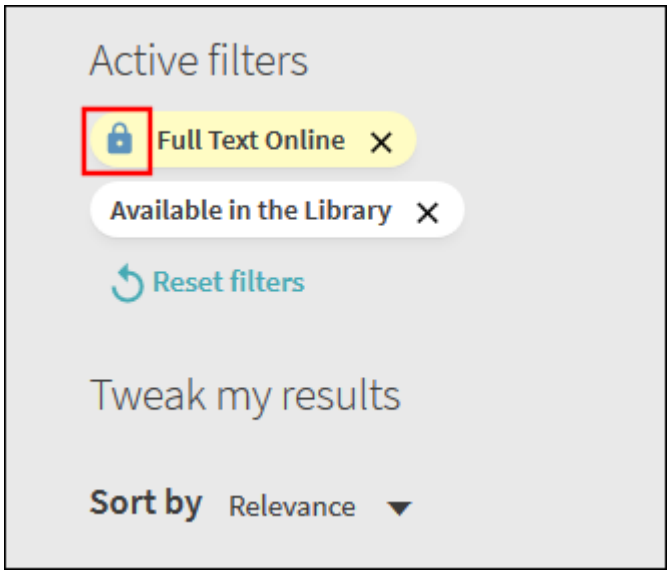
.



Add Sticky Facet

To remove a facet's persistence, click the facet's padlock

or delete the facet.

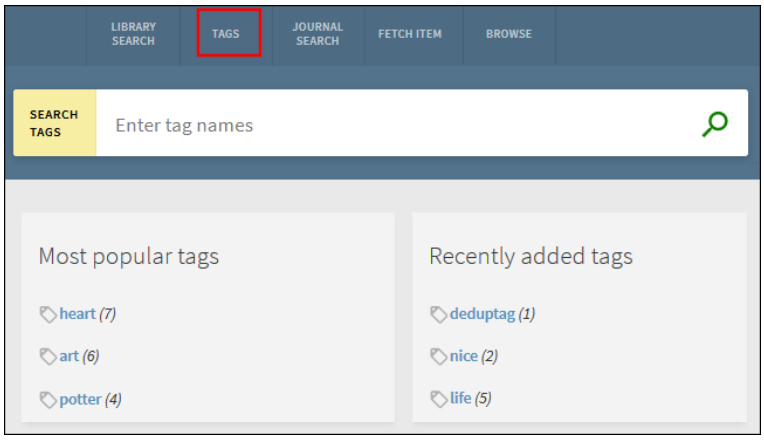


Remove Sticky Facet

Tagging Search Results

Return to menu

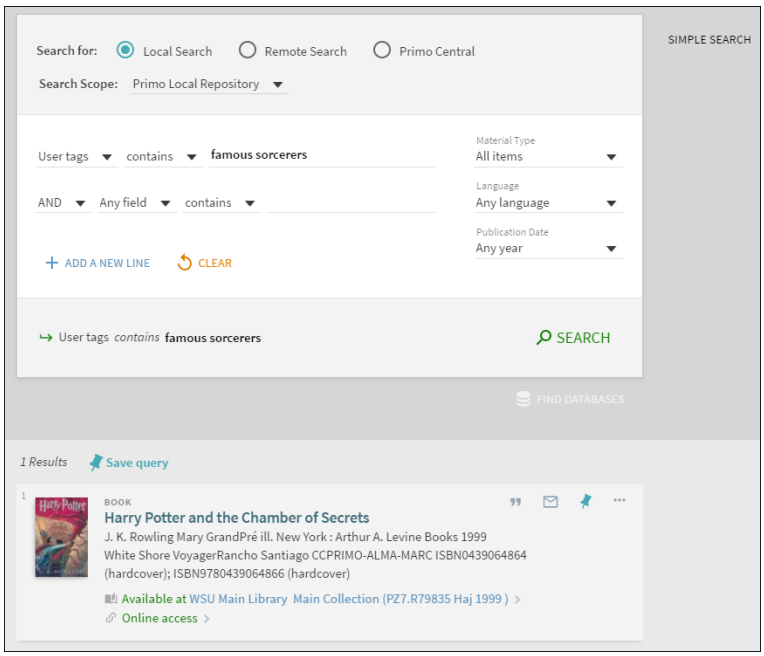
Tags are words or phrases that you can assign to items to help you organize and remember them. Because tags are shared with the community, users can see the tags that are assigned to items by other users. You can assign as many tags to an item as you want. In addition, the tags that you create and assign to items appear to all users on the Tags page.



Tags Page

From this page, users can search for tags, view the most popular and recently added tags, and display the list of records that have been tagged. The numbers in parentheses beside the tag names indicate how many records have been marked with the tag.

Clicking the tag name in the Tag results, opens the results page, which displays a filled-out Advanced Search box and the list of tagged items. Users can then modify the search to find additional records. In the following example, only a single record had been tagged:



Results List for a Tag

Adding a Tag to an Item

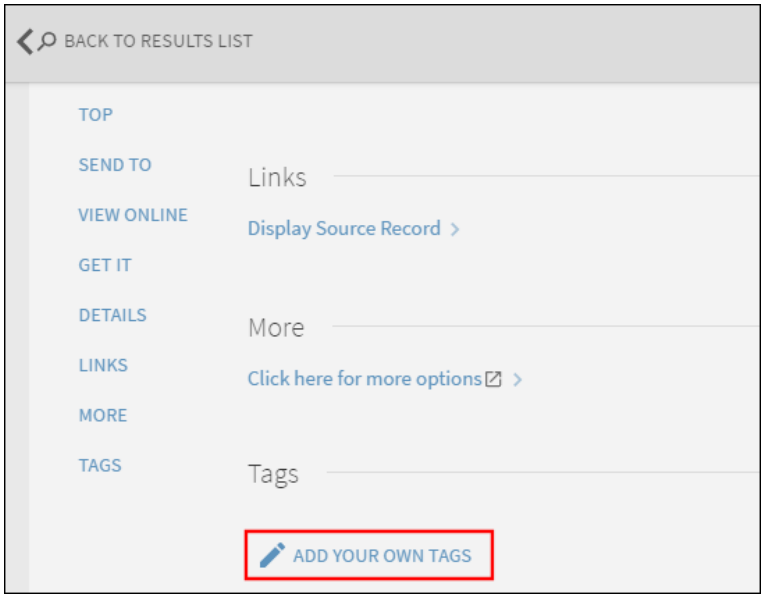
All users can view tags and their lists, but only signed-in users can create tags.

Note

After an item is tagged, it will be searchable via the tag in approximately 10 minutes.

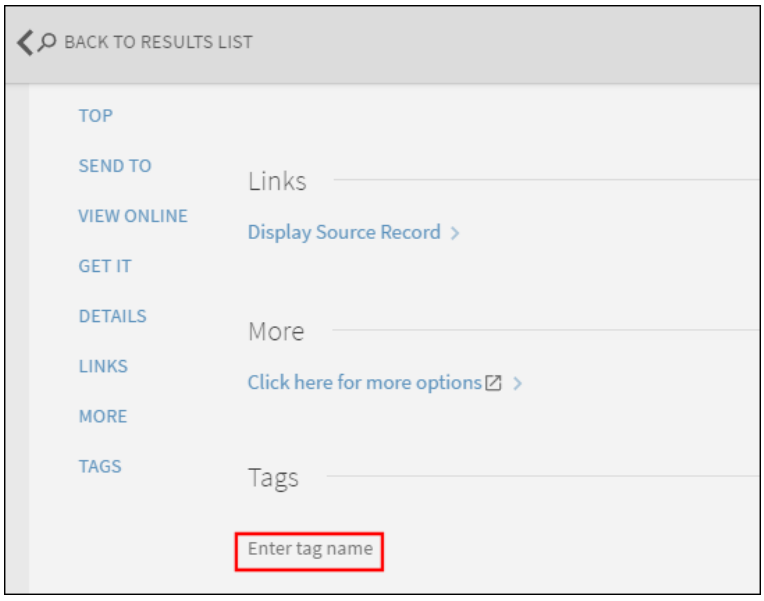
To add a tag:

1. Perform a search for a record.
2. Open the record's full display page.



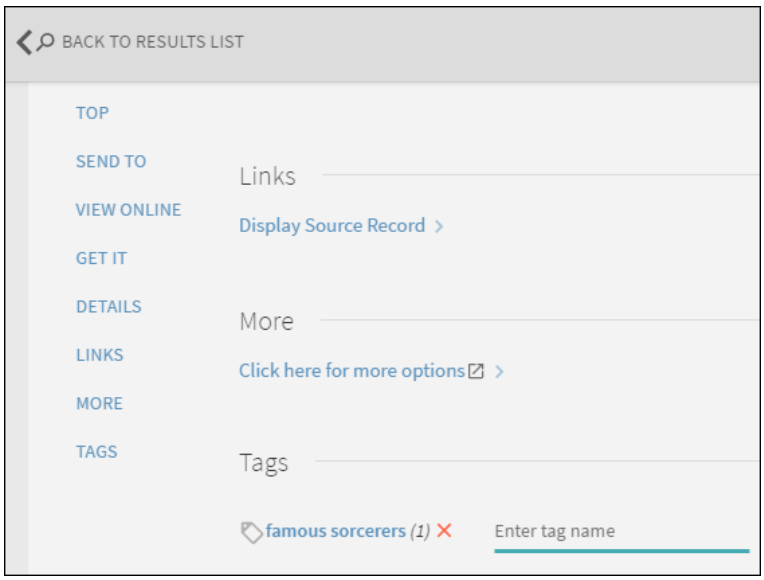
Tags Section on Full Display Page

3. In the Tags section, click **ADD YOUR OWN TAGS**.



Enter Tag Name

4. Type the name of the tag on the line and press **[RETURN]**.



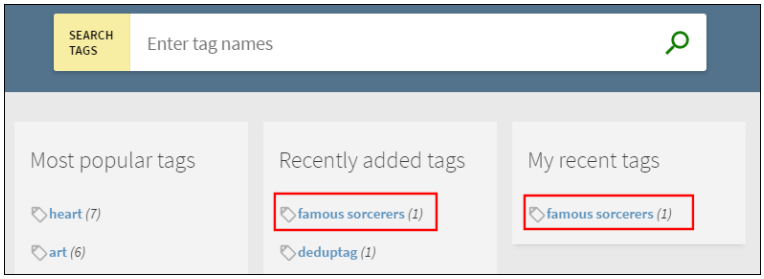
New Tag Added

Deleting a Tag from an Item

Users can delete only their own tags.

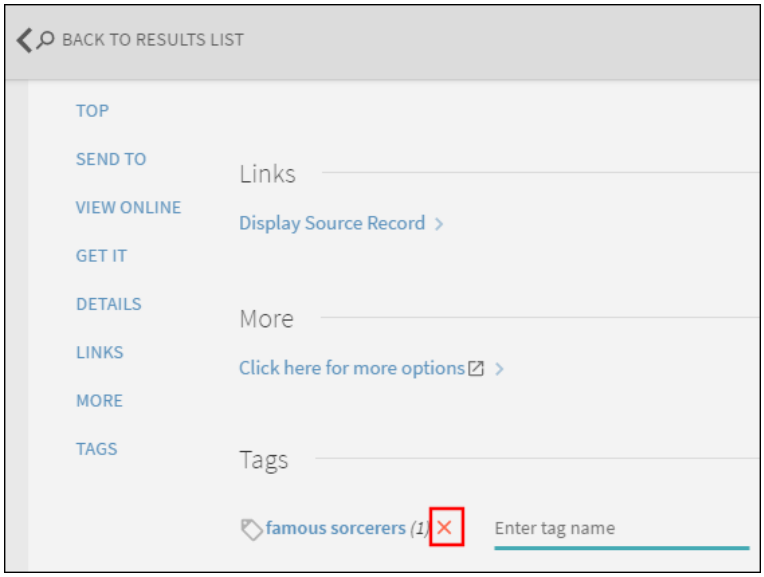
To delete a tag:

1. On the Tags page, click the tag that you want to edit.



Find Tag to Delete

2. On the results page, open the record's full display.



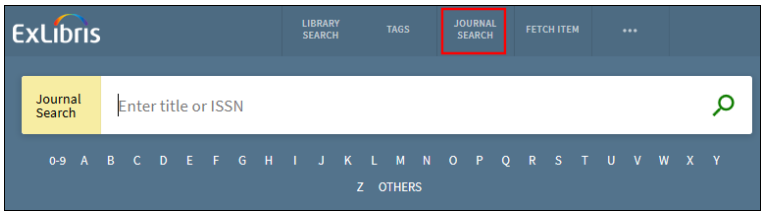
Delete Record's Tag

3. In the Tags section, click the **X** next to the tag that you want to remove.

Searching Journals in Alma

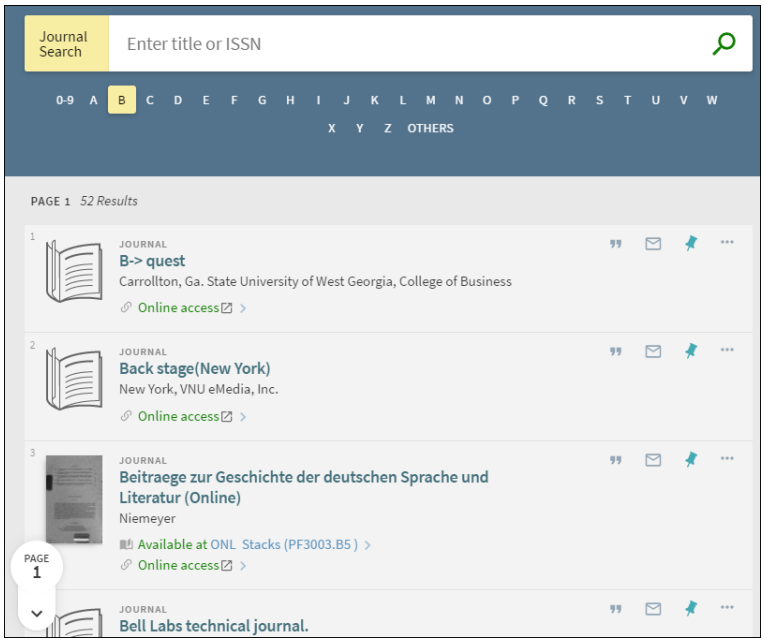
Return to menu

Alma Journal Search, which is also known as the A-Z List in the classic Primo UI, allows users to search for journals by title or ISSN or to browse for journals that start with either any number (0-9), a specific letter (A-Z), or all other non-Latin characters (OTHERS).



Alma Journal Search

The number of results per page is 20 (not configurable), and each result contains the following information: resource type, thumbnail, title, publisher, date, availability, and actions (such as Citation and Email).



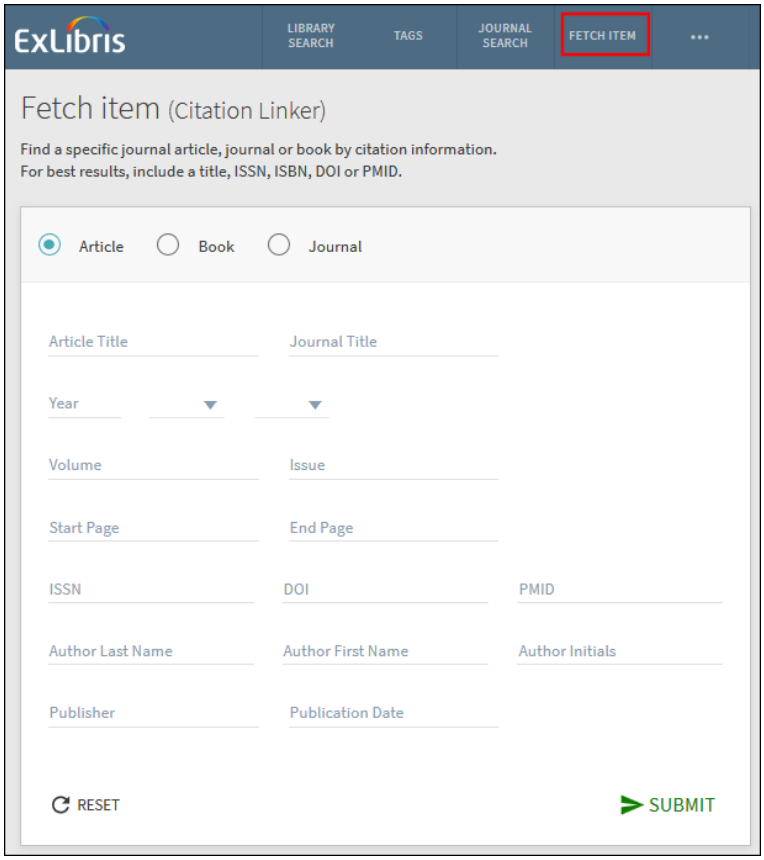
Journal Search Results Page

Using Fetch Item

Return to menu

Fetch Item does not search for records in the same way as a regular Primo search, which may return many results. Instead, it allows you to specify metadata (such as a title, ISBN, ISSN, and so forth) for a specific book, article, or journal to retrieve the item's available services (such as full text or ILL). Because the link resolver returns services based on its own information, it may also return services that are not indexed in your institution's catalog. In addition, the link resolver may offer other services (such as to purchase or request items that your library does not hold).

The Fetch Item page provides a tab for books, journals, and articles so that you can specify search criteria (such as volume, author, and so forth) for the selected citation type.

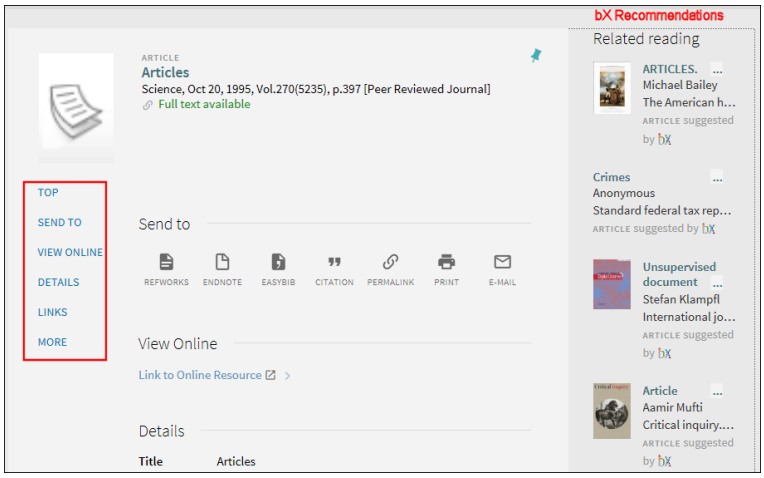


Fetch Item Page - Article Tab

Using the Full Display

Return to menu

After selecting an item in the Brief Results, the record's Full Display opens to display additional information. Users can either scroll to a particular section or use the links shown on the left side of the page.



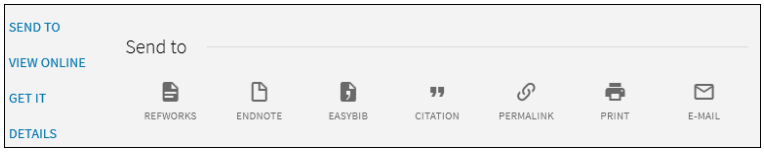
Full Display Page

Note

The bX recommendations now appear on the right side of the Full Display.

The item's information is organized by the following sections:

- **Send To** – This section allows users to perform the following actions on the selected item: email item details, create a citation, print, send to reference management service (such as RefWorks), and create a permalink.

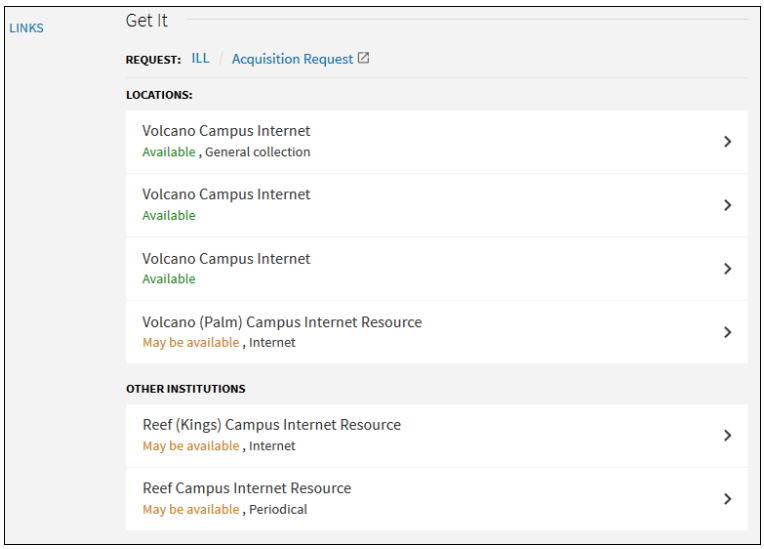


Send To Section

- **View Online** – This section appears only if the item is available for online viewing.

View Online Section

- **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 section will link to your institution to perform requests.

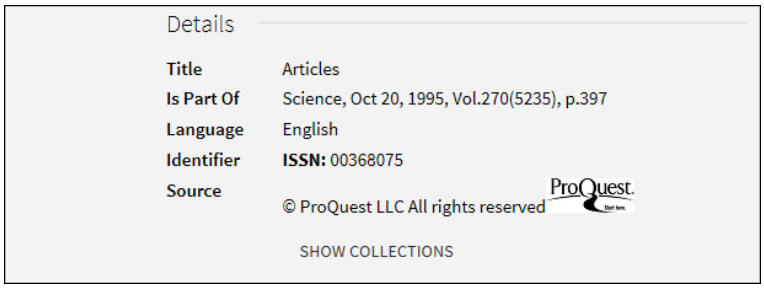


Get It Section

Note

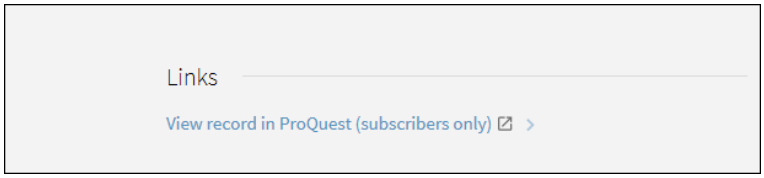
You may have to sign in to Primo or your institution to make a request.

- **Details** – This section displays additional details (such as the publisher and creation date) to help the user decide whether to choose this item.



Details Section

- **Links** – This section displays additional links, which may allow you to view cover art, the Table of Contents, and so forth.



Links Section

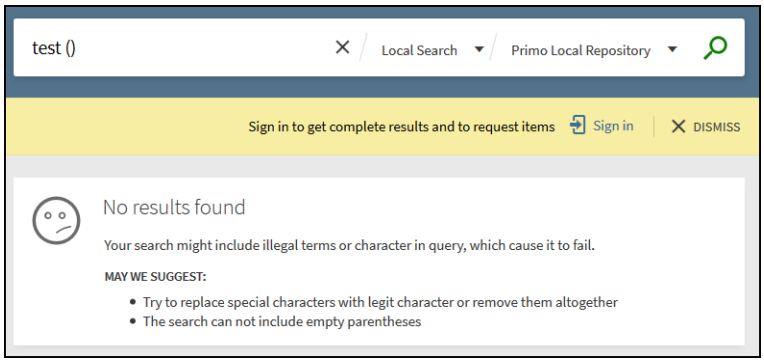
- **More** – This section displays links to full text services for journals, such as provided by the SFX link resolver.

More Section

Feedback Messages

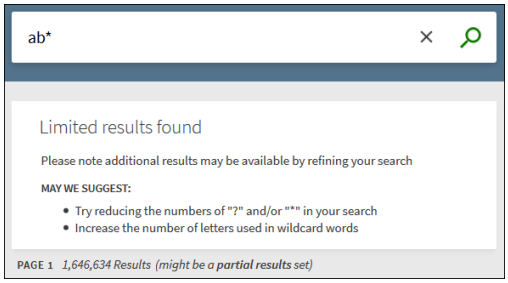
Return to menu

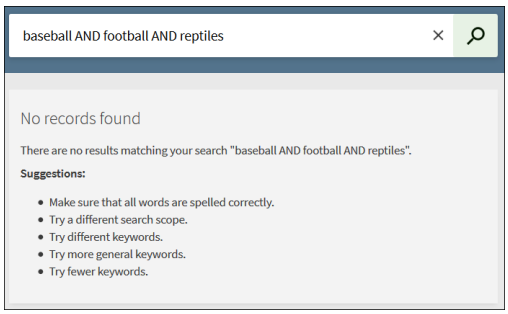
Primo provides informational messages to indicate when system limits have been reached or when search queries are too broad or to narrow to return effective results. This feedback is meant to help users improve their search queries so that they can find materials more effectively.

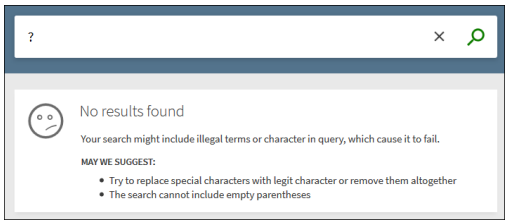


Example Feedback Message

The following table lists the types of feedback messages that the system can return.

Message	Description
Limited results found. Due to a temporary technical problem, the result list may be incomplete. Please try again soon.	Because the following system issues may cause incomplete results to be returned, you may need to your search again later: • A search engine slice is down temporarily. • Primo Central is down temporarily.
Limited results found. Please note additional results may be available by refining your search. 	Partial results were be returned because the use of a wildcard in the search query was too general. **May We Suggest**: 1. Try reducing the numbers of "?" and/or "*" in your search. 2. Increase the number of letters used in wildcard words.
No records found.	No results were found using your search query. **Suggestions**:

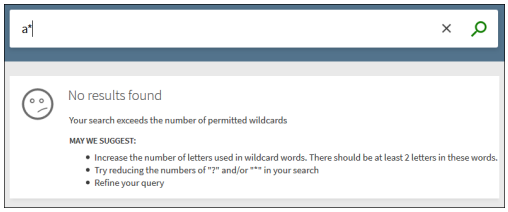
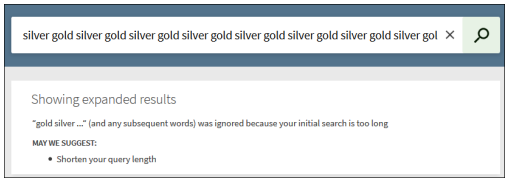
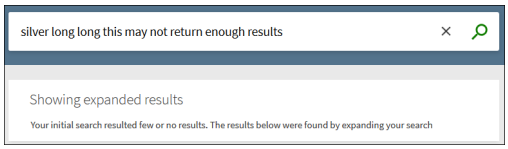
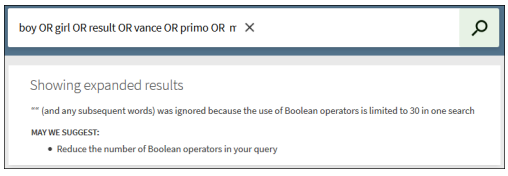
<table>
<tr><th>Message</th><th>Description</th></tr>
<tr><td>There are no results matching your search "{{term}}".
 
</td><td>1. Make sure that all words are spelled correctly.
2. Try a different search scope.
3. Try different keywords.
4. Try more general keywords.
5. Try fewer keywords.</td></tr>
<tr><td>No results found.

Your search might include illegal terms or character in query, which cause it to fail.
 
</td><td>No results may be returned because your search query contained illegal terms or characters. This is not an exhaustive list, but the following special characters may return this feedback message:
<table><tr><th>Characters</th><th>Description</th></tr><tr><td>?, *, ", (,), &&, (), and ;</td><td>These characters cannot be entered separately to form the entire search query. For example: &&</td></tr><tr><td>? and *</td><td>These characters cannot be entered separately to form an entire search term. For example: boy ? girl</td></tr><tr><td>? and *</td><td>These characters cannot be entered as the first character in a search term. For example: ?boy</td></tr><tr><td>()</td><td>Open parentheses cannot be entered anywhere in a search query. For example: function()</td></tr><tr><td>&&</td><td>These characters cannot be entered together without leading and trailing terms with letters. For example: boy &&

The following query is acceptable: boy && girl.</td></tr></table>
May We Suggest:
1. Try to replace special characters with legit characters or remove them altogether.
2. The search cannot include empty parentheses.</td></tr>
<tr><td>No results found.

Your search exceeds the number of permitted wildcards.</td><td>No results were returned because your search query included too many wildcard characters (such as * and ?). For information on system limits, see Search Limits.

May We Suggest:</td></tr>
</table>

Message	Description
	1. Increase the number of letters used in wildcard terms. There should be at least 2 letters in these words. 2. Try reducing the numbers of "?" and/or "*" in your search. 3. Refine your query.
Showing expanded results. "{0}" (and any subsequent words) was ignored because your initial search is too long. 	Because your query was too long, the system returned partial results based on the truncation of the original search query. **May We Suggest**: Shorten your query length.
Showing expanded results. Your initial search resulted in few or no results. The results below were found by expanding your search. 	Your search query was expanded because it returned few or no results initially.
Showing expanded results. "{0}" (and any subsequent words) was ignored because the use of Boolean operators is limited to {1} in one search. 	Because the search query had too many boolean operators, the system returned partial results based on the truncation of the original search query. For information on system limits, see Search Limits. **May We Suggest**: Reduce the number of Boolean operators in your query.

New UI Customization - Best Practices

Introduction

In order to provide users with the best experience in Primo discovery, Ex Libris carried out an extensive user study that included the following tasks to help redesign the Primo user interface:

- Analyzed search logs
- Conducted surveys of librarians during workshops
- Interviewed users at different academic levels and from various countries and disciplines

During the design and development of the new interface, accessibility was tested as well as its responsiveness on several devices to make sure that the new design met the goals based on the results of the user study.

Because every library has its own needs and brand, we have implemented a new customization framework that allows customers to tap into predefined hooks for each UI component, thus allowing them to customize each component as needed.

In order to ensure a quality user experience and optimal system performance, we encourage customers to test every change that they make for both accessibility and responsiveness in their staging environments before uploading any packages to their production environment.

Additional Resources

The following resources may be helpful in the customization of the new Primo UI:

- Learn how to use js directives: https://github.com/ExLibrisGroup/primo-explore-package/tree/master/VIEW_CODE/js
- All source code used for existing customer widgets: https://github.com/search?utf8=%E2%9C%93&q=primo-explore
- All feature packages that customers have created: https://www.npmjs.com/search?q=primo-explore&page=2&ranking=optimal

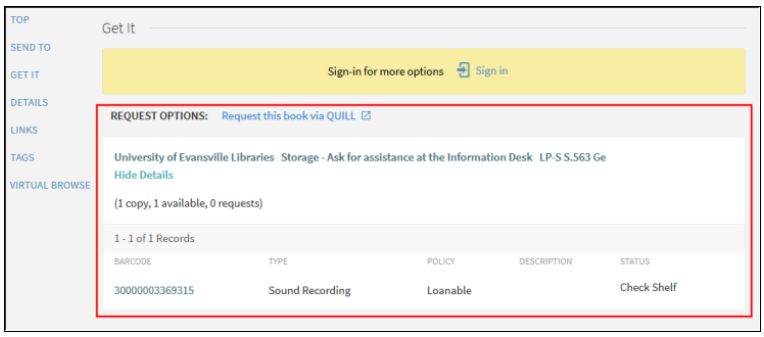
Inspecting Web Elements with Your Browser

Most Web browsers provide developer tools that allow you to inspect the currently-loaded HTML and find specific elements on a page. In most browsers, you can either click F12 or right-click the page and then select the **Inspect Element** option.

Note

In order to customize the new UI, you should be familiar with the following: CSS, HTML, JavaScript, and AngularJS. Depending on your experience with each of these languages and frameworks, you will be able to perform more complex customizations.

For Alma-Primo configurations, the labels and CSS inside the View It and Get It sections on the Full Display page are controlled by Alma, not Primo. For more details, see Modifying Display Labels and Branding the Delivery Tabs.

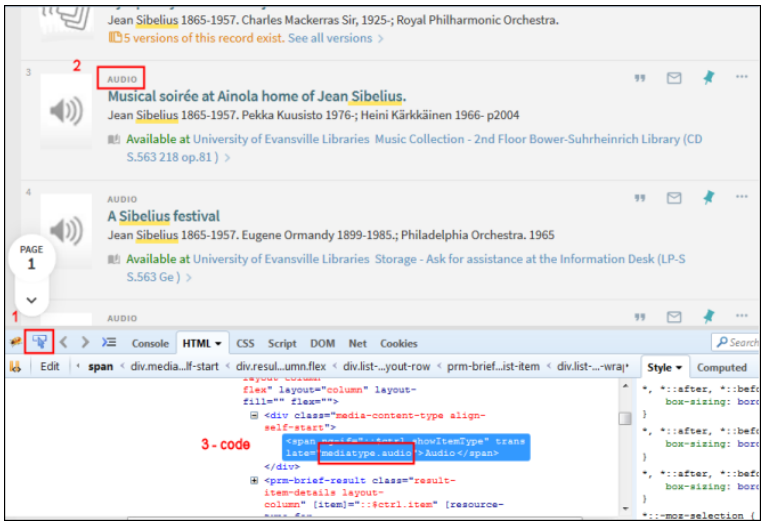


Full Display Page - Get It Section

The following procedure shows how to use the browser's inspect tool to locate the code table used to define a label in the new UI.

To locate a label on the page:

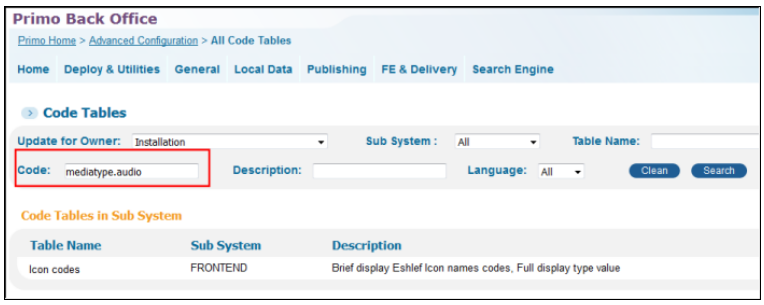
1. On the page that you want to inspect, press **F12**.
2. Click the inspect item button (#1) and then click the label (#2) that you want to modify. Each component should highlight as you move the cursor over the item.



Inspection Brief Results Page

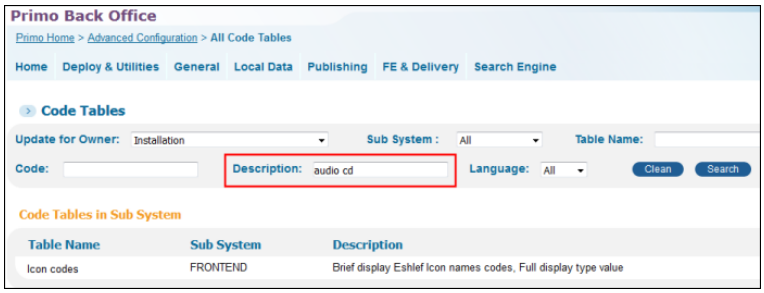
3. In the HTML tab, you should see the label and its corresponding code (#3). If you don't see a **translate** parameter, you can instead search for the label's description on the All Code Tables page.
4. On the All Code Tables page in the Back Office (**Primo Home > Advanced Configuration Wizard > All Code Tables**), either search for the code or description (the actual display label).

   The following figure shows and example of a search for a code:



Code Search Example

The following figure shows and example of a search for a code:



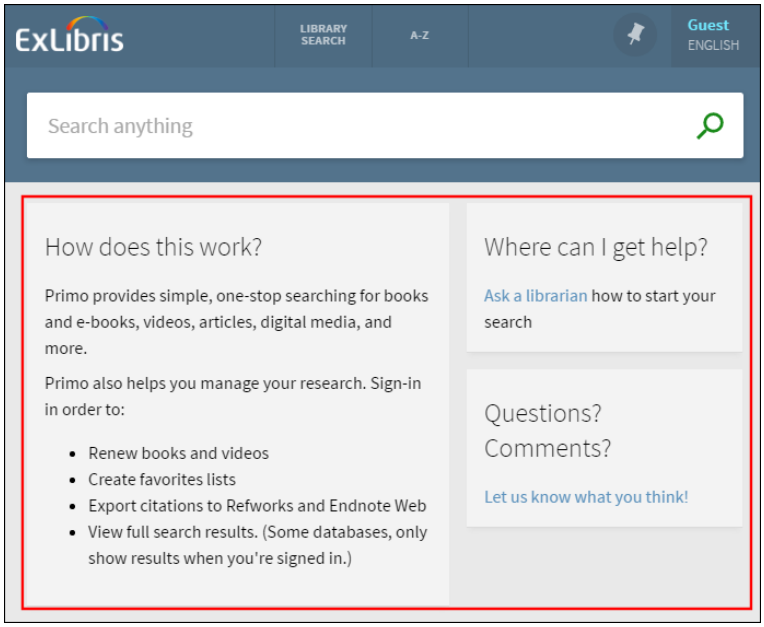
Label Search Example

Using the UI Customization Package Manager

The Customization Package Manager allows you to upload and manage customization packages, which allow you to brand and further customize the Primo UI. For more information on the tool, see UI Customization Package Manager.

To ensure that a customization package integrates properly with Primo, the package must contain the following folders:

- **css** – This folder contains the `custom1.css` file, which is where you can include your CSS rules. These rules will override corresponding rules in the default CSS.
- **img** – This folder contains all customized images for the new Primo UI. To ensure that the correct image appears in the Primo UI, make sure that you use the same file name as the original.
- **html** – This folder contains all customized HTML files for the new Primo UI. The `home_en_US.html` file allows you to customize the area of the page below the search box on the Primo Home page. For more information, see Home Page.



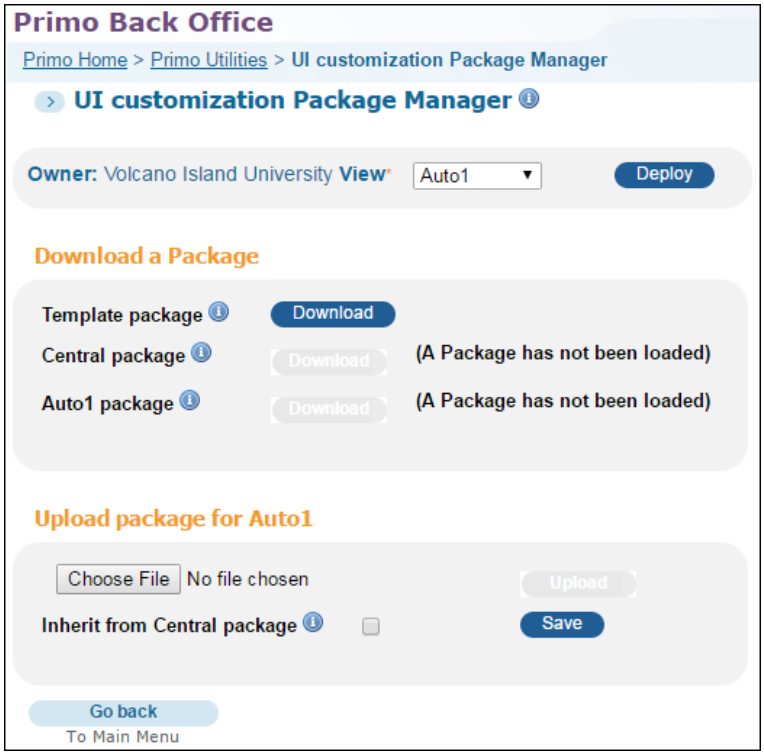
New Primo Home Page

Note

- The system will not use content inside `<script>` tags.
- Since this code will be nested inside the main HTML code, it is recommended to wrap this code with a `<div>` tag (insets of the `<html>` tag).
- To support other languages, you can create a new HTML file with the relevant language code and locale. For example: `home_fr_FR.html`.
- For details on configuring Alma's View It and Get It services, see Branding the Delivery Tabs.

To create a customization package:

1. Open the UI Customization Package Manager (**Primo Home > Primo Utilities > UI Customization Package Manager**).



2. Select the institution (on-premises configurations only) and the view that you want to customize.
3. Click **Download** to download the template package.

4. Unzip the ZIP file.
5. If using the template file, change the name of the root folder to your view's code.
6. Add your customized images and CSS. You must retain the file structure and names of files that you are overriding. Refer to the following sections for details on how to brand and make simple changes to your view:
   - Customizing Image Files
   - CSS Components and Customizations
7. Zip the Configuration package folder.

Note

To avoid upload errors, it is recommended that you use a compression tool such as **7zip** or **Winrar** instead of Windows **Send to > Compress folder**.

---

8. Open the UI Customization Package Manager (**Primo Home > Primo Utilities > UI Customization Package Manager**).
9. Select the institution (on-premises configurations only) and the view that you want to customize.
10. In the Upload package section, click **Choose File** to select the zipped package that you just created or modified for that view and institution.

11. Click **Upload** to upload your package to the server.

    Add image here...

13. Click **Deploy** to activate your changes in the Primo UI.

14. Refresh your view in the Web browser and test your changes prior to uploading the changes to the production server.

Customizing Image Files

Any of the out-of-the-box images can be customized by creating or modifying a view's package, placing the customized image under the `img` folder, uploading the updated package to the server, and then deploying the package. Here are some of the commonly customized images for the purpose of branding:

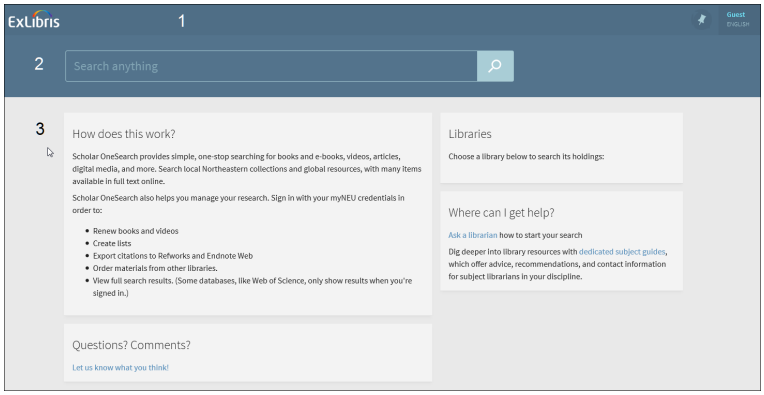
- `library-logo.png` – Contains the library logo.
- `favicon.ico` – Contains the favicon.
- `icon_<resource_type>.png` – Contains the image for the specified resource type `<resource_type>`. For example: `icon_audio.png`

CSS Components and Customizations

This section identifies the major CSS components for each page of the new UI and provides an example of how to move the facets to the left side of the page using CSS.

Home Page

This section identifies the major components of the Home page.



Home Page Components

1. `.prm-primary-bg.prm-hue1, prm-search-bar.prm-hue1, prm-spinner.prm-hue1.overlay-cover.light-on-dark:after, prm-topbar .top-nav-bar{}`
2. `.prm-primary-bg, prm-search-bar, prm-spinner.overlay-cover.light-on-dark:after{}`
3. `view_code/html/home_en_US.html`

Note

If you want to display drop-down lists for the view's default tab and search scope in the search box initially, include the **tab** parameter as follows in the new UI's URL:

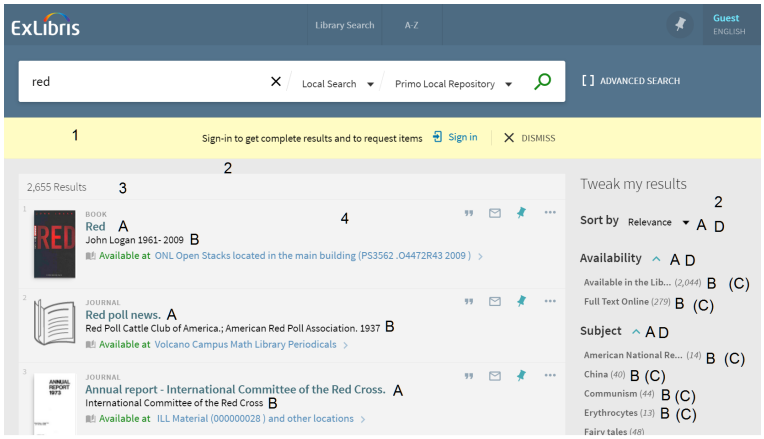
`http://<Primo_URL>/primo-explore/search?vid=<view_code>&tab=<default_tab_name>`

If you want to display a drop-down list for a specific search scope initially, include the **search_scope** parameter as follows in the new UI's URL:

`http://<Primo_URL>/primo-explore/search?vid=<view_code>&tab=<default_tab_name>&search_scope=<scope_name>`

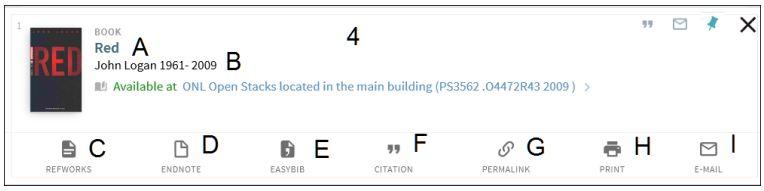
Brief Results Page

This section identifies the major components of the Brief Results page.



Brief Results Page Components

1. `.alert-bar{}`
2. `md-content, md-content.md-primoExplore-theme{}`
    1. `.section-title {}`
    2. `.section-content .md-chips .md-chip strong{}`
    3. `.md-autocomplete-suggestions .suggestion-scope, .text-italic{}`
    4. `.link-alt-color, .section-title prm-icon {}`
3. `prm-search-result-list .results-title {}`



Brief Result Item Components

4. `prm-brief-result-container .list-item-primary-content {}`
    1. `prm-brief-result .item-title{}`
    2. `prm-brief-result .item-detail{}`
    3. `.item-expanded .secondary-content-holder .md-tab:nth-child(2), .item-expanded .secondary-content-holder md-tab-item:nth-child(2){}`
    4. `.item-expanded .secondary-content-holder .md-tab:nth-child(3), .item-expanded .secondary-content-holder md-tab-item:nth-child(3) {}`
    5. `.item-expanded .secondary-content-holder .md-tab:nth-child(4), .item-expanded .secondary-content-holder md-tab-item:nth-child(4) {}`
    6. `.item-expanded .secondary-content-holder .md-tab:nth-child(5), .item-expanded .secondary-content-holder md-tab-item:nth-child(5) {}`
    7. `.item-expanded .secondary-content-holder .md-tab:nth-child(6), .item-expanded .secondary-content-holder md-tab-item:nth-child(6) {}`
    8. `.item-expanded .secondary-content-holder .md-tab:nth-child(7), .item-expanded .secondary-content-holder md-tab-item:nth-child(7) {}`
    9. `.item-expanded .secondary-content-holder .md-tab:nth-child(8), .item-expanded .secondary-content-holder md-tab-item:nth-child(8) {}`

Hiding the Sign-In Link

To hide the "Sign in to get complete results and to request items" link:

```
.alert-bar {

  display:none;

}
```

Changing the Color of the Versions Link

To change the color of the "See all versions" link:

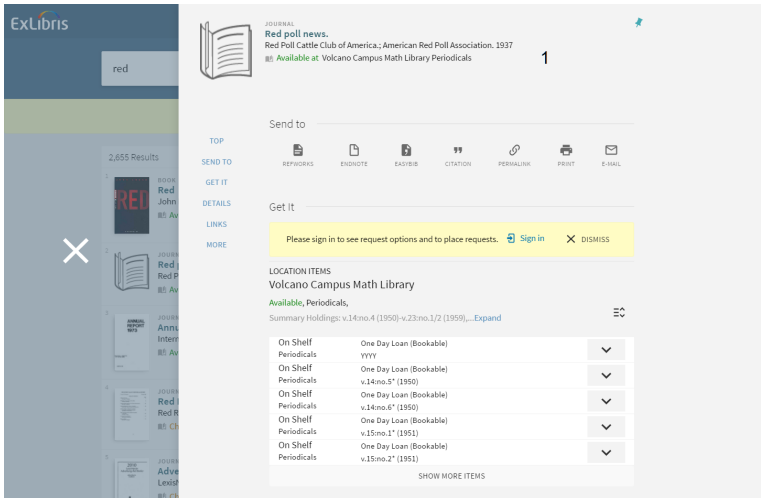
1. Log on to the Primo Back Office.
2. On the All Code Tables page (**Primo Home > Advanced Configuration Wizards > All Code Tables**), edit the **Results Tile** code table under the **Front End** subsystem.
3. Change the description of the **default.nui.frbrversion.found.link** code to the following:

   ```
   <font color="green">See all versions</font>
   ```

4. Save and deploy your changes.

Full Record Page

This section identifies the major components of the Full Record page. For details on configuring Alma's View It and Get It services, see Branding the Delivery Tabs.

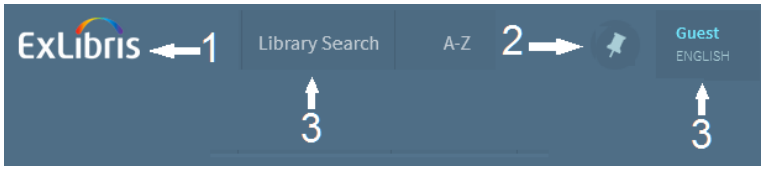


Full Record Page Components

1. `prm-full-view prm-brief-result-container{}`

Upper Menu

This section identifies the major components of the Upper Menu.



Upper Menu Components

1. `view_code/img/library-logo.png`
2. `.layout-align-end-center { }`
3. `prm-topbar .md-button:not(.md-icon-button) {}`

Hiding the Language Menu

To hide the language menu:

```
prm-change-lang {
  display: none;
}
```

Disabling Automatic Capitalization of Main Menu Links

To disable the automatic capitalization of all characters in the main menu links:

```
prm-topbar .md-button {
    text-transform: none;
}
```

Search Bar

This section identifies the major components of the Search Bar.

Search Bar Components

1. `prm-search-bar{}`

```
2. /* the text color in the search box */
   input::-webkit-input-placeholder { }
   input:-moz-placeholder { /* Firefox 18- */}
   input::-moz-placeholder {  /* Firefox 19+ */}
```

```
input:-ms-input-placeholder {}
```

3. `md-autocomplete-wrap input {}`
4. `prm-search-bar .simple-search-wrapper .search-actions .md-button {}`
5. `prm-search-bar .search-switch-buttons .md-button {}`

Moving the Facets to the Left Side

Out of the box, the new UI displays the facets on the right side of the results page. After the May 2017 release, you can use the **Side bar (Tweak my results) position** field in the Views Wizard (**Primo Home > Ongoing Configuration Wizards > Views Wizard**) to move the facets to either the left or the right side of the page.

Creating a Search Box With Deep Links to the New UI

This example creates a search box that uses a deep link to search your institution's catalog.

To create a search box:

1. Create an HTML file and include the following lines, making sure that you fill in the host name, customizable parameters (such as view code), and the fixed parameters (such as bulk size):

```
<html>

<head>

<meta http-equiv="Content-Type" content="text/html; charset=UTF-8">

<!-- Script that converts the query string into valid parameter -->

<script type="text/javascript">

function searchPrimo() {

document.getElementById("primoQuery").value = "any,contains," +
document.getElementById("primoQueryTemp").value.replace(/[,]/g, " ");

document.forms["searchForm"].submit();

}

</script>

</head>

<body>
```

```
<form id="simple" name="searchForm" method="get" target="_self"
action="http://<host_name>/primo-explore/search" enctype="application/x-www-form-
urlencoded; charset=utf-8" onsubmit="searchPrimo()">

<!-- Customizable Parameters -->

<input type="hidden" name="institution" value="<institution_code>">

<input type="hidden" name="vid" value="<view_code>">

<input type="hidden" name="tab" value="<tab_code must be lowercase>">

<input type="hidden" name="search_scope" value="<scope_name>">

<input type="hidden" name="mode" value="basic">

<!-- Fixed parameters -->

<input type="hidden" name="displayMode" value="full">

<input type="hidden" name="bulkSize" value="10">

<input type="hidden" name="highlight" value="true">

<input type="hidden" name="dum" value="true">

<input type="hidden" name="query" id="primoQuery">

<input type="hidden" name="displayField" value="all">

<!-- Enable this if "Expand My Results" is enabled by default in Views Wizard -->

<input type="hidden" name="pcAvailabiltyMode" value="true">

<input type="text" id="primoQueryTemp" value="" size="35">

<!-- Search Button -->

<input id="go" title="Search" onclick="searchPrimo()" type="button" value="Search"
alt="Search" style="height: 22px; font-size: 12px; font-weight: bold; background:
#DE6E17; color: #ffffff; border: 1px solid;">

</form>

</body>

</html>
```

Example search query:

```
https://my-primo.inst.com:1701/primo-explore/
search?query=any,contains,herring&tab=primo_central&search_scope=PC&vid=MY_VIEW&lang=en_US&of
```

The value specified for the **tab** parameter must be all lowercase even if its definition in the Views Wizard contains any uppercase letters.

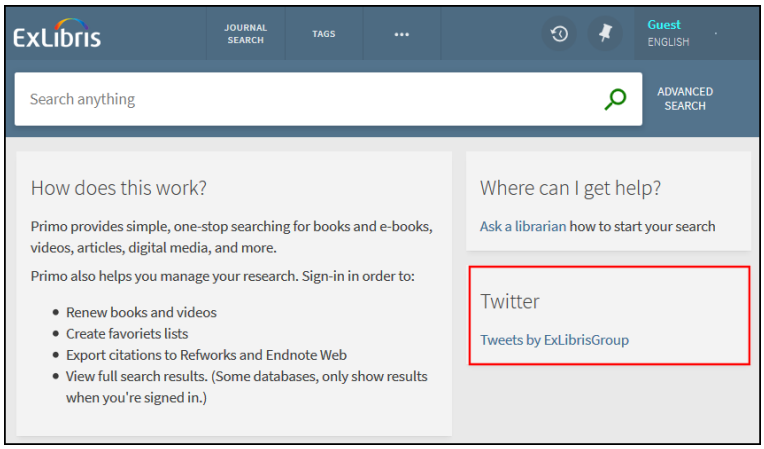
2. To test the search box, open the HTML file in a browser and perform a search. If you saved the HTML file on a Web server, use the following URL to access the search box:

   `http://<web_server>/<path>/<filename.html>`

   The search box appears as follows:

Creating a Twitter Feed

This procedure creates a link on the home page, which opens your Twitter feed in a new tab.



Link to Twitter Feed on Home Page

To add a Twitter feed:

1. Create an HTML link based on your Twitter feed. For details, see https://publish.twitter.com/.
2. Edit the `home_en_US.html` file and embed the HTML link created in the previous step.

   For example:

```
<div flex-xs flex="40" layout="column">
 <md-card class="default-card">
 <md-card-title>
 <md-card-title-text>
 <span class="md-headline">Twitter</span>
 </md-card-title-text>
 </md-card-title>
 <md-card-content>
<a class="twitter-timeline" href="https://twitter.com/
ExLibrisGroup?ref_src=twsrc%5Etfw">Tweets by ExLibrisGroup</a> <script async
src="https://platform.twitter.com/widgets.js" charset="utf-8"></script>
 </md-card-content>
 </md-card>
 </div>
```

3. Compress, upload, and deploy your updated customization package. For more information, see Using the UI Customization Package Manager.

Creating a Custom Help Page

The new UI allows you to create and embed a custom help page, which contains information on how to utilize the interface to access services provided by your institution. To provide a custom help page, you will have to create the help file, upload the help file to the server, and add a link in the new UI to allow users to access the help page.

Creating and Uploading the Help File

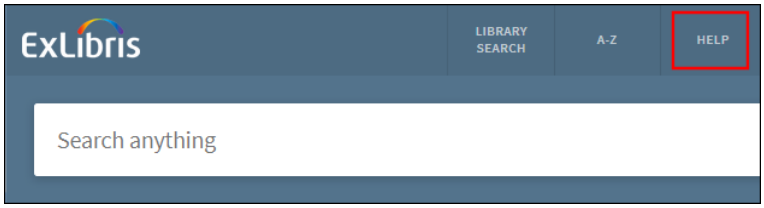
The new UI allows you to provide help files for each language supported by your institution. The naming convention is `help_<language>.html` (such as `help_en_US.html`). All custom help files must be paced in the `html` directory of your view's customization package.

To create and upload the help files:

1. Download your view's customization package (see Modifying a View-Level Package).
2. For each language supported, create an HTML help file (using the naming convention mentioned above).
3. Save the files under the `html` directory of your view's customization package.
4. Compress your view's package and upload it to the server (see Modifying a View-Level Package).

Adding the Help Link to the UI

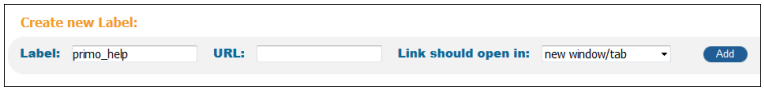
The Main Menu tile in the Views Wizard allows you to define the Help link that appears at the top of the page in the new UI.



Help Link in Main Menu Tile of the New UI

To add the Help Link:

1. In the Views Wizard (**Primo Home > Ongoing Configuration Wizards > Views Wizard**), edit your view.
2. Continue to the Tiles Configuration page and edit the **Home Page > Main Menu** tile.
3. In the **Create New Label** section, specify the following fields and then click **Add**:
   - **Label** – Enter **primo_help**.
   - **URL** – Leave blank so that the system uses the file that you uploaded with your view's customization package.
   - **Link should open in** – Specify where the help page will open in the browser. Select either **current window** or **new window/tab**.



Create New Label Section - Main Menu Tile

4. In the **Contents of Main Menu Tile** section, modify the **Label** field to change the label that displays in the Main menu of the new UI. This change updates the description for the **mainmenu.label.primo_help** code in the View Labels code table.
5. Save your changes to the view and deploy your view.
6. If necessary, update the **Description** column for the following codes in the View Labels code table to modify the label and label description for the help link in the new UI.
    - **mainmenu.label.primo_help** – Defines the label for the help link in the new UI. You can also update this value by changing the **Label** field of the Main Menu tile in the Views Wizard.
    - **mainmenu.description.primo_help** – Defines the description of the help link in the new UI.
7. Deploy your changes to the code table.

Primo Usability Guidelines and Test Script

Why Run Usability Tests?

Usability tests can help you:

- Identify when and where users succeed and fail
- Gain understanding of users' behaviors and goals
- Evaluate the effectiveness of UI customizations

You will see first-hand what researchers really do when they are conducting online research. You may find that what they do is different than what they say they do, or what they might think is the "right" way to do things.

Creating the Test

Define the goals for the study. What you are trying to learn? What questions are you trying to answer? Have a clear objective for each question or task in the test.

- Create tasks around user goals. What do users typically do on the site?
- Create tasks that include any features that you have customized (even if they are not common tasks).
- If you have any concerns that something on the site is not working, make sure to include it in your test.
- Test out the sequence of tasks to make sure that one task doesn't bias the outcome of another.
- The tasks should be written to avoid using the same labels that are used on the screen, to avoid leading participants.
- Once you have a list of tasks/question ready, go over each task/question and do/answer it yourself to make sure that each task works.
- Run a pilot study: before running your test with all of your participants, just run it with one participant to confirm everything works and participants are not confused by the tasks.

The tasks that you create can be open-ended or specific, depending on what you want to learn.

Here is an example of an open-ended task:

> Think of a current (or recent) project that involves online research. Spend five minutes using this site to do that research.

Here are some ideas for specific tasks:

- You have an assignment to write a 3-5 page paper on the economic impact of climate change. Find a peer-reviewed article that you could use in your paper.
- (For faculty) Create a reading list for a course you are teaching and email it to yourself.

- (For librarians) You are helping a student find material for a paper on developments in autism treatment over the past 3 years. The instructor told them that they can use any type of document except for newspaper articles. Show me how you would do that on this site.

For more tasks, see Primo Usability Guidelines and Test Script.

Recruiting Participants for the Usability Test Sessions

Define what user groups will use the Primo interface (for example: undergraduates, graduates, faculty/instructors, and librarians). In addition, consider including participants from various fields of study (for example: English and Physics). Each user group represents users who may have different goals, abilities, and expectations while using Primo.

How Many Should You Recruit?

It depends. We recommend starting with at least three users from each of your target user groups. After running several tests, step back and think about whether you are still learning something new or if you are hearing the same issues repeated. As long as you are still discovering new findings, continue to test with more users.

Running the Tests

- In addition to the test's moderator (the person who asks the participant questions and gives them tasks), have a second person act as the note taker to capture observations.
- Make sure the testing environment is similar to the participant's real environment. You might even consider meeting them where they normally do their online research.
- Before starting the test, make participants feel comfortable. Explain to them that you are evaluating the site and not them personally; there is nothing that they can say or do that is wrong. It's also ok to ask a couple of non-study questions just to establish a connection and trust.
- Sit next to them (not across from them), so you could observe how participants use the screen.
- Be objective in how you form questions; do not ask leading questions. For example, do not ask “How easy was it to …”. A better way to phrase it would be “How easy or difficult was it to …”
- Ask open-ended questions which allow more explanation (rather than Yes/No questions). For example, "Please tell me more about ..." or "What did you expect to happen when ..."
- Be neutral, avoid showing a positive or negative reaction whether a user completes a task or not.
- Record the session so you can share with others on your team who cannot observe the sessions. Showing a video clip of where a user struggles is more compelling than describing it in words.
- After each session, debrief with the note taker and any observers about what they observed.

Analyzing Test Results and Recommending Changes

- Be objective - take both positive and negative feedback into account

- Pay more attention to what users do rather than what they say they do
- Describe what you saw/heard/observed, before deciding how to respond
- Do not jump to conclusions after a couple of sessions
- Rank and prioritize issues according to severity and risk, choose the most important ones to address, identify issues that may need further testing

Test iteratively. Make small changes, and then test again.

See Also

- Turn User Goals into Task Scenarios for Usability Testing – Nielsen Norman Group

  https://www.nngroup.com/articles/task-scenarios-usability-testing/
- How a Complete Novice Learned User Testing in 10 minutes

  http://uxmastery.com/learn-user-testing-in-10-minutes/
- Usability testing hints, tips, and guidelines

  http://www.uxforthemasses.com/usability-testing/
- Talking with Users During a Usability Test

  https://www.nngroup.com/articles/talking-to-users/
- Usability testing in the Academic Library – Digital Commons

  http://digitalcommons.macalester.edu/cgi/viewcontent.cgi?article=1216&context=libtech_conf
- Why You Only Need to Test with 5 Users - Nielsen Norman Group

  https://www.nngroup.com/articles/why-you-only-need-to-test-with-5-users/usability.gov
- Templates and Downloadable Documents

  https://www.usability.gov/how-to-and-tools/resources/templates.html

Primo Usability Test Script for Librarians

Introduction

- Introduce yourself
- Reassure the participant that you are testing the site, not them
- Encourage the participant to 'think out loud'
- Ask them to sign a consent form/recording release (if applicable)
- Start recording the session (if applicable)

Record Basic Information

- Participant's name
- Date of session
- Moderator’s name

Pre-Test Survey

- (For librarians and faculty) What is your role?
- (For students) What is your year in school and your field of study or major?

Tasks

Tasks	Purpose
1. Think of a current (or recent) project that involves online research. Spend 5 minutes using this site to do that research.	A general task is to get the user comfortable and in the mindset of doing online research. This also allows you to observe more closely how the user conducts online research on their own.
2. You have a short writing assignment on the spread of the Zika virus. Find an article from a peer-reviewed journal that you can use for your paper.	Check to see if users have any issues with locating articles from a peer-reviewed journal (a common user goal)? Do users notice and/or use the 'articles' option in the search form's autosuggestion list? Do they use Advanced Search? If so, do they experience any issues with the form? Do they use the result filters? If so, do they experience any issues with using filters?
3. Now limit your results to only articles written by Mark Fischer.	In Primo, filters scroll independently from the list of results and we wanted to know if that poses any usability issues. So, we set up a task where a user would use the 'Creator' filter, which requires scrolling to view.
4. Imagine that one of the result items is perfect for a friend. How would you email it to them?	Tests the ease of use of emailing result items.
5. Run a new search on early childhood education programs. Adjust your results so they do NOT contain any newspaper articles.	Tests 'Clear filters' and 'Exclude this' functionality.

Tasks	Purpose
6. Now find 3 peer-reviewed articles on this topic and add them to a list that you can get back to later. Use Primo to make this list.	Tests the usability of the 'save' functionality.
7. This site allows you to access information on library material you have checked out. For purposes of the test, you have an item coming due, please renew that item.	Do users know where to go to log in? Do they experience any issues with signing into their library account? Are users able to renew an item?
8. Go to the list of articles you just made and add a label to each item.	Tests whether users can locate the list of saved items and use the 'label' functionality.

Post-Test Survey Questions

These questions could be asked verbally, or you could ask them to fill out a survey form.

What did you like most about the site? Why?

What would improve the site? Why?

Wrap-Up

Stop the recording (if applicable).

Give them their incentive—for example, a gift card (if applicable).

Thank them for participating in the test.