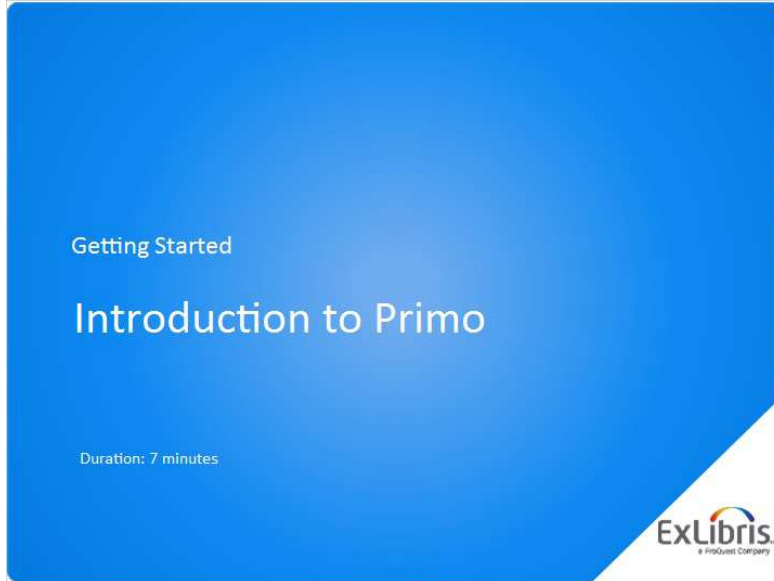# Introduction to Primo

1. Getting Started: Introduction to Primo
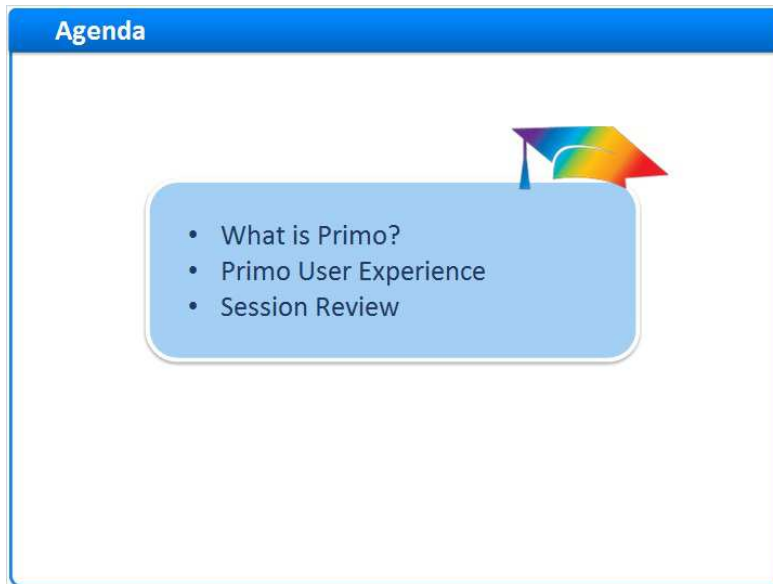
1.1 Getting Started: Introduction to Primo

Notes:

Hello, and welcome to this introduction to Primo

1.2 Agenda
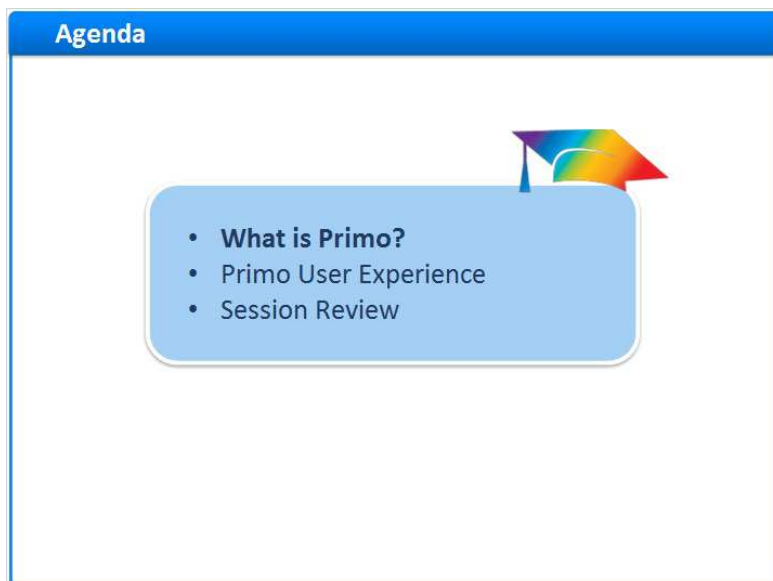
Notes:

In this session, we will learn what Primo is, and explore the Primo user experience. And at the end of the session, we'll have a brief review.

1.3 What is Primo?

Notes:

What is Primo?

1.4 What is Primo?

The Primo discovery service makes it easier and faster for library staff, students, and researchers to find the resources they need. Primo empowers libraries to shape the discovery experience, in order to provide patrons an intuitive, end-to-end service, and maximize the value of library collections.
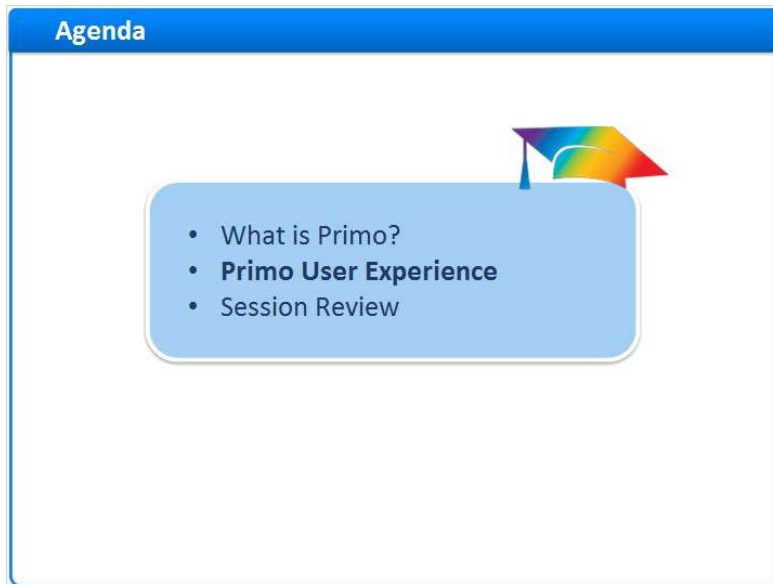
Notes:

The Primo discovery service makes it easier and faster for library staff, students, and researchers to find the resources they need. Primo empowers libraries to shape the discovery experience, in order to provide patrons an intuitive, end-to-end service, and maximize the value of library collections.

This means that Primo can be configured to search your library catalog, your subscription databases, and other digital collections all at once. It will retrieve a list of those results, and allow you to refine your results based on the records that returned. And it will provide information on how to access the materials, whether they're on a shelf in the library or in a subscription database online.

1.5 Primo User Experience
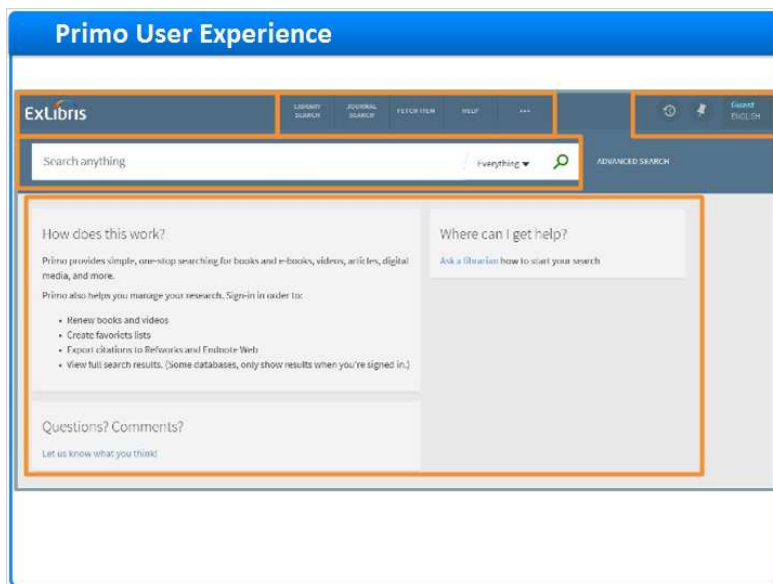
Notes:

The Primo User Experience

1.6 Primo User Experience

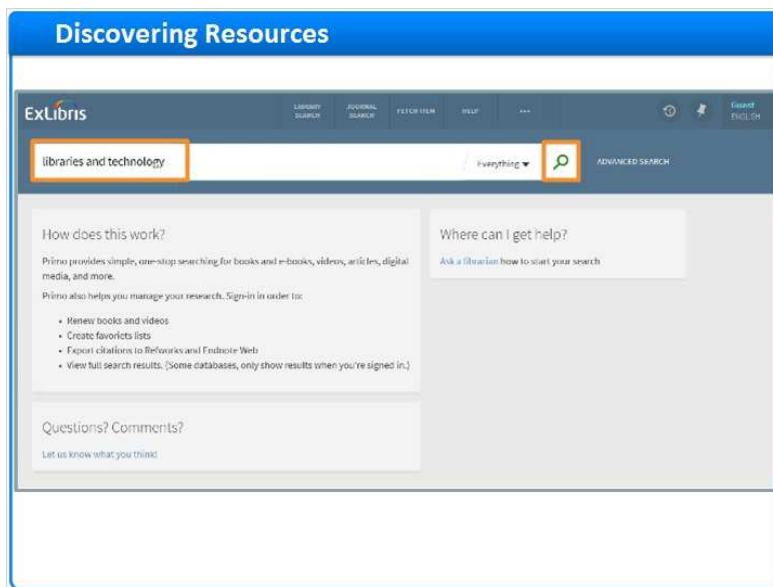**Notes:**

This is the default view of Primo.

During your implementation, we will work with you to re-brand and customize this view. At the top of the screen, you will have your institution's logo.

To the right, you have a series of customizable navigation links, and an area where you can sign in and access your account information and favorites.

 Just below the navigation area we have the search box, where you will be able to search your ILS holdings, the Primo Central Index, and any digital repositories included in your implementation.

And below that, there is information about how Primo works, where to get help, and where to go to ask questions or submit comments. This area can be customized as well.

1.7 Discovering Resources

Notes:

Let's imagine we're researching libraries and technology.

We'd start our search in Primo, entering the term in the search box, and clicking the magnifying glass icon.

In less than a second, Primo searches both your local and remote resources, and then replaces the home page content with the search results.

Search Results (Slide Layer)

## 1.8 Search Results – Sorting

Notes:

This search returned over 350,000 results which, by default, are sorted by relevance.

Primo uses a proprietary algorithm to determine how relevant each result is to the search term. Results that are highly relevant are placed at the top of the search results, while less relevant results are placed further down in the list.

It is also possible to sort results based on other criteria, such as date, author, and title.

1.9 Search Results – Refining Results
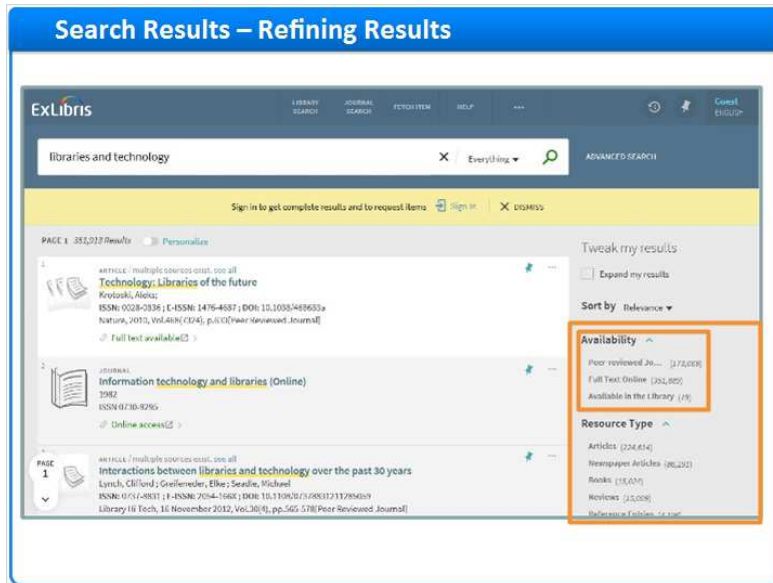
Notes:

We can also refine our results. Since we do not want to look this many results, we can filter our results by any given criteria.

For example, if I am accessing Primo off campus I may only be interested in the materials I can see online. I would select **Full Text Online**, and any physical resources would be removed from my results list.

Or, if I am sitting in the library , I may want check out any materials before I leave so that I can take them home for further study. I can select **Available in the Library**, and the search results will return any physical resources that I might be interested in.

There are other filters available - I can refine by the resource type, subject, author/creator, creation date, library and collections, language, and journal title. We can see the top five results in each filter, but it is possible to show more.

Let us say I am just looking for articles. I would select **Articles**, then **Apply Filters**

Once the filter is applied, we can see the **Active Filters** here, and adjust them as needed.

filters (Slide Layer)

refine by resource type (Slide Layer)

filter applied (Slide Layer)

1.10 Search Results – Brief Results

Notes:

Now let us take a closer look at the results themselves.

The first result is a journal article. Here in the brief description, I can see the authors of the article, the journal the article appears in, the date, and the volume and issue information. I can tell that it is an electronic resource because the availability link says that full text is available. If I click on this link, I'll be brought directly to the article in its

subscription database.

The second result is a book. Again I can see details about this book - the author, publisher, publication date, and ISBN. And I can tell that it's a physical resource because the availability link says that the book is checked out of the Graduate Library.
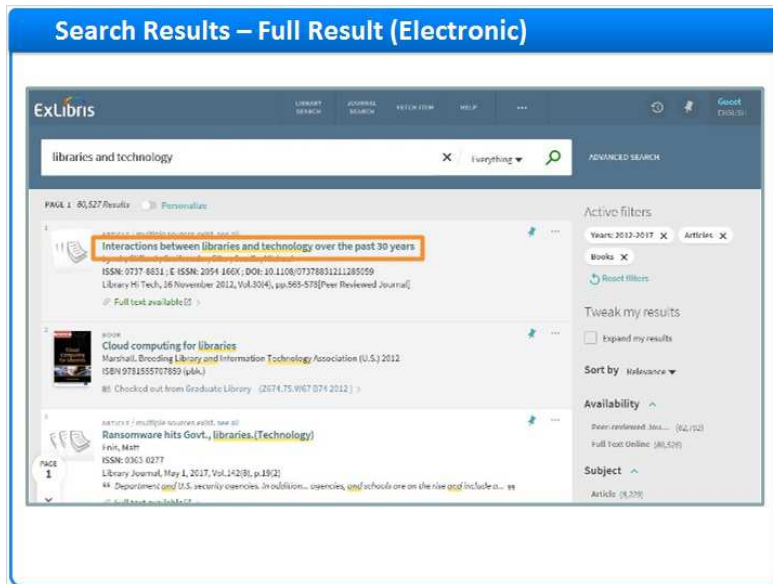
I can add both of these records to my favorites by clicking on the pin icon. If I click on the ellipses I have options to export the record out to various citation managers, create a permanent link to this record, print the record, and email the record.

I'm going to click on the X to exit out of this pop-up.

options (Slide Layer)

1.11 Search Results – Full Result (Electronic)

Notes:

If I want to get additional information about a resource, I can click on the title.

Here I can see the brief result and the Send to menu as well, but now I have more information.

Under View it, I can see a list of the links to the full text article in various subscription data bases.

In the Details section, I can see the full information provided in the record.

In the Links section I can see any links that were provided in the record. If the library chooses to display the Get It information, we can access ILL or other functions for the record. And under citations, if there are any other sources that have cited this article, I will see them listed here.

To close out of the full record, and go back to the list of results, I can click the X here.

Full Record (Slide Layer)

View It (Slide Layer)

Details (Slide Layer)

Links (Slide Layer)

1.12 Search Results – Full Result (Physical)
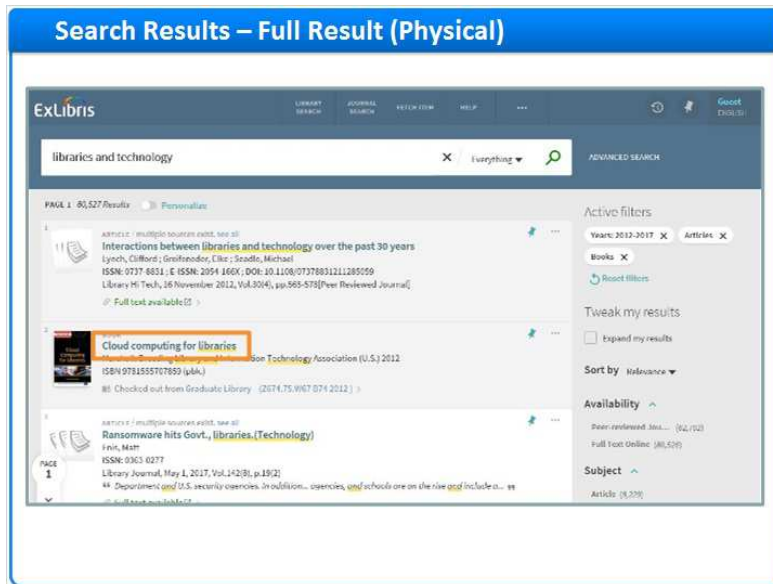
Notes:

Let's look at the full record for the physical resource Cloud computing for libraries.

Notice that I have some of the same sections, but there are a few differences.

In the Get It section, I can request the item, and see more information about where the resource is located, if there are multiple copies, and it's current status.

The Details section contains the full information for the record. In the Links section I can access the table of contents for this resource, and see it in Amazon or WorldCat.

For physical records, Primo provides a Virtual Browse feature that allows us to see the books that are next to this one on the shelf.

Let's return to the list of results.

Full Record (Slide Layer)

Get It (Slide Layer)

Details and Links (Slide Layer)

Virtual Browse (Slide Layer)

1.13 Search Results – Favorites
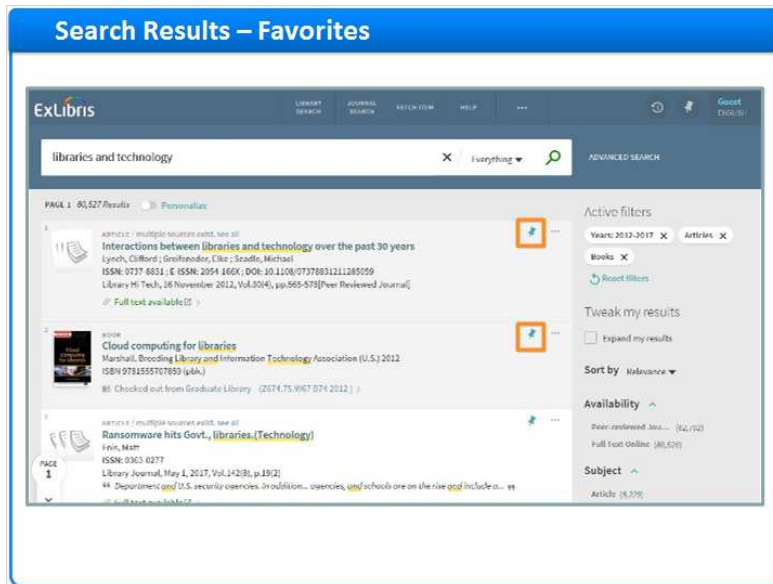
Notes:

Now that we have spent some time reviewing our search results, perhaps we would like to add a few to our favorites so that we can reference them later, email them to a friend or colleague, or even print them out.

To save citations, we click the pin. Once they have been pinned, the records turn yellow. We can now see a list of our favorites by clicking on the pin icon at the top of the screen.

Here in my favorites, we can see our saved records, any searches we've saved, and our search history.

And at any time, I can conduct a new search here, or I can click Library Search to return to Primo's homepage.

Selected records (Slide Layer)

Favorites screen (Slide Layer)

1.14 Session Review

Notes:

Session Review

1.15 Session Review

Notes:

In this session we learned what Primo is, how to search for resources in Primo, and how to refine, sort, and save our results.

Please continue on to the next training session in this series. Please also consider watching the Using Primo session for an in depth look at the Primo User Experience.

1.16 Thank You!

Thank You!

Visit the Ex Libris Knowledge Center
http://knowledge.exlibrisgroup.com

ExLibris
a ProQuest Company
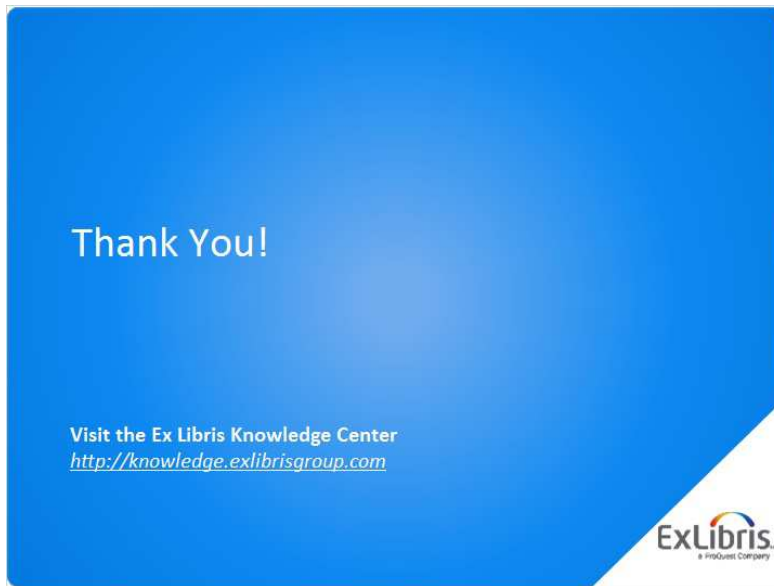
Notes:

Thank you for joining this session!

1.17 About this Training
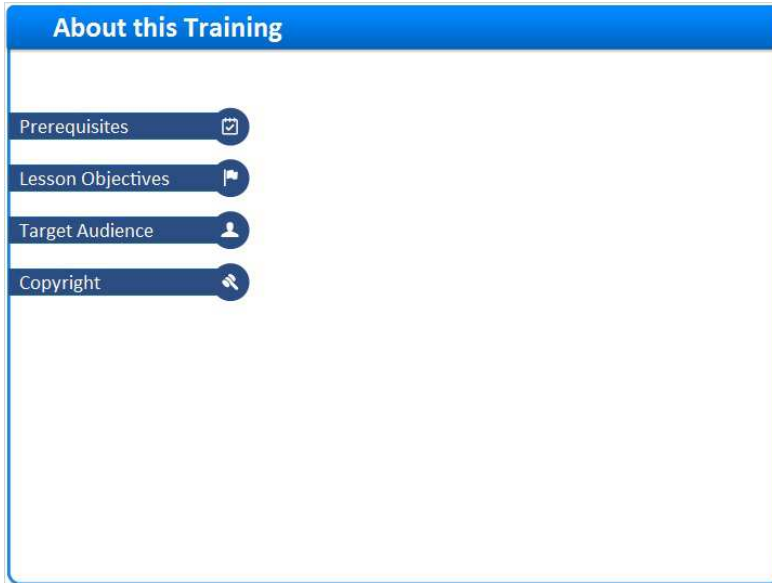
Notes:

1 (Slide Layer)
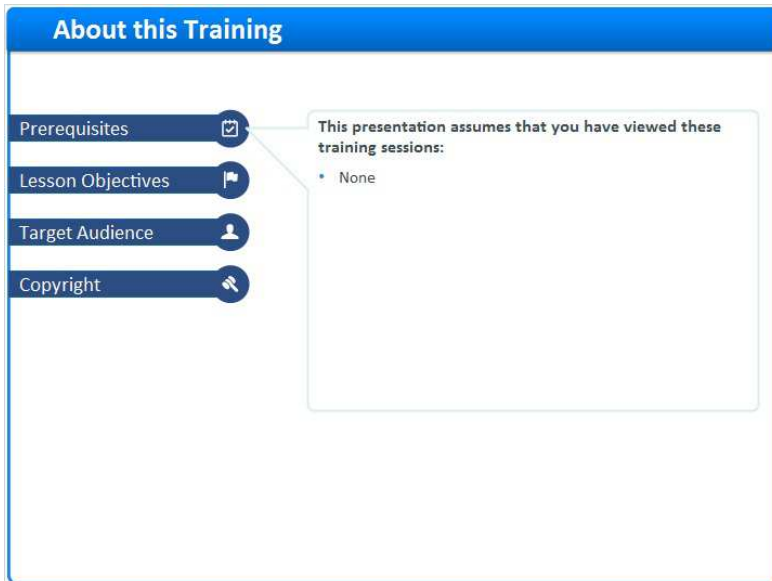
2 (Slide Layer)

About this Training

Prerequisites

Lesson Objectives

Target Audience

Copyright

By the end of this training session, you will know:

- What Primo is
- How it will help your patrons

3 (Slide Layer)

About this Training

Prerequisites

Lesson Objectives

Target Audience

Copyright

Target Audience:

- Staff using and/or configuring Primo

4 (Slide Layer)

About this Training

Prerequisites

Lesson Objectives

Target Audience

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