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## Primo New UI

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# Primo New UI

Whitworth Library Department Retreat 2017

September 1, 2017

Hill House

# Outline

- ▶ Navigation
- ▶ Basic searching—tabs and scopes
- ▶ Advanced searching
- ▶ Facets
- ▶ Journals by Title
- ▶ Browse
- ▶ My Favorites
- ▶ My Account
- ▶ Services Page
- ▶ Primo Analytics
- ▶ Coming Soon

# Navigation

- ▶ Logo—link to library landing page
- ▶ Main menu—Research Guides, Journals by Title, Browse
  - ▶ Hidden: Citation linker, Tags, Help
- ▶ Scrolling—As you scroll through results facets and “return to top” button float
- ▶ Results are paginated—click “Load more Results” for next page or use pagination button
- ▶ Click “Guest” to show Sign In and My Account buttons
- ▶ Show and tell; sandbox at <http://alliance-primo-sb.hosted.exlibrisgroup.com/primo-explore/search?vid=WW&sortby=rank>

# Basic Searching—Tabs

- ▶ First note the cool auto-complete functionality
- ▶ Tabs have moved to a drop-down in the main searchbox
  - ▶ Library resources—default, all our stuff
  - ▶ Course reserves
    - ▶ Instructor, course title, course number are included in the “keyword” index
    - ▶ But no longer as separate indexes
    - ▶ Try: Core 350
  - ▶ We may consider creating “course reserves” as a scope instead

# Basic Searching—Scopes

- ▶ Whitworth—physical items in Alma + ebook collections from the Alliance (default)
- ▶ Whitworth, Summit and Articles—physical items in Alma, ebook collections from the Alliance, books from Summit libraries, articles indexed in our PCI collections (“everything”)
- ▶ Articles and More—articles indexed in our PCI collections
- ▶ Summit—physical items in Alma, ebook collections from the Alliance, and books from Summit libraries
- ▶ Whitworth + Articles and More—physical items in Alma, ebook collections from the Alliance, articles indexed in our PCI collections (used to support the Journals A to Z function)

# Advanced Searching

- ▶ Dynamically alters page rather than navigating to a new page so previous search information is kept
- ▶ Indexes and specificity as before
  - ▶ “User Tags” is showing up here as an index
- ▶ Pre-filters for material type, language, publication date
  - ▶ Material types are not identical to resource type in facets
  - ▶ Languages in pre-filter are those taught at Whitworth
  - ▶ Publication dates are ranges, but select “specific date” to enter one
- ▶ Add rows dynamically

# Facets

- ▶ Order by most popular
  - ▶ Availability, Topic, Resource Type, Creation Date, Location in Library appear expanded on load
  - ▶ Language, New Records, Collection (PCI only), Creator, Journal Title (PCI only), LC Classification collapsed on load
- ▶ Multiple facet selection is back as of August release (see sandbox)
  - ▶ Include/exclude available
  - ▶ Multiple facets within one facet-group are understood as OR
  - ▶ Multiple facets from different facet groups are understood as AND
  - ▶ For Geeks Only: for NOT you can use the advanced search or exclude, but for NOR (neither is true) XOR (one is true but not both) XNOR (both or neither is true) you're out of luck.



# Facets

- ▶ Expand my results (PCI only)
  - ▶ Includes items that are indexed in the PCI collections we have activated, but for which we do not have a full-text service
  - ▶ We do not include an ILL link in the detailed view, so these are a dead-end for patron searches
  - ▶ Use with caution
- ▶ Sort by
  - ▶ Relevance, date, author, title
- ▶ Suggested searches
  - ▶ Now gone

# Journals by Title

- ▶ We do not use the native Primo Journals A-Z function
  - ▶ Indexes ejournals only by Alliance norm rules
- ▶ Instead we have a home-grown widget on a lib guide
- ▶ Some known issues
  - ▶ Navigates to Primo advanced search, which takes a lot of space
  - ▶ NR (prefer 130 to 245) adds (Online) to end of (many) ejournals which can make them file lower (try "Cell")
  - ▶ I remove leading articles (in English, Spanish, and French) from queries since the Primo index is inconsistent, which occasionally causes problems ("A Contrario" "THE Journal")

# Browse

- ▶ Currently may browse by: subject, author, title, LOC call no.
  - ▶ Subject known issues
    - ▶ Browses all vocabularies (try “philosophy”)
    - ▶ Not possible to search by subheading only (e.g., “juvenile fiction”)
  - ▶ Author works nicely
  - ▶ Title (?! What is this useful for?!) (try “Bible”)
  - ▶ LOC call no.
    - ▶ Ignoring single digits after decimal place is *still* broken (since last November) (try “M3.1”)

# My Favorites

- ▶ Saved records
  - ▶ This is where things go when you click the push-pin
  - ▶ Select items to perform actions
    - ▶ Add label—instead of folders you now get tags; filter on the right
    - ▶ Unpin
    - ▶ Actions/push-to menu, e.g., to email, print, use bibliographic utility
- ▶ Saved searches
  - ▶ Option to pin a search if you are logged in
  - ▶ Can create an email alert, RSS feed after August release

# My Favorites

- ▶ Search history
  - ▶ From current session only
  - ▶ Option to save searches from this page
- ▶ To return to current search click on the magnifying glass by your name (back-button in browser does not always behave predictably in single-page applications)

# My Account

- ▶ Overview page
- ▶ Loans: sort, renew (all, selected), expand/collapse
- ▶ Requests
- ▶ Fines and fees
- ▶ Blocks and messages
- ▶ Personal details, contact info., expiration dates, letters (soon I will have “edit” buttons hidden, since you can’t edit our info)

# Services Page

- ▶ 6,000,000 times better than the classic UI (no tabs!)
- ▶ Go to PQ Research Library, search on “net neutrality”
  - ▶ If electronic portfolio available “View it online” (e.g., “Net neutrality faces a political firestorm”)
  - ▶ If physical item available “Get it in the library” (e.g., “Viewpoint when network neutrality met privacy”)
  - ▶ If neither “Get it in the library” with “There are no physical holdings for your search” (many libraries put ILL link here)
- ▶ As before, if available in PQ Research Library other PQ links are hidden, if available in EBSCO ASC other EBSCO links are hidden





# Primo Analytics

## ► Zero-results searches

Date	Primo View	Search String	Field Searched	Search Scope	Search Scope Type	Signed In
Aug 01	WW	dahlia ravikovitch	any	WW_ALMA	Local	No
		ocm06141138	any	default_scope	Blended	No
		total cost of ownership models: An exploratory study	any	default_scope	Blended	No
		virtuous minds by dow	any	WW_ALMA	Local	Yes
				WW_SUMMIT	Local	Yes
Aug 02	WW	Anchor Bible	any	WW_ALMA	Local	No
		Ethical Leadership and social responsibility	any	default_scope	Blended	No
		Managing technological and social uncertainties of innovation: the evolution of Brazilian energy and	any	default_scope	Blended	No
		Neighborhoods in transition : William Penn's dream	any	WW_ALMA	Local	Yes
		Performance measures and metrics in a supply chain environment	any	default_scope	Blended	No
		african americans and parents	any	default_scope	Blended	No
		chocolate bunnies	any	default_scope	Blended	Yes
		ocm00417537	any	default_scope	Blended	No
		ocm08135411	any	default_scope	Blended	No
		ocm09039880	any	default_scope	Blended	No
		ocm12971505	any	default_scope	Blended	No
		Aug 03	WW	For Panels (Including Roundtables) Only one member of a panel should submit a panel proposal. This contact person is designated the "corresponding author." Step 1: Format Choose the "Panels" format. Step 2: Title and Abstract Panel title in the "Title" box. IMPORTANT: In the "Abstract" box include the following: Panel title. Name and institutional affiliation of panel chair. Name	any	WW_ALMA
ocm05168103	any			default_scope	Blended	No
ocm23899706	any			default_scope	Blended	No
ocm35808430	any			default_scope	Blended	No

# Coming Soon

- ▶ August Release
  - ▶ Email security
  - ▶ Sticky facets
  - ▶ Sort in favorites
  - ▶ Featured results
  - ▶ Multiple facet selection
  - ▶ RSS feeds in new UI
  - ▶ Silent login authentication
  - ▶ Search expansion with controlled vocabulary
  - ▶ Resource recommender

# Coming Soon

## ▶ NRWG

- ▶ Music information from 382, 383, and 384: display, facets, index
- ▶ Work information from 041, 046, 257, 370, 377, and 386: display, facets, index
- ▶ Audience information from 385, 521, and 008: display, facet, index
- ▶ Relator terms from 100 and 700: facets
- ▶ Local title from 95X to “Includes” and “Related Works and Collections” display
- ▶ Alternate form of title includes 210, 222, 242, 246
- ▶ Uniform title excludes 246
- ▶ Links in 856 now exclude local fields from other institutions
- ▶ Links to Amazon and WorldCat made independent

# Coming Soon

## ▶ NRWG

- ▶ Topic facet: now only LCSH and FAST
- ▶ Genre facet: foreign language genre terms excluded
- ▶ Creator facet: forms from different sources (e.g., PCI vs. MARC) normalized and combined
- ▶ ISBN/ISSN indexes: data from 020\$e and 022\$e added
- ▶ Ids50 has class attribute added for unique customization (i.e., virtual bookplates)
- ▶ Some of these are implemented globally in the Alliance by NRWG, but most are merely enabled, so I will need to configure our Primo