Primo Options

ODIN Work Day April 10, 2018

Lynn Wolf

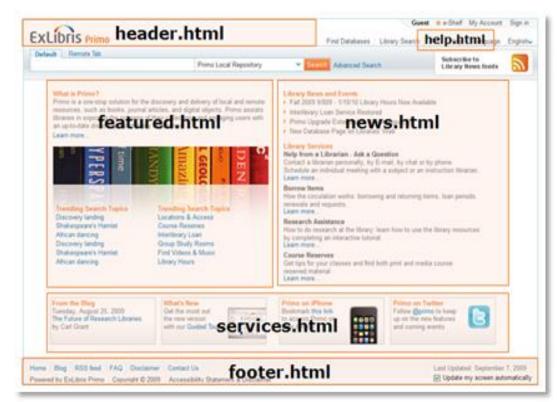
Overview

We will revisit some of the basic configuration options available to your library such as:

- Home page
- Search box
- Search limiters
- Search results
- Brief results
- Full results

Front End Views Home Page Tiles

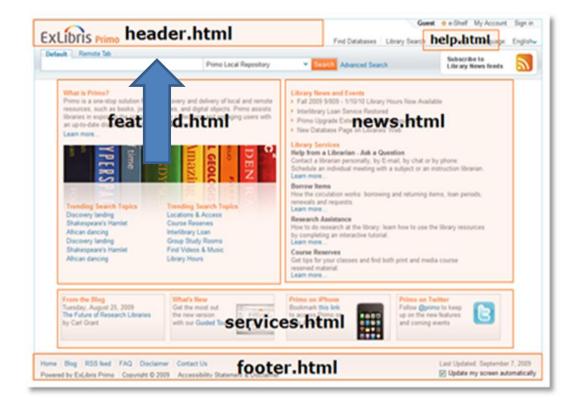
 Each view has a Home Page which serves as the user interface and presents basic information, links, and search box.



header.html

Typically this will be the library's logo with a clickable link to their Library Home webpage.

If your library has implemented a new logo, you will need to let us know so we can get it updated.



Header examples

Grand Forks Public Library

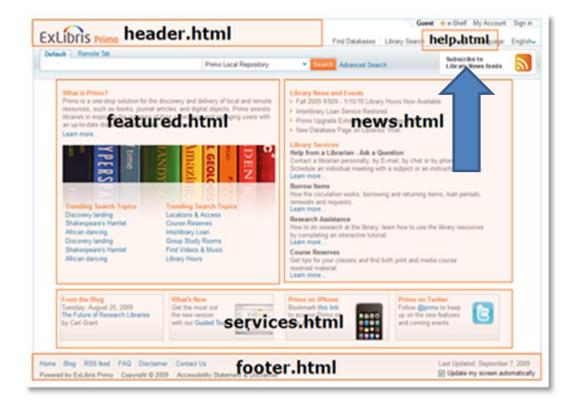
North Dakota State College of Science





help.html

This section can contain links for New Search, Journal List (connects to SFX a-z list), Library Home, Contact or Help. Some libraries have also added links to pages they maintain locally such as a database list, How-To Guides, or Search Tips. These links can be defined to either open in the current or a new window.



Help examples

Dickinson Area Public

New Search, Library Home and Help

Bismarck State College

Includes several locally hosted links

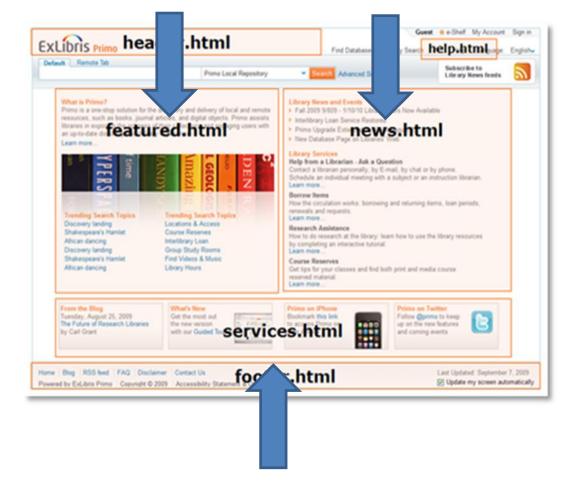
New Search Library Home Help

 New Search
 E-Resources
 Databases
 Course Reserves
 How-To-Guides
 Library Home

 Central Dakota Library Network
 WorldCat
 BSC Library Delicious Bookmarks
 Help

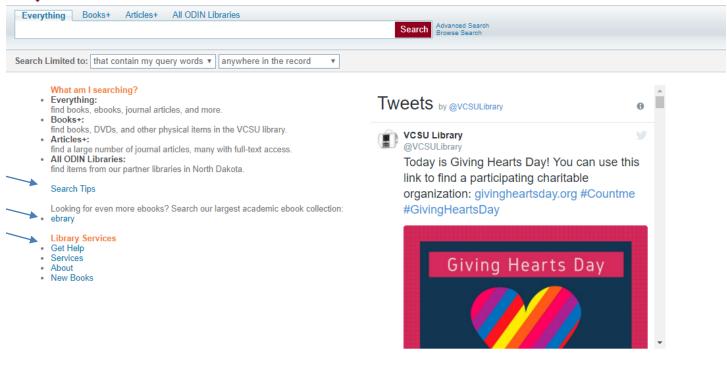
featured.html news.html services.html

When we first implemented, these areas were left blank. Since that time, Jonathan has worked on preparing panel option examples on SANDBOX. He has worked with Valley City State University to implement on **PRODUCTION.**





New Search | Find Journals | Research Guides | Databases | Course Reserves | Search Tips | Language: English



 Home
 FAQ
 Contact Us
 Email Us

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View for Valley City State University

The featured.html area explains content for each tab, links to Search Tips, ebrary content and other library services. News.html is linked to their Twitter feed.

Tile options

Other tile options could include:

- Library address
- Library hours
- Link to Facebook page or Blog
- Link to various resource pages located on your local servers
- And much more!

Mayville State University		New Search	Guest ☆ e-Shelf My Online Resources Course Reserves Libr
Everything B-Q Library Catalog On	ine Resources All ODIN Libraries	Search Advanced Search Browse Search	
Search Limited to: that contain my query w	rords 🔻 anywhere in the record 🔹		
 All ODIN Libraries: find items from our partner libra Search Tips 	es-Quanbeck Library ticles, many with full-text access.	Library Address: Mayville State University Library 330 Third Street. NE Mayville, North Dakota 58257 Phone: 800-437-4104 Library Hours: Fall and Spring Semesters - Cl Monday-Thursday, 8:00 a.m 1 • Friday, 8:00 a.m 4:30 p.m. • Sunday, 6:00 p.m 10:00 p.m.	losed Holidays 0:00 p.m.
Library Services Home Page Education and Innovation Centu- Information Technology Service Office of Diversity and Inclusion Writing Center	S	Summer Hours - Closed Holid Monday-Friday 7:30 a.m 4:00	
Find Us on Facebook Facebook Link	Multimedia Resources Find new digital items with our Search Link	Resources By Division Find a categorized list of resources for each division of the library Link	Video How-Tos Videos that will show you how to use the library and its resources. Link

footer.html

Most libraries keep it simple but options could include:

- Home
- Contact Us either directed to library's contact page or set up to create an email to library
- FAQ or other local server pages
- Link to Facebook page or Blog
- And much more!



Comparison of Home Page

Leach Public Library – few options in help and footer

Bismarck State College – more options especially in help area

	Guest 🏫 e-Shelf My Account Sign in
Leach Public Library	New Search Journal List Library Home Help Language: English
Leach Public Library Catalog Articles and Newspapers All Resource	s All ODIN Libraries
	Search Advanced Search
earch Limited to: that contain my query words anywhere in the record	•
Home Contact Us	Update my screen automatically
Powered by ExLibris Primo Convright © 2012	



Overview

We will revisit some of the basic configuration options available to your library such as:

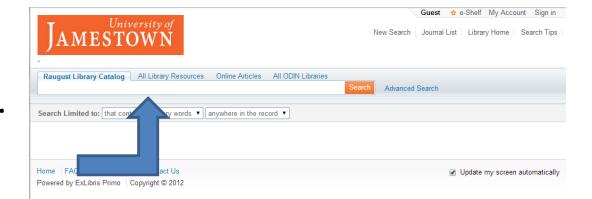
- Home page
- Search box



- Search limiters
- Search results
- Brief results
- Full results

Search Box

Allows patron to enter search terms.



Scopes – Data Building Blocks

- A search scope groups records so that a search can be restricted to only those records.
- Search scopes can consist of:
 - Individual libraries
 - Individual sublibraries
 - Collection from remote data source (such as ContentDM or DSpace)
- Each tab within a view can have one or more scopes

Format options for a search box -- basic search, multiple scopes (dropdown), multiple tabs or combination of scopes and tabs. Most libraries are using either the Multiple Scopes or Multiple Tabs option.

Figure A: Basic Search

Search

Figure B: Multiple Scopes

Primo Local Repository	×	Search
Primo Local Repository Library Catalog Remote Scope		

Figure C: Multiple Tabs

Everything	Remote Resources	
		Search

Example of Multiple Scopes: ODIN view – dropdown contains each ADM as well as all our ALEPH libraries



	All ODIN Libraries - Books & More 👻 Search	Advanced Search
Home FAQ Contact Us Powered by ExLibris Primo Copyright © 2012	All ODIN Libraries - Books & More Books, Articles & More Articles & More Altru Medical Library Angus L. Cameron Medical Library Beach School Libraries Bismarck State College Bottineau County Public Library Bottineau Public Schools	Advanced Search
	Bowman Regional Public Library Carrington City Library	-

Example of Multiple Tabs: North Dakota State Library has one tab for local (ALEPH) records, one tab for Primo Central Records and one tab to search All ODIN Libraries

North Dakota State Library	
North Dakota State Library Catalog Articles All ODIN Libraries	
1	Search
Search Limited to: that contain my query words ▼ anywhere in the record ▼	

Example of combination: Minot State includes a dropdown in Books+ tab. The other tabs do not contain dropdowns.



Search Books+ Articles+			
	MSU Library Catalog 🗸	Search	Advanced Search
	MSU Library Catalog		
Search Limited to: that contain my query words	All ODIN Libraries		

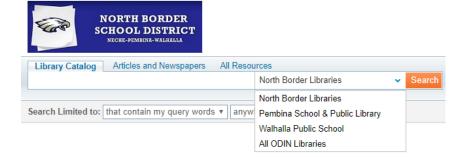


Search Books+ Articles+		
	Se	arch
Search Limited to: that contain my query words v anywhere in the record	Ŧ	

This combination can useful when there are sublibraries --

Such as North Border Libraries with Pembina and Walhalla Schools

... or Northwood School and City Libraries



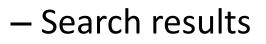


Northwood School and City Library Articles & Newsp	apers All Resources All ODIN Libra	aries
	Northwood School and City Library \checkmark	Search
	Northwood School and City Library	
Search Limited to: that contain my query words v anyw	Northwood Public School Library	
	Northwood City Center Library	

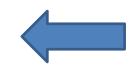
Overview

We will revisit some of the basic configuration options available to your library such as:

- Home page
- Search box
- Search limiters



- Brief results
- Full results



Search Limiters

Allows pre-filter of search results.

Precision operator allows limiting search: -- that contain my query words -- with my exact phrase

-- starts with

*			Guest	🏫 e-Shelf	My Account	Sign in
VALLEY CITY	New Search Journals Researc	h Guides Library Home	Course Reserves	Search Tips	Language:	English <mark>√</mark>
STATE UNIVERSITY						
Everything VCSU Library Catalog	Articles+ All ODIN Libraries					
		Search	Advanced Search			
Search Limited to: that contain my query	words 🔻 anywhere in the record 🔻					
Home FAQ Contact Us						
Powered by ht © 2	2012					

Search Limiters

The second prefilter option involves limiting within certain fields.

Most views have filters to limit search by:

- Anywhere in record (default)
- In the title
- As author/creator
- In subject

With some views also adding:

- ISBN
- ISSN
- Call Number
- Collection
- Series title



Search Limiters:

BSF - No search limiters

DIP – multiple Search Limiters



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Advanced Search screen can contain multiple search lines and multiple options for each line

									Guest	🏫 e-S
State Co	Region		New Search Journal List			ODIN Home		me H		
ake Region College Library	Articles and More	All Resources	All ODIN Lib	oraries						
Any contains 	•			Publication Date:	Any ye	ear			,	•
Any Any 	▼			Material Type:	All iter	ns				•
				Language:	Any la	nguag	je		,	•
				Start Date:	Day	•	Month	•	Year	
				End Date:	Day	•	Month	•	Year	

Advanced Search Material Types

Most libraries have their Advanced Search Material Type contain the options to the right.

However this can be customized for your library for both content and order listed.

Media Type

All Items Archives/Manuscripts AV Materials Books Dissertation/Thesis Journals/Serials Maps Microforms Online/Computer Resources Scores Sound Recordings Videos/DVDs

Advanced Search Language

Many libraries have their Advanced Search Language options set to contain the ones on the right – English, Spanish, French, and German.

However this can be customized for your library for both with expanded content depending on your patron base and the order in which they are listed.

all_items
eng
spa
fre
ger

Overview

We will revisit some of the basic configuration options available to your library such as:

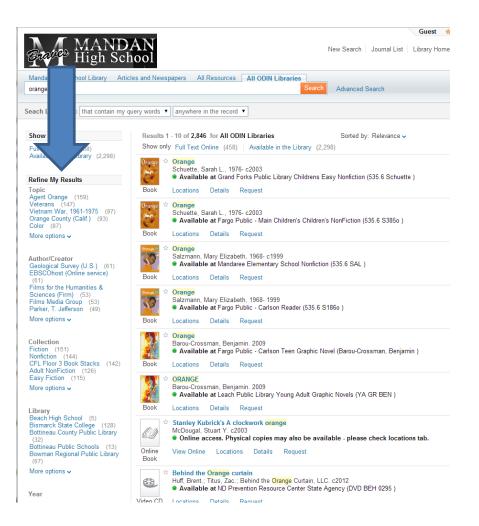
- Home page
- Search box
- Search limiters
- Search results
- Brief results
- Full results



Search Results

- Facets intended to help users refine results list
- Brief Results Tab Labels enables patron to find Locations, View Online, see Details, or Request the item
- Details Tab contains specific fields from the record

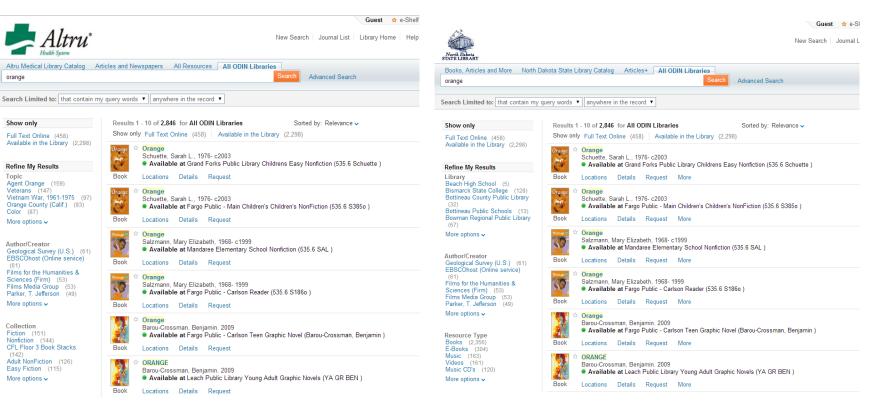
Facets



Facets and Their Order Can Be Customized

GFH – default list of facets include Topic, Author/Creator, Collection, Library, Year, Resource Type and Language

NDS – facets order and content modified moving Library to top of list and including Genre/Form, and Classification LCC



Facet Lists

Facets can be customized for the number of lines to display before the "More options" link.

Most views display 5 per facet however we can specify different values for each facet.

Refine My Results

Collection Electronic Book (16) Electronic Audiobook (15) Nonfiction (15) Teen Fiction (9) DVD PG (8)

More options v

Resource Type Books (36) Videos - CD or DVD (20) Online Books (16) Digital Audio (15) Audio Books - CD (7) More options ✓

Author/Creator Rowling, J. K (60) GrandPré, Mary (16) Grint, Rupert (15) Dale, Jim (15) Watson, Emma (15) More options v

Facet Result Order

Facets can also be customized for the order in which to display the results before presenting the More options link.

The choices are alpha_numeric (to sort results alphabetically) [–] and by_size (to sort results <u>––</u> according the frequency of occurrence).

Again, we can use different options for different facets.

Refine My Results

Library Bismarck State College (42) Bowman Regional Public Library (59) Carnegie Regional - Grafton (35) Carrington City Library (18) Carrington Elementary School (12)

More options v

Topic

Magic (789) Wizards (773) Potter, Harry (Fictitious character) (760) Hogwarts School of Witchcraft and Wizardry (Imaginary organization) (697) England (616)

More options ~

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Brief Results Tab Labels

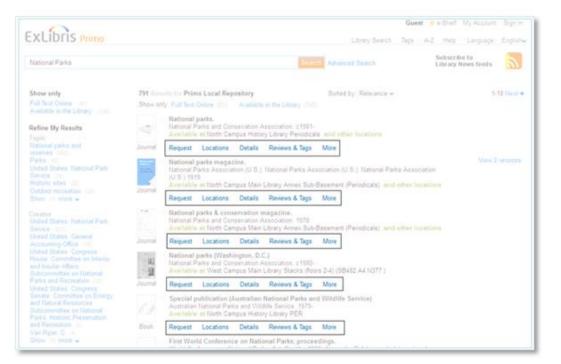
Request – Displays for physical items and opens a new window to the OPAC. Also referred to Find/Request

Locations - Displays physical items

View Online – Displays for online items: opens to full view

Details – Displays full metadata record for all items (a later slide will show example of fields used)

The order of these tabs can be customized for your view.



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Example of Full Results

This is an example of the full results display when you click on title from brief results list.

The lines containing the title, author and date can be customized as well as the order of the tabs (Location, Details, Request).

	New Search	th Journal List ODIN Home Search Tips Language: En
girl from botany bay	😠 All ODIN Libraries - Books & More 🗸	Search Advanced Search Browse Search
The girl from Botany Bay Erickson, Carolly, 1943- ;c2005 Available at UND Chester Fritz Library	CFL Floor 3 Book Stacks (HV6653.B78 E75 2005)	
Locations Details Request		Actions
Ausfralia – Bolany Bay (N.S.W.) – Blog - Biography, Penal colonies – Australia – Publisher: Hoboken, N.J.: John Wiley Creation Date: c2005 Physical Description: 234 p.; 24 cm Language: English Description: A remarkable story of res woman's international travels after she is bornet and manages to find her way hor early 1790s, prisoner Mary Bryant, her h convicts stole a twenty-foot longboat and their captors. They sailed north, all the w treacherous miles in ten weeks- an incr companions were able to convince the le shipwreck, but eventually the truth emer their way to England for execution. In tim admiration. A woman once reviled as a c forgiveness and freedom. In The Girl fro Erickson tells Mary Bryant's remarkable whose impoverished Cornwall childhood imprisonment and exile. Erickson recour with her conviction and death sentence I Wales to serve out her time, one of dozz hundreds of male convicts destined for s From Mary's perilous sea journey to Bod penal colony, to the risky escape to the I England during which Mary's husband heroic. With the dramatic narrative skill toompanions to life in compelling detail. / storms, near drownings, severe hunger, and salt spray that left the convicts with When she finally landed in England and in her own defense. No one had the hea for her crimes? Impressed by Mary's stu		g n's ng a on ng rolly t t t he t e t o t o t o t o t o t o t o t o t

Details Tab

Most views are set up to default to the Details tab when clicking on the title.



There is also an option to go directly to the Locations tab.

i <mark>rl from Botany Bay</mark> op, Carolly, 1943- ;c2	005					
	er Fritz Library CFL Floor 3 E	ook Stacks (HV6653.	B78 E75 2005)			
cations Details Re	equest					Actions
vailability and location						
UND Chester Fritz L	ibrary	CFL Floor 3 Boo	ok Stacks	(HV6653.B78 E75 2	005)	Available
Location		Call Number	Description	Status Barcode	ltem Type	Request Options
 UND Chester Fritz Stacks 	Library CFL Floor 3 Book	HV6653.B78 E75 2005		Available3310001987		Sign in to request
Location: Call Number: Status: Barcode: Item Type: Item Status: Copy Number:	UND Chester Fritz Librar HV6653.B78 E75 2005 Available 33100019874295 Book 30 Days 1	y CFL Floor 3 Book St	tacks			

Details Tab Fields

To the right is the default list of what fields are defined to appear within the details tab.

** The fields will be displayed if they are present in the bib record.

As with the facets, you may specify which fields and what order you want these fields to display.

Field to display in the full results

Field Vernacular title Title Variant Title Creator Added Author Subject Publisher Creation Date Physical Description Language Language Note Edition Description Is Part Of Series Series Statement Earlier Title Later Title Link Identifier Rights **Record Source** Relation Performer Notes Access Restrictions System Details Added Title Has supplement Issued with

Example of same title cataloged by different libraries

ORANGE

Barou-Crossman, Benjamin. 2009 Available at Leach Public Library Young Adult Graphic Novels (YA GR BEN)

Locations

Details Request

Title: ORANGE Author: Barou-Crossman, Benjamin. Publisher: TOKYOPOP Creation Date: 2009 Language: English Identifier: ISBN9781427814630 Record Source: ODIN ALEPH

Back to results list

Orange

Barou-Crossman, Benjamin. 2009 Available at Fargo Public - Carlson Teen Graphic Novel (Barou-Crossman, Benjamin)

Locations Details Request

Title: Orange

 Author: Barou-Crossman, Benjamin.

 Subjects: Teenage girls -- Comic books, strips, etc; Suicidal behavior -- Comic books, strips, etc;

 Interpersonal relations -- Comic books, strips, etc; Graphic novels; Comic books, strips, etc; Young adult fiction

 Publisher: Los Angeles, Calif. ; London : Tokyopop

 Creation Date: 2009

 Physical Description: 1 v. (unpaged) : chiefly col. ill. ; 26 cm..

 Language: English

 Language Note: Translated from the Chinese.

 Description: "Her name is Orange, she's a young girl in high school, coming of age in the heart of the city.

 And she has decided she has nothing to live for. Not her shallow friends. Not her parents. Not school. Not even the empty promise of love. Her head filled with morbid fantasies of suicide, Orange finds herself standing at the edge of her rooftop when the drunken, enigmatic young man, Dashu, enters her world, changing it forever" -- p. [4] of cover.

Identifier: ISBN9781427814630 (pbk.);ISBN1427814635 (pbk.);OCLC(OCoLC)244067327 Record Source: ODIN ALEPH

Back to results list

Details Tab Links

Many views have Links in the Details tab.

Link options include:

- Table of contents
- Resource
- Review
- Google Book
- Analinks
- MARC Record

depending on contents of record and view configuration.



Publisher: Hoboken, N.J. : John Wiley & Sons

Physical Description: 234 p. ; 24 cm.

Creation Date: c2005

Language: English

Links
> Table of contents

Actions

- > Publisher description
- MARC Record

Details Tab Actions

There is a dropdown for the Actions list.

Patrons can use these options to:

- Add to e-shelf
- E-mail
- Print
- Generate Permalink
- Create Citation
- Export bib information

```
The girl from Botany Bay
Erickson, Carolly, 1943- ;c2005
Available at UND Chester Fritz Library CFL Floor 3 Book Stacks (HV6653 B78 E75 2005 )
Locations Details Request
                                                                                                                                      Links
  Title: The girl from Botany Bay
                                                                                                                                     > Table of contents
  Author: Erickson, Carolly, 1943-
  Subjects: Bryant, Mary, 1765-; Thieves -- England -- Cornwall (County) -- Biography; Exiles --
                                                                                                                                     > Publisher descrip
                                                                                                                                     > MARC Record
 Australia -- Botany Bay (N.S.W.) -- Biography; Women prisoners -- Australia -- Botany Bay (N.S.W.) --
Biography; Penal colonies -- Australia -- Botany Bay (N.S.W.) -- History
  Publisher: Hoboken, N.J. : John Wiley & Sons
  Creation Date: c2005
 Physical Description: 234 p.; 24 cm.
  Language: English
  Description: A remarkable story of resilience, heartbreak, and ultimately triumph follows a young
  woman's international travels after she is deported to Botany Bay in Australia for stealing a woman's
  bonnet and manages to find her way home again after a long ordeal. On a moonless night in the early
  1790s, prisoner Mary Bryant, her husband William, her two small children, and seven other convicts
```



Actions~

Print

Permalink

Citation

EasyBib EndNote

Add to e-Shelf E-mail

 \square

4

69

What else can 10000

New Records Facet

The "New Records" facet allows users to display records that have been added over predefined intervals:

New last week (7 days) New last month (30 days) New last 3 months (90 days)

Here is a search from the ODIN view for DVDs found in the Grand Forks Public Library.

ODIN Advanced Search Grand Forks Public Library ς. Browse Search Results 1 - 10 of 13,356 for Grand Forks Public Library Personalize your results Show only Available in the Library (11,746) Full Text Online (70) DVD family Christmas sing-a-long! Johnston, Stephen.: DVD International.: Bibles on DVD (Firm) :c2005 Show only Available at Grand Forks Public Library Childrens DVD (783.65 DVD) Available in the Library (11,746) Video CD Locations Details Request Full Text Online (70) or DVD Bleach. DVD set eleven, Episodes 168-179 Kubo, Tite. Abe, Noriyuki.; Terebi Tåokyåo, Kabushiki Kaisha.; Dentsåu.; Piero, Kabushiki Kaish **Refine My Results** Available at Grand Forks Public Library Adult DVD (SERIES ANIME Bleach) DVD disc (11,614) Video CD Locations Details Request Feature films (1,081) or DVD Video recordings for the hearing impaired Holy Bible, King James version, New Testament on DVD Friendship (789) Johnston, Stephen.; DVD International. ;2003 Man-woman relationships (730) Available at Grand Forks Public Library Adult DVD (220.52 H747) More options ~ Video CD Locations Details Request or DVD Resource Type Bleach, DVD set twelve, Episodes 180-193 Videos - CD or DVD (12,356) Kubo, Tite. Abe, Noriyuki.; Dentsåu.; Piero, Kabushiki Kaisha.; VIZ Media.; Warner Home Video Other (429) Available at Grand Forks Public Library Adult DVD (SERIES ANIME Bleach) Video BLU-RAY Discs (306) Music CD's (104) Archives Locations Details Request Books (65) Video Cassettes (37) Bleach. DVD set sixteen, episodes 230-242 Kubo, Tite. Abe, Noriyuki.; Shūeisha.; Shonen Jump (Firm); Piero, Kabushiki Kaisha.; Dentsū.; 1 Video Streaming (14) Warner Home Video (Firm) ;2013? Audio Books - CD (12) Available at Grand Forks Public Library Adult DVD (SERIES ANIME Bleach) Online Books (11) Video CD Archives/Manuscripts (10) or DVD Locations Details Request More options ~ Bleach. DVD set fourteen, episodes 206-217 Kubo, Tite. Abe, Noriyuki. Saqisu, Shiro.; Shueisha/Shonen Jump.; Terebi Tåokyåo, Kabushiki k Media.: Warner Home Video (Firm) :2012

Author/Creator

dvd

Edit

Topic

(847)

New Records Facet (cont.)

If you scroll down, the last facet is New Records ...

When More options is clicked under New Records, you see this

Language English (13,235) French (3,028) Spanish (2,966) Portuguese (290) Japanese (167)	Results 1 - 10 of 13,356 for Grand Forks Public Library			
More options V				
Classification LCC P - Language and literature. (63) D - History (general) and history of europe. (10) M - Music. (7) T - Technology . (6)		Refine S	Search Exclude	New Records
H - Social sciences. (5) More options v				New From Last Week (34)
				New From Last Month (111)
Collection			_	
Adult Compact Disc (108) Adult DVD (7,755) Adult Nonfiction (45) Childrens DVD (5,374) Childrens Multimedia (4) Childrens Reference (20) Electronic Books (5)				New From Last 3 Month (190)
More options 🗸				
New Records New From Last Week (34)				

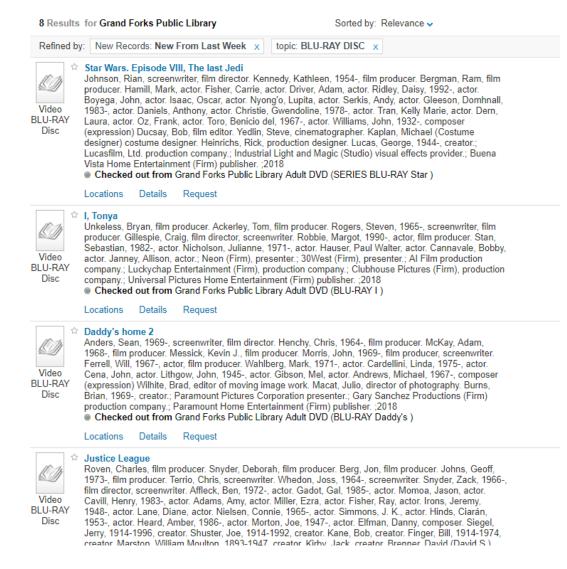
More options ~

New From Last Month (111) New From Last 3 Month (190)

New Records Facet (cont.)

If I click on **New From** Last Week and further limit the results to BLU-RAY DISC, I can see there are 8 new blu-ray DVDs at the GF Public Library.

I quickly click **Request** to secure my place in line to borrow the material.



Snippets

Snippets are small excerpts from the text that contain the search term used.

Most views do not have this option enabled.

The upper example (ODIN view) does not have the Snippet feature enabled whereas the lower example (UND view) does. ☆ MacLachlan, Patricia. The Boxcar Children Beginning: The Aldens of Fair Meadow Farm.(Children's review)(Brief article)(Book review) Donnelly, Alison School Library Journal, Dec, 2012, Vol.58(12), p.95(1)
 ◆ Full text available
 View Online Details

MacLachlan, Patricia. The Boxcar Children Beginning: The Aldens of Fair Meadow Farm.(Children's review)(Brief article)(Book review)
 Donnelly, Alison School Library Journal, Dec, 2012, Vol.58(12), p.95(1)
 Boxcar Children's journey truly begins. The innocence of... Jessell. 144p. (Boxcar Children Series). Albert... MACLACHLAN, Patricia. The Boxcar
 Full text available
 View Online Details

Snippets (cont.)

Primo allows you to display snippets in search results retrieved from PC Index and remote and local Primo collections. If the following criteria are met, the system displays the snippet for an item:

The search term is found in any of the following fields:

- abstract field in the PNX record
- fulltext field in the PNX extensions (for local and remote collections only)
- **toc** field in the PNX extensions (for local and remote collections only)

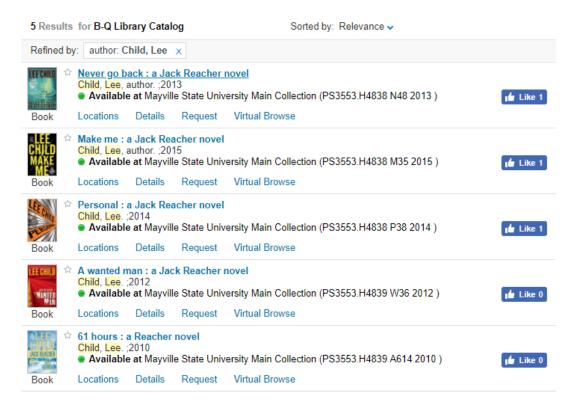
If the search term is not found in the above fields and the **Show snippet if query terms are not found in fields** field has been selected, the system displays the first 160 characters of the highest priority field specified in the Snippet Display Preferences mapping table.

The snippet is 145 to 160 characters in length.

Facebook Sharing

"Enables the Facebook Like button for local Primo and Primo Central records on the Brief Results page so that users can share content with their friends on Facebook"

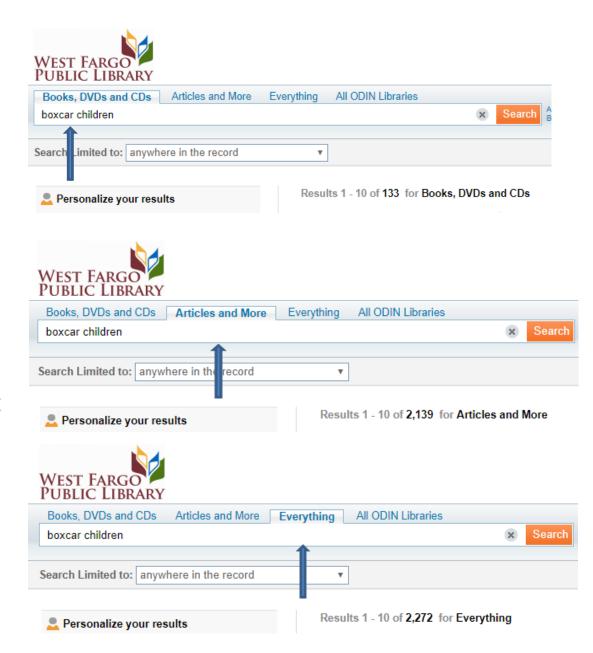
This is enabled for NMY but I did not find anything posted on my Facebook when I liked items.



Auto Search when switching tabs

Many views are enabled to invoke automatic searching when switching tabs.

In the first example, I searched boxcar children. When I did not find item I wanted, I clicked on Articles and More and Primo automatically used that same search term there so I did not have to reenter.





Questions or Comments?

Thank you for attending!

Please make sure to submit a Help Ticket if you have any questions or experience any problems. We cannot try to resolve a problem if we are unaware of it.