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# **Agenda**

- Primo Links
- Configuration Options
- Results
- Primo Central
- EBSCO
- Next Steps
- Questions





#### **Primo Links**

Production Front End (current UI):

<u>http://calstate-primoprod.hosted.exlibrisgroup.com/primo\_library/libweb/action/search.do?vid=<viewlD></u>

Production Front End (new UI):
 <a href="http://calstate-primoprod.hosted.exlibrisgroup.com/primo-explore/search?vid=<viewID>">http://calstate-primoprod.hosted.exlibrisgroup.com/primo-explore/search?vid=<viewID></a>

Production Back Office:
 <a href="http://calstate-primoprod.hosted.exlibrisgroup.com:1601/primo-publishing/admin/acegilogin.jsp">http://calstate-primoprod.hosted.exlibrisgroup.com:1601/primo-publishing/admin/acegilogin.jsp</a>
 Read only access: refer to "BE User" column on upcoming slides for your login

Sandbox (coming soon)

## **View IDs**

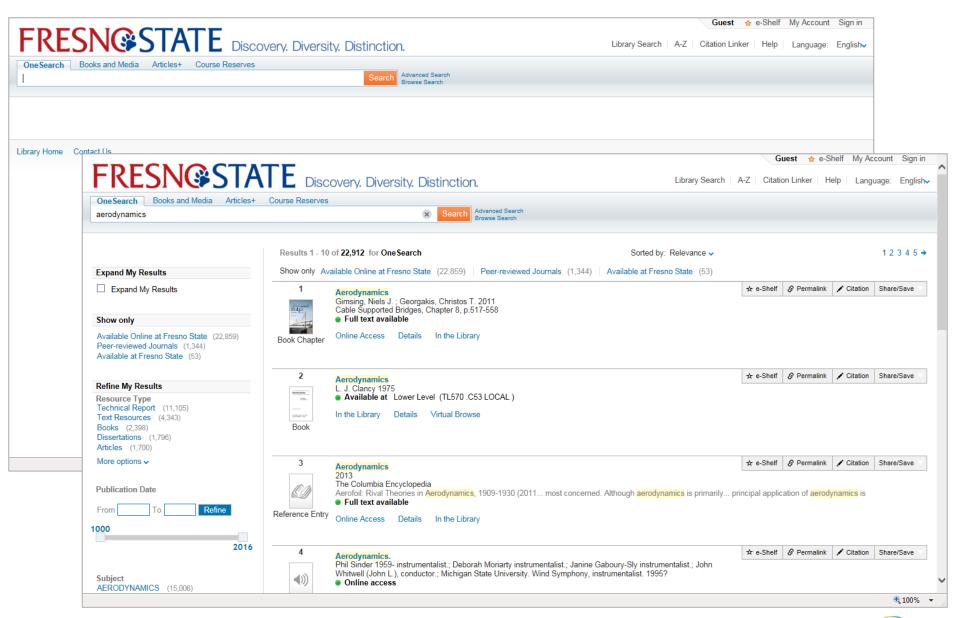
Institution	View ID	BE User
California State University, Bakersfield	01CALS_UBA	01CALS_UBA / Bakersfield
California State University Channel Islands	01CALS_UCI	01CALS_UCI / ChannelIslands
California State University, Chico	01CALS_CHI	01CALS_CHI / Chico
California State University, Dominguez Hills	01CALS_UDH	01CALS_UDH / DominguezHills
California State University, East Bay	01CALS_UHL	01CALS_UHL / EastBay
California State University, Fresno	01CALS_UFR	01CALS_UFR / Fresno
California State University, Fullerton	01CALS_FUL	01CALS_FUL / Fullerton
Humboldt State University	01CALS_HUL	01CALS_HUL / Humboldt
California State University, Long Beach	01CALS_ULB	01CALS_ULB / LongBeach
California State University, Los Angeles	01CALS_ULA	01CALS_ULA / LosAngeles
California State University Maritime Academy	01CALS_MAL	01CALS_MAL / Maritime
California State University, Monterey Bay	01CALS_UMB	01CALS_UMB / MontereyBay

## View IDs cont.

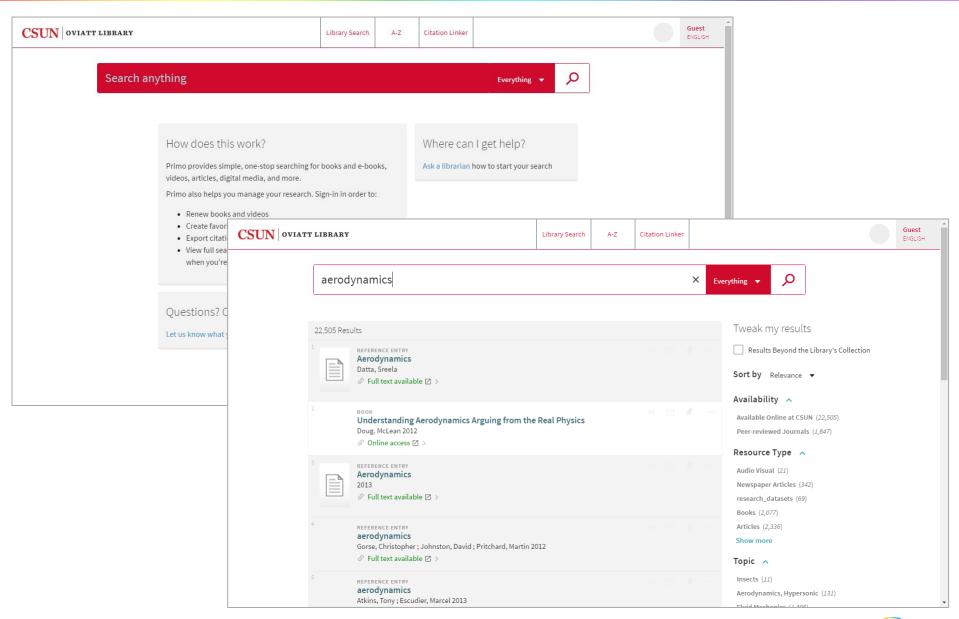
Institution	View ID	BE User
Moss Landing Marine Laboratories	01CALS_MLM	01CALS_MLM / MossLanding
California State University, Northridge	01CALS_UNO	01CALS_UNO / Northridge
California State Polytechnic University, Pomona	01CALS_PUP	01CALS_PUP / Pomona
California State University, San Bernardino	01CALS_USB	01CALS_USB / SanBernardino
San Diego State University	01CALS_SDL	01CALS_SDL / SanDiego
San Francisco State University	01CALS_SFR	01CALS_SFR / SanFrancisco
San Jose State University	01CALS_SJO	01CALS_SJO / SanJose
California Polytechnic State University, San Luis Obispo	01CALS_PSU	01CALS_PSU / SanLuisObispo
Sonoma State University	01CALS_SOL	01CALS_SOL / Sonoma
California State University, Stanislaus	01CALS_UST	01CALS_UST / Stanislaus
California State University, Sacramento	01CALS_USL	01CALS_USL / Sacramento
California State University San Marcos	01CALS_USM	01CALS_USM / SanMarcos



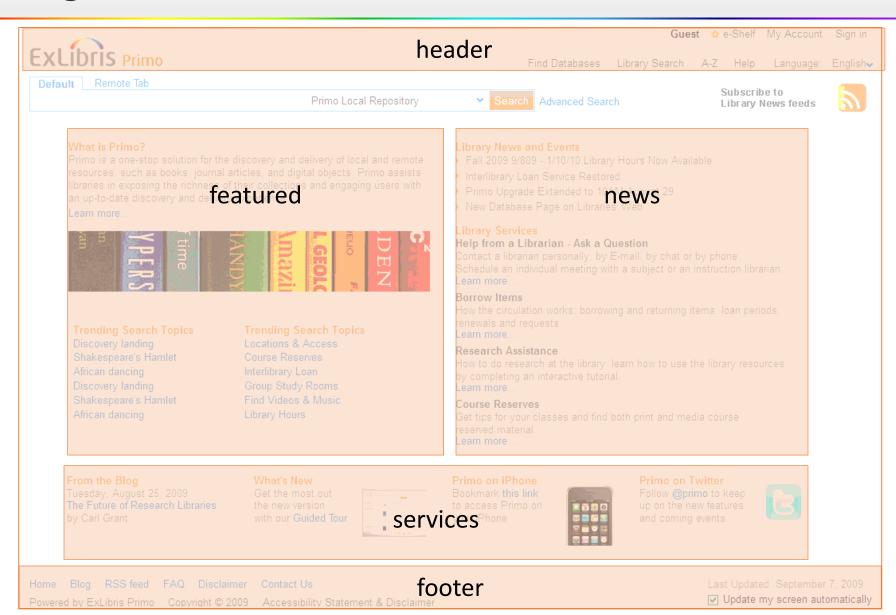
#### **Current UI**



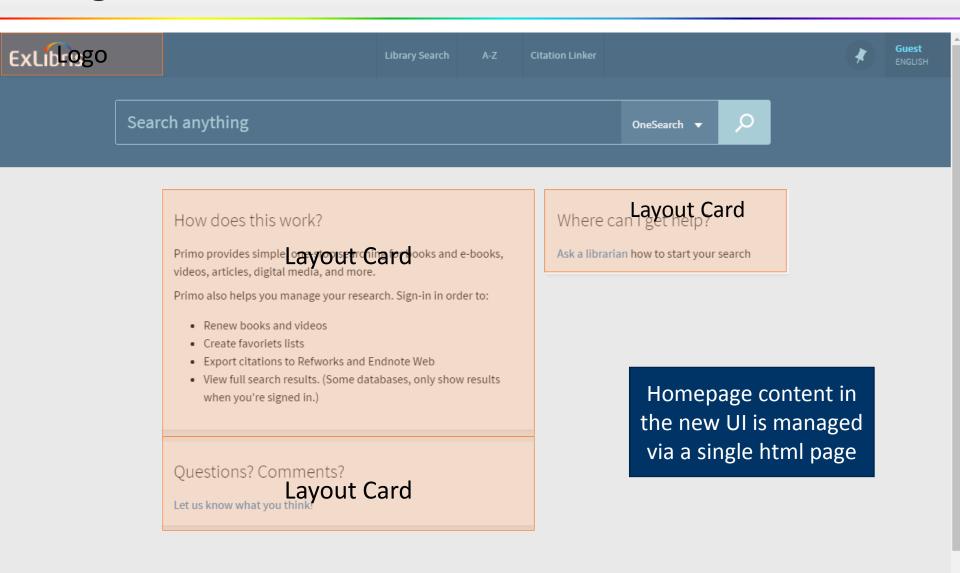
#### **New UI**



## Page Structure - Current UI



## Page Structure - New UI



## Page Structure - Configuration Options (current and new UI)

#### Ex Libris:

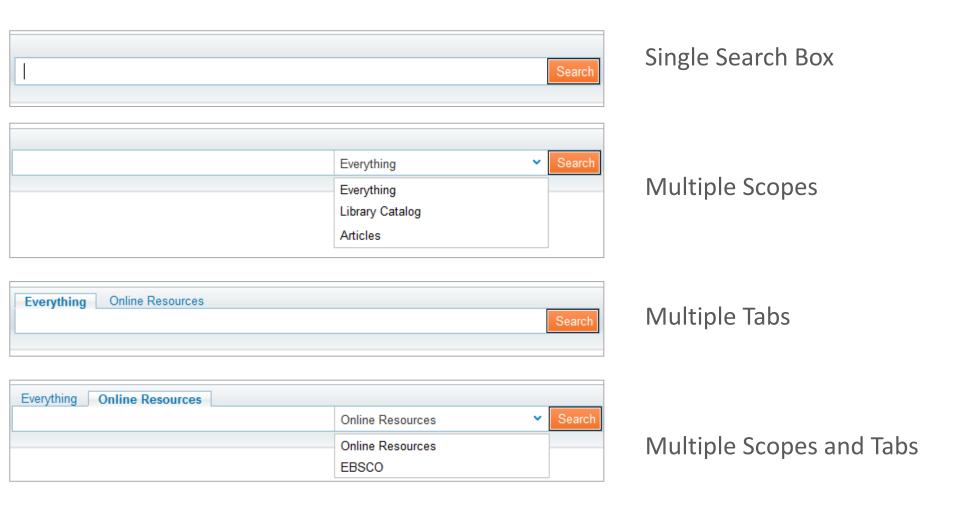
- Implement the logos from your website
- Customize default links in header and footer
- Provide you with a zip file containing directories for CSS,
   HTML, image (img) and javascript (js) files for each view (new UI)
- Provide you with CSS and HTML files for each view (current UI, for reference)
- Provide instruction on how to edit files

## Page Structure – Configuration Options (new UI)

#### CalState:

- Change or update your logo
- Change colors of text, search button, etc. via CSS
- Change header navigation
- Manage files using the UI Customization Package Manager within the Primo Back Office (new UI)

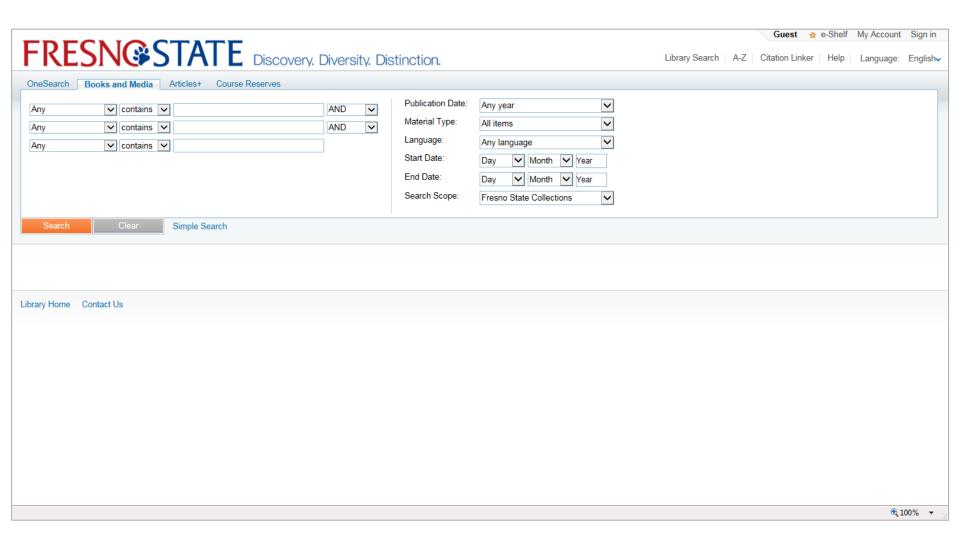
## **Basic Search – Scope and Tab Options**



## **Basic Search – Configuration Options**

- Ex Libris implements a default search box, which includes:
  - Everything tab blended Primo Central and institution scope
  - Books & More tab separate institution and network search scopes
  - Course Reserves tab (not populated yet)
  - Articles & More tab separate Primo Central and EBSCO search
- CalState can add or reconfigure search scopes and tabs

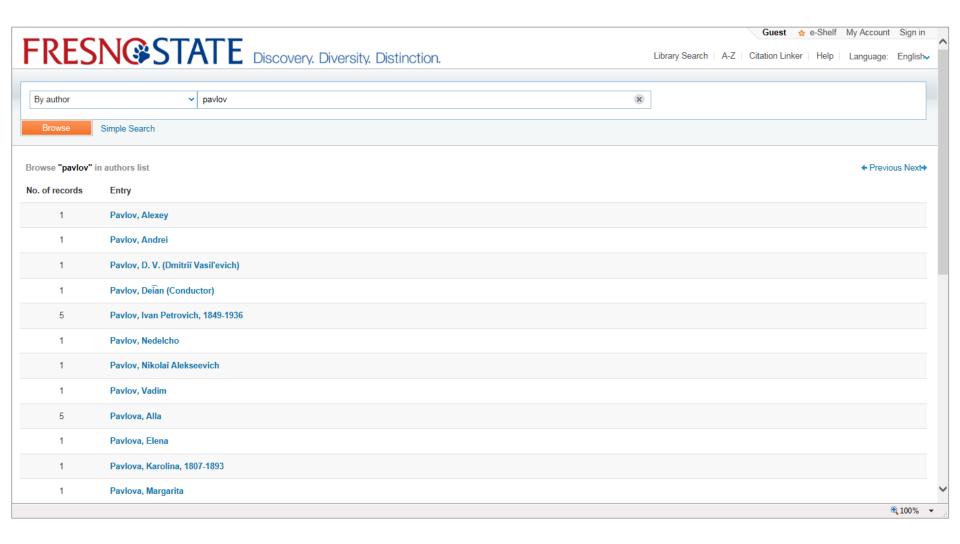
## **Advanced Search**



## **Advanced Search – Configuration Options**

- Ex Libris implements advanced search, which includes:
  - Three search bars (requested by Discovery Working Group)
  - Pre-filters (Publication Date, Material Type, Language, Start Date, and End Date)
  - Call Number and OCLC Number
  - ISBN and ISSN (requested by Discovery Working Group)
  - Relevant course fields added to the search bars in Course Reserves tab
- CalState can remove or adjust pre-filters

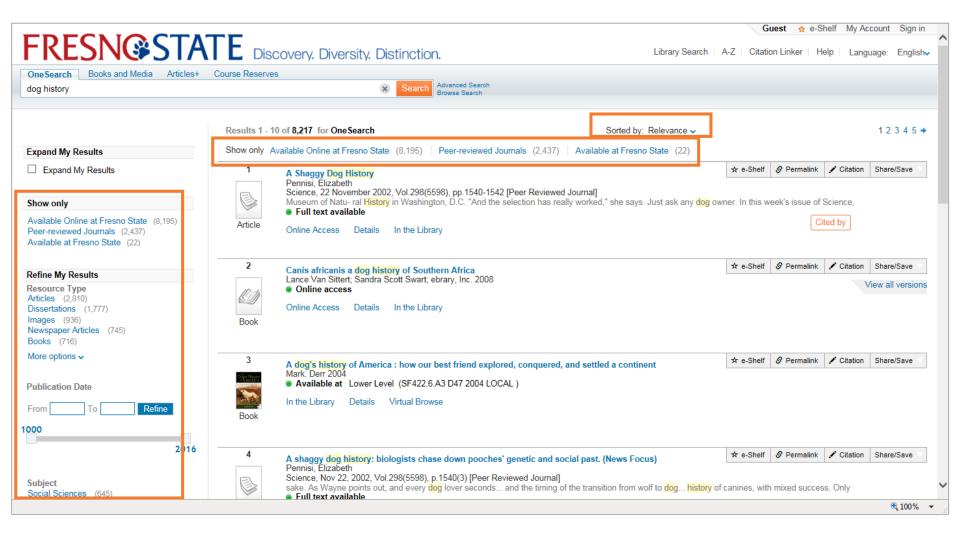
## **Browse Search**



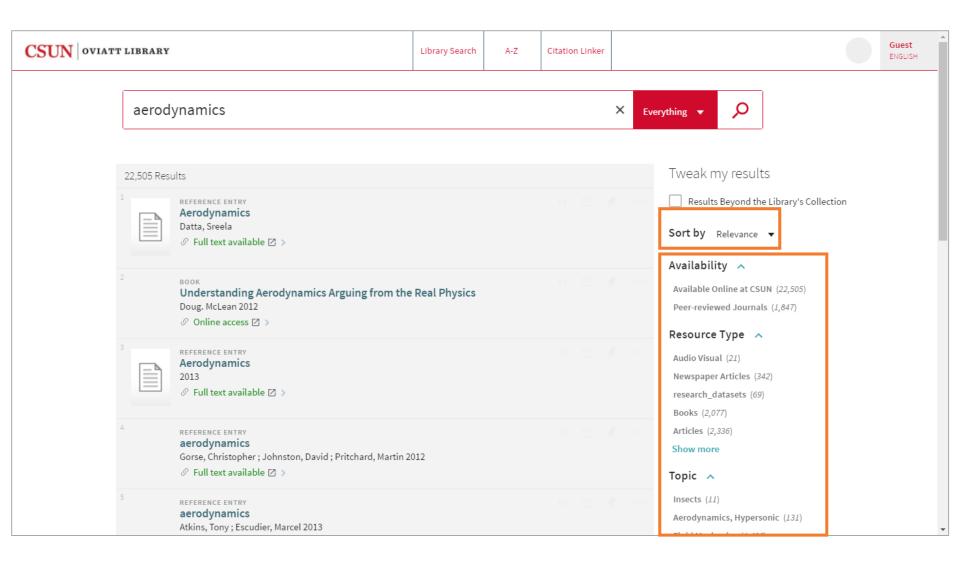
## **Browse Search – Configuration Options**

- Ex Libris implements default browse search:
  - By title
  - By author
  - By subject
- Ex Libris implements browse search options requested by Discovery Working Group:
  - By Library of Congress call numbers
  - By Dewey call numbers
- CalState can remove/adjust display text and/or determine if you want to disable browse

#### Search Results – Current UI



## Search Results - New UI



### **Search Results – Facets**



- Top-level:
  - Peer-reviewed Journals (PC)
  - Full Text Online
  - Available in Library
- Resource Type
- Topic
- Creator
- Locations (Alma)
- Collection (PC)
- Creation Date
- Language
- Journal Title (PC)

# **Facets – Configuration Options**

- Ex Libris implements additional facets:
  - Configure library facet to reflect your collections
  - Add course reserve facets
- CalState can:
  - Remove/reorder facets
  - Change facet headers (i.e. Author/Creator to Author, etc.)
  - Add new facets based on information in your data

### Sort



- Relevance
  - Based on Primo ranking algorithm

#### Date

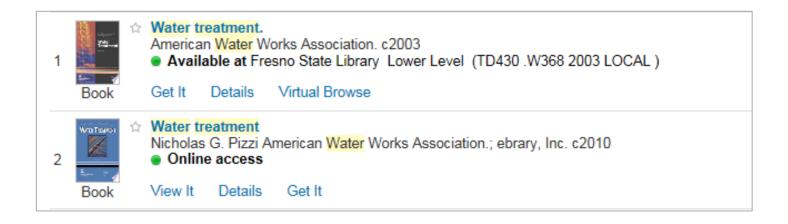
- Popularity
  - Based on click-through statistics
- Author
- Title





### **Brief Results**

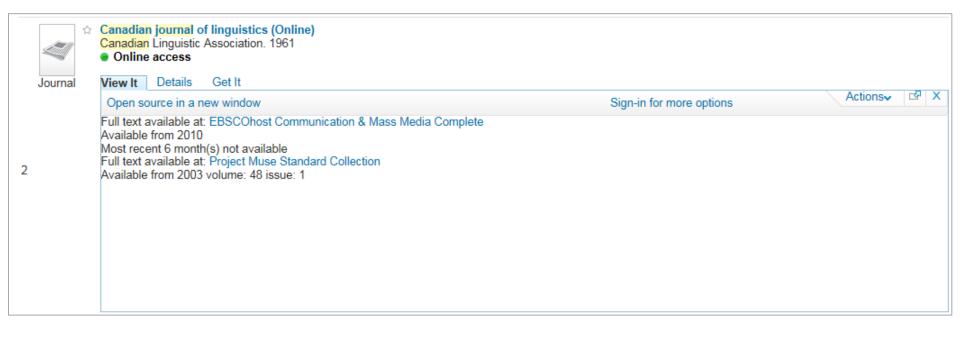
- View It electronic (E) and digital (D) resources
- Get It print (P) resources



 Display of View It and Get It tabs are controlled in Alma

#### **Brief Results – View It tab**

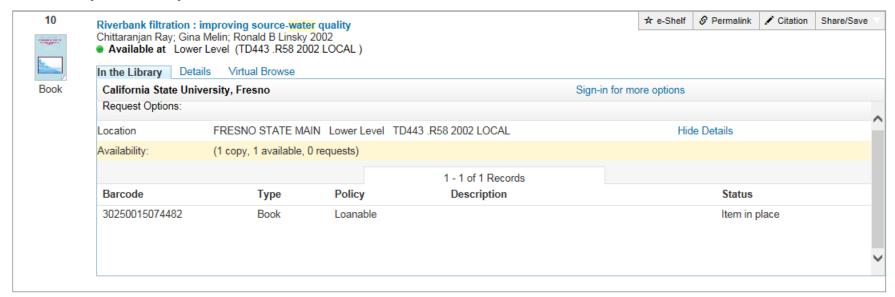
- Provides access to electronic (E) and digital (D) material
- For a single resource, access is supplied directly to the resource
- Multiple resources are listed for the user to select one



#### **Brief Results – Get It tab**

## Provides the following information for each print (P) resource:

- Locations where the title can be found
- Availability of the title
- Request options

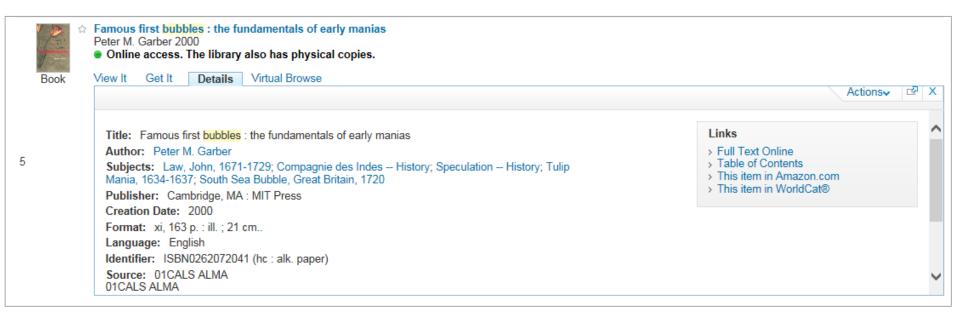


The user is prompted to "Sign-in for more options". Once signed in, user can place a request using options which will display after "Request Options:".

#### **Brief Results – Details Tab**

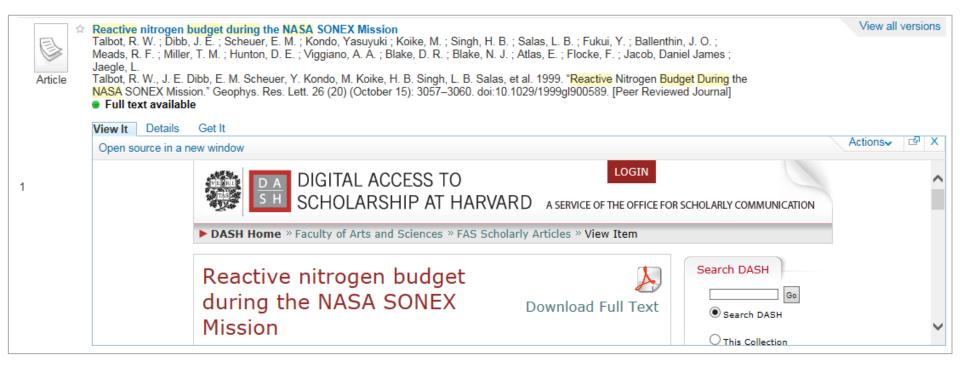
### Provides the following information for each title:

- Detailed information about the resource
- Additional search links (Author, Subjects)
- Links to table of contents, Amazon, WorldCat



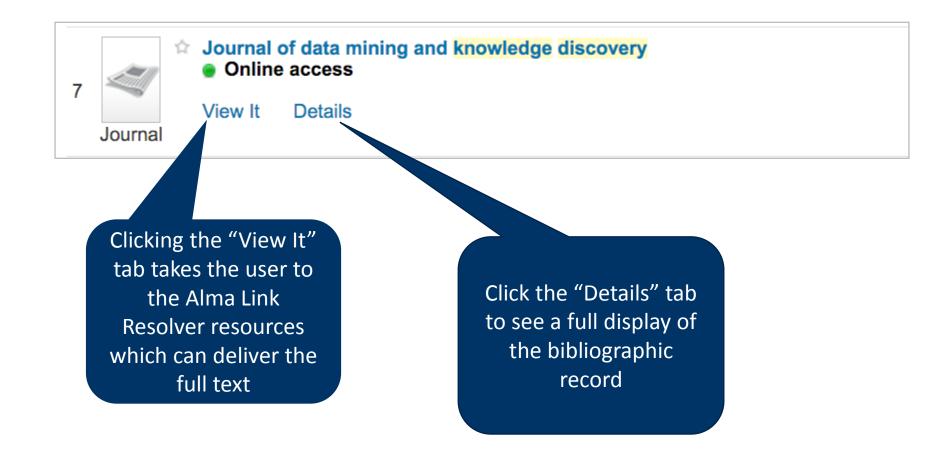
#### **Brief Results – Primo Central**

- Availability statement displays Full text available or No full-text
- Either View It or Get It tab will display depending on availability



# **Brief Results – Online Resources (Alma)**

#### **Brief Record Display**



## **Brief Results – Physical Resources (Alma)**

#### **Brief Record Display**



Click the "Get it" tab to get a list of print locations or when signed in to place a Request

Click the "Details" tab to see a full display of the bibliographic record

Click "Virtual Browse" to get a "shelf-like" list showing other books on the shelf with similar call numbers, similar to call number browse



## **Brief Results – Online Resources (Primo Central)**

#### **Brief Record Display**



ADVANCES IN KNOWLEDGE DISCOVERY IN DISTRIBUTED DATABASES

Pupezescu, Valentin 2015

The International Scientific Conference eLearning and Software for Education, Vol.1, pp.311-319

Full text available

View It Details

Clicking the "View It" tab takes you to a menu of resources or else directly links you to the document text

Click the "Details" tab to see a fuller display of the bibliographic record –

Note: the "Source:" field shows the PCI resource index this bibliographic record was retrieved from

## **Brief Results – Online Resources (Primo Central)**

#### **Expand My Results**

Expand My Results

#### Show only

Full Text Online (269,553) Peer-reviewed Journals (147,654) In the Brief Record Left Column, check "Expand My Results" to see additional "No full-text" available citations in the results list

#### **Brief Record Display**

Knowledge discovery in task-oriented dialogue Wanderley, Gregory Moro Puppi; Tacla, Cesar Augusto; Barthès, Jean-Paul A.; Paraiso, Emerson Cabrera

Expert Systems With Applications, 15 November 2015, Vol.42(20), pp.6807-6818 [Peer Reviewed Journal]

questionnaires. 7 Conclusions and future work Knowledge discovery aims to extract... unknown knowledge from large amounts of data is known as Knowledge

No full-text

Article

Get It Details

If any additional resources had been available, they would be found in this PCI record "Get It" tab label

Click the "Details" tab to see a fuller display of the bibliographic record – Note: the "Source:" field shows the PCI resource index this bibliographic record was retrieved from

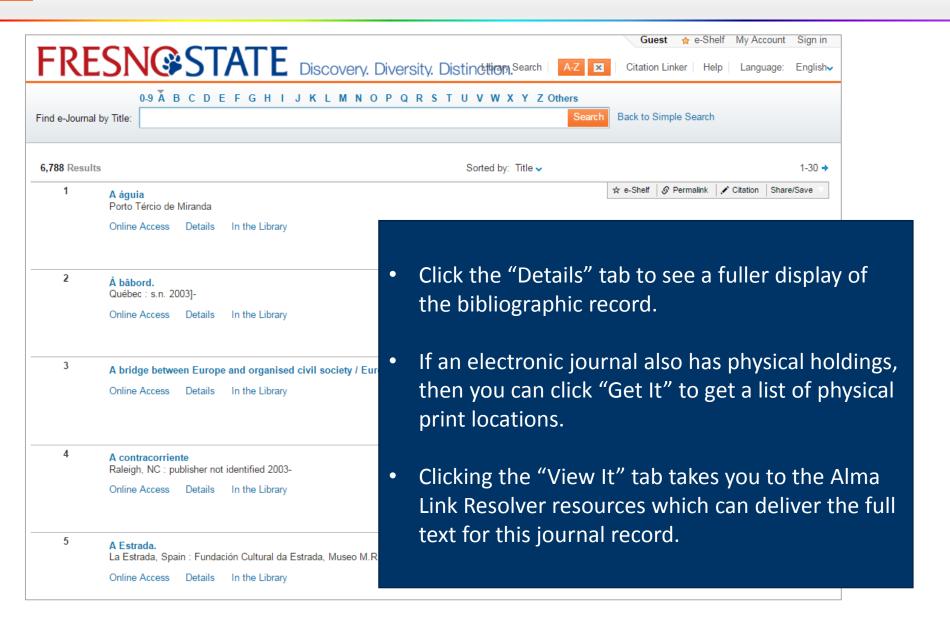
## **Brief Results – Configuration Options**

 Ex Libris implements default tabs and provides instruction on configuring View It and Get It tabs in Alma

#### CalState can:

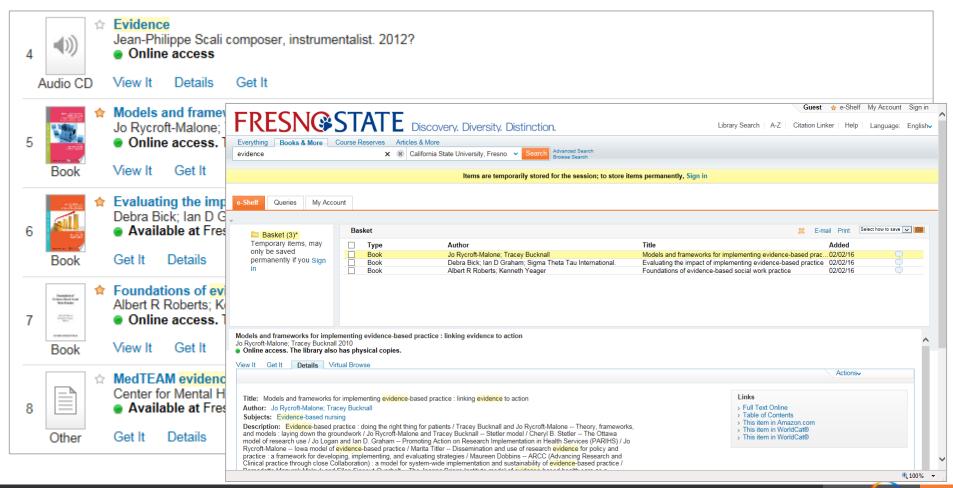
- Reorder tabs (scopes in the new UI)
- Change tab labels (scope labels in new UI)
- Add or adjust fields for display in Details tab

#### **A-Z List**



#### E-Shelf

- Authentication provides:
  - Personalization features
  - Personalized ranking for searching





# **Primo Central**



# Primo Central – Keep in Mind

- Primo Central contains bib citation records (i.e. serves as index with URL's to the
  documents in the Primo "Details" tab), Alma delivers the full text of the documents.
   When you activate a resource in PCI, you are turning on that PCI resource's index.
- Primo Central uses an institutional holdings file from Alma Uresolver to determine what your subscription resources are (in other words, your PCI resources may be "Available" or "No full-text" depending on what coverage dates are authorized by Alma Electronic Collection Portfolio records).
- The source of the bib citation record (i.e. "Details" tab Source field) may not always be where you access full text (i.e. "View It" tab showing Alma resources).
- The resources in the PCI Activation Wizard may not directly reflect the collections you subscribe to.
- Bib citation records that show in the Primo Central results are ones you have full text access to. Use "Expand My Results" option for "No full-text".

#### Primo Central – Availability Using Institutional Holdings File

Primo Central Index resources which your institution has activated are compared by Primo to the Alma Institutional Holdings file built from the various Electronic Collection Portfolios which have been established, with subscription ranges, to determine if a given article from PCI is available.

#### How Primo Central Works - Institutional Holdings File

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

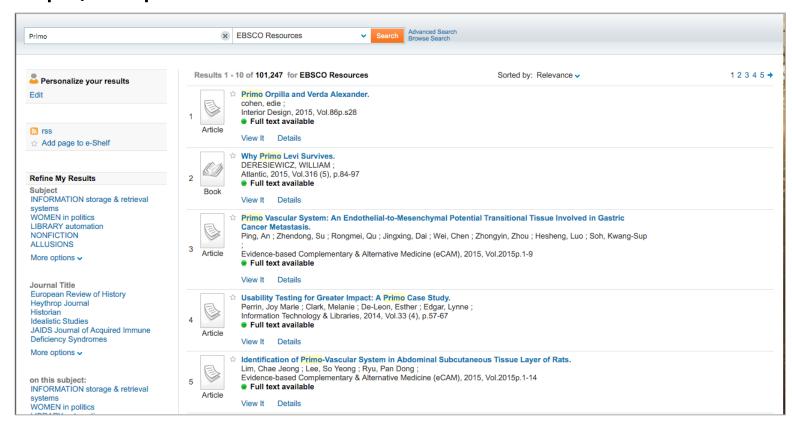


# **EBSCO API**



#### **EBSCO API**

- The EBSCO API Plug-In is configured for relevant institutions
- The EBSCO API has been added as a separate scope/dropdown



## EBSCO API – Keep in Mind

- Though Primo Central doesn't have EBSCO collections, it does contain many of the publications available through those collections.
- The metadata we receive from EBSCO is limited and cannot be enriched on our end.
- PCI and EBSCO results cannot be de-duplicated.
- Sorting is not available when EBSCO is configured in its own scope
- However, the default setup for the EBSCO API uses a separate search scope rather than blending the results with the other resources in the "Everything" search because:
  - A blended search scope which includes EBSCO API data would suppress all facet counts from the display, due to the way EBSCO data is supplied without frequency counts.
  - When searching facets, and using the "More Options" link to get the "Refine Search" light box, the "Exclude" option is unavailable.

### EBSCO API – Keep in Mind

Knowledge Center Article: Search Tips for EBSCO Adaptor in Primo <a href="http://knowledge.exlibrisgroup.com/Primo/Knowledge Articles/Search Tips for EBSCO Adaptor in Primo">http://knowledge.exlibrisgroup.com/Primo/Knowledge Articles/Search Tips for EBSCO Adaptor in Primo</a>

#### **Question:**

Trying to test the EBSCO API using known items that are loaded into the catalog or SFX. When searching just the EBSCO API in Primo, can't find the items. What are some search tips for the EBSCO API?

#### **Answer:**

- EBSCO built the API so EBSCO search logic applies rather than Primo.
- Tip 1: EBSCO interprets multiple words as a phrase while Primo inserts AND between terms.
  - Search: Shakespeare Hamlet becomes 'shakespearehamlet' in EBSCO reducing the likelihood of finding results.
- Tip 2: EBSCO uses single quote rather than double quote marks. Primo can use either.
- Tip 3: EBSCO and Primo can both use Boolean connectors AND, OR, NOT. These must be in all caps.
- Tip 4: Using Primo Advanced Search and training patrons to put single terms or phrases in each line will increase results in EBSCO API searches.
- Summary: Likelihood of success is increased by using Advanced Search or using single quotes for phrases and inserting UPPER CASE Boolean connectors (AND, OR, NOT) between search terms.

#### &showPnx=true

• In Primo FE, click on 'open this item in a new window' icon:



- Append 'showPnx=true' to the URL
- Confirm recordid:
- <control>
  <sourcerecordid>991017132679702907</sourcerecordid>
  <sourceid>01CALS\_ALMA</sourceid>
  <recordid>01CALS\_ALMA991017132679702907</recordid>
- You can view just the PNX record from the Front End
- With the recordid, you can also compare the Primo PNX record to the Alma source record via the PNX Viewer in the Back Office (Publishing > PNX Viewer > enter recordid > Go > View PNX > Compare to Source Record)



## Next steps – California State University

#### Complete configuration workbook:

- Review Alma data in Primo
- Review institution and view settings and fill in institution sheet
- Consider any fields not currently in the PNX record and fill in consortium sheet (refer to &showPnx=true slide)
- Institution: tentatively due August 5, 2016 (workbook will be sent via Salesforce case; ExL will compile responses and send to Discovery Working Group via separate Salesforce case)
- Consortium: tentatively due August 19, 2016 (Discovery Working Group will attach completed workbook to Salesforce case)

# Next steps – Ex Libris

- Make adjustments to normalization rules (ongoing)
- Apply changes from configuration workbook (due September 30, 2016)
- Authentication (ongoing)
- Provide full BE access (due September 30, 2016)
- Schedule new UI handoff (TBD)
- Send current and new UI zip files for each view (TBD)



# Questions?



