PRIMO NEW UI

Brief exploration of the New User Interface (UI) for Ex Libris' Primo Discovery Interface ODIN Work Day – April 10, 2018 Lynn Wolf

SESSION OVERVIEW

This session will introduce you to the look and feel of Primo's New UI. We will touch on:

- Core Principles
- What has remained the same
- What has changed
- Enhancement timeline for 2018
- Possible implementation opportunities.

WHAT IS THE PRIMO NEW UI AND WHY SHOULD I CHANGE?

The Primo New UI was available for general release in August 2016. Some existing Primo functionality was not available in the New UI until the August 2017 release.

The New UI is NOT a new Primo version or a separate Primo instance, but rather a new Front End. Its design is based on user studies and feedback to address the different needs of different types of users.

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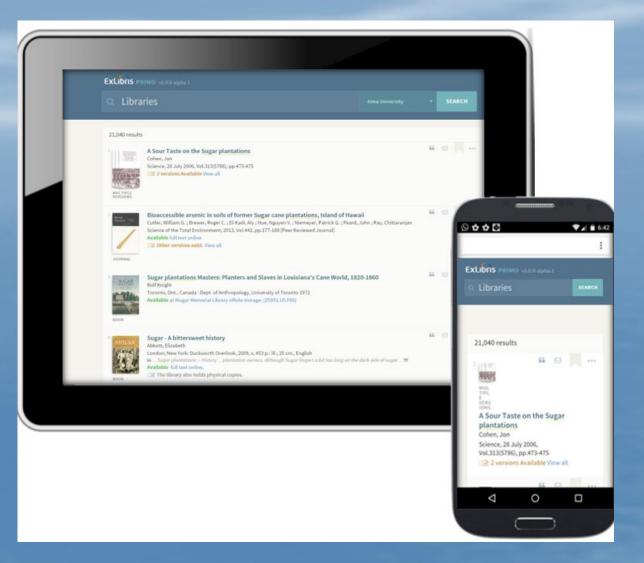
CORE PRINCIPLES FOR NEW UI

- One experience across devices PC, mobile, tablets
- Intuitive design to simplify daily tasks
- Action-oriented design one click to get patrons where they need to go
- Personalization everything tailored to the specific user's needs

 Serendipity – enable users to make discoveries beyond their immediate need

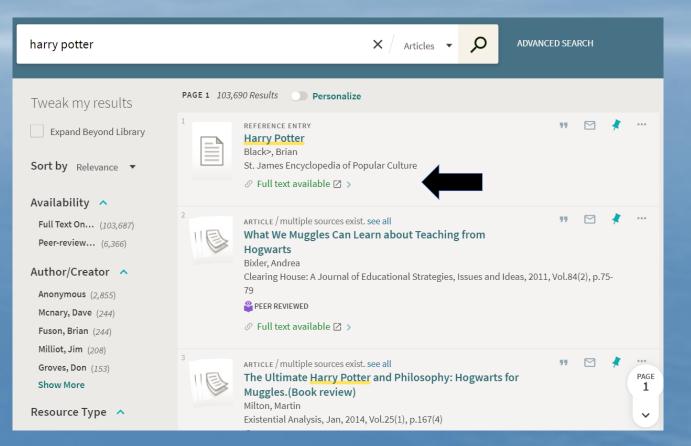
Any device, any time

One of the key advantages of the new UI is the way is displays over mobile and tablet devices, making Primo searches available from any device, any time.



Clear, intuitive design

The interface of the result list is clean, presenting only data that can help the patron easily determine which item to select. If the full text is available, a fulltext link is positioned with the item in the result list.



Gradual **Exposure**

Once the user selects an item, all the available information about it appears.

This process is the essence of "gradual exposure."

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Action menu – one click from result list

Classic UI – patron must go through the Details tab

New UI – patron needs only one click from the result list

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CONSISTENT DISPLAY FOR ALL WORKFLOWS

Classic UI – presented in My Account e-shelf tab

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you Sign in	Book	Child, Lee, author.	Night school : a Jack Reacher novel	04/08/18 🔍

New UI – clicked on Stick Pin icon to go to My Favorites

	My Favorite	s 🗏 …							
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WHAT HAS REMAINED THE SAME?

Since the New UI is a Front End, much of the Primo Back Office functionality has not been changed.

Primo still:

- Harvests records from ALEPH or ALMA
- Uses Norm Rule Set to create PNX records
- Indexes records in same manner
- Authenticate users from same sources
- Make a Real Time availability call to ALEPH/ALMA for item location

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DISCLAIMER:

- The following examples were taken from the NDS new UI view on SANDBOX. The Classic UI view was extracted and just minor adjustments were made so far for this view. It is as close to out-of-the-box New UI as possible.
- Customizations including logo size, colors used, and screen design should be available.

LOOK AND FEEL OF THE LANDING PAGE

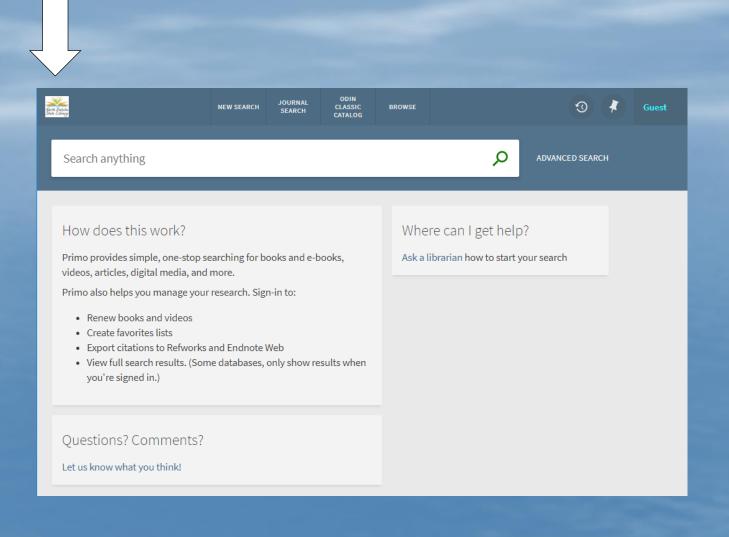
Primo Classic UI

Guest e -Shelf My Account Sign in North Dakota New Search Journal List ODIN Classic Catalog Search Tips North Dakota State Library Catalog Articles All ODIN Libraries I Search Browse Search Browse Search Search Limited to: that contain my query words anywhere in the record Home Ask Reference Contact Us Update my screen automatically Powered by ExLibris Primo Copyright © 2012 Update my screen automatically

Primo New UI

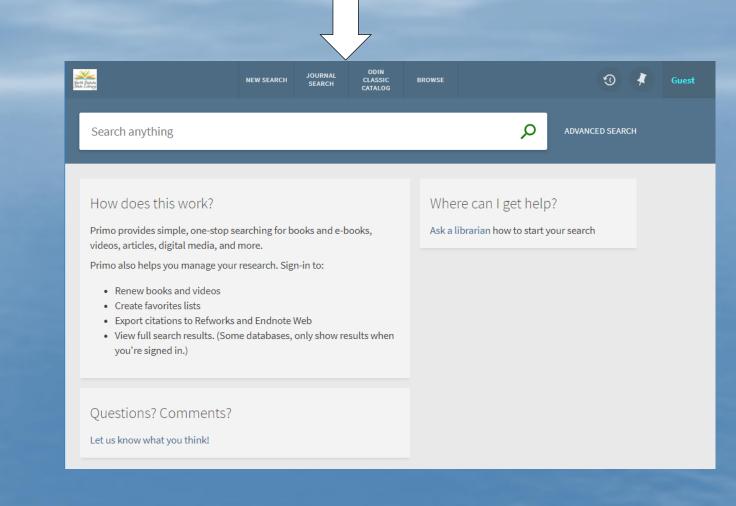
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Questions? Comments	s?						

Let's take a closer look We still have the library logo in the upper left corner. The final logo would need to be a bit larger in size.



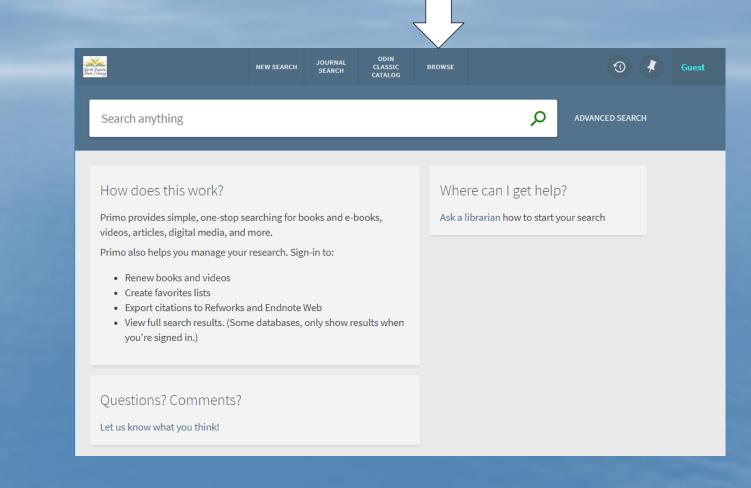
Header has moved

The fields previous located in upper right corner have moved to the center of the header.



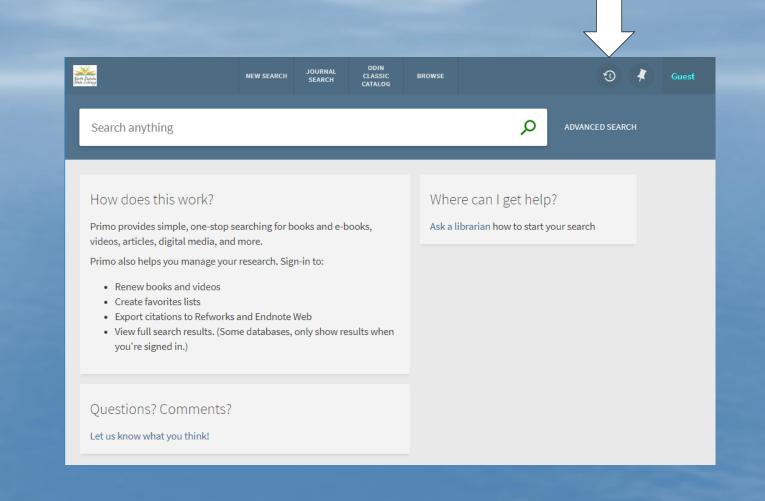
Browse search has moved ...

The browse search is no longer located under "Advanced Search" but moved up to the header bar.

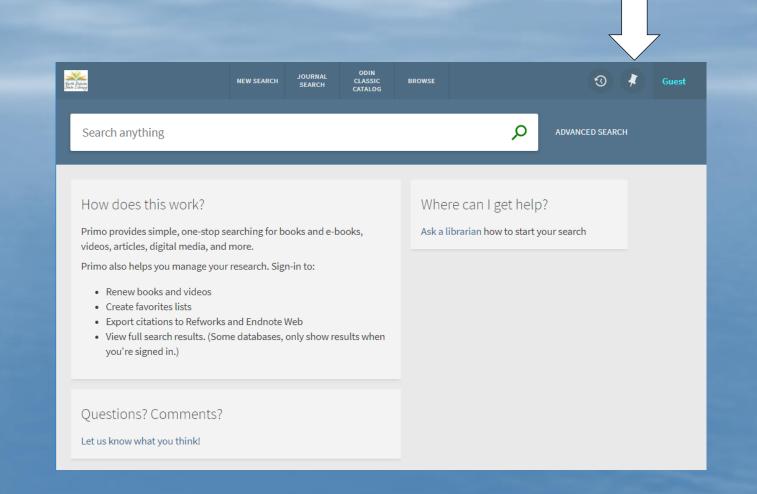


Search history is easily accessible

A symbol indicating turning back time on a clock is used to indicate search history.

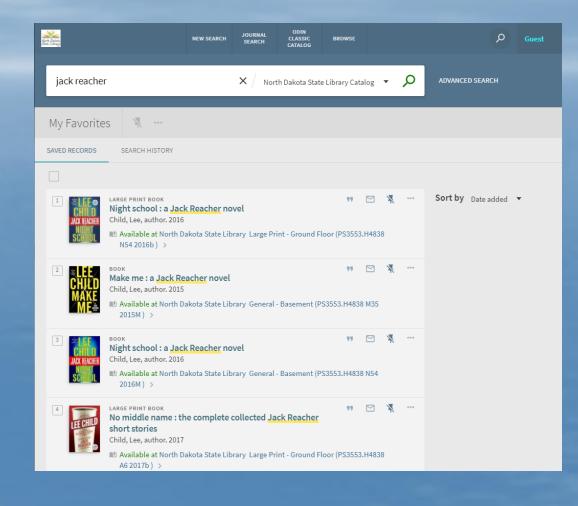


My Favorites is easy to access ... If I had used the push pin shown in item displayed, I can click on the icon in upper right to quickly get to my SAVED RECORDS



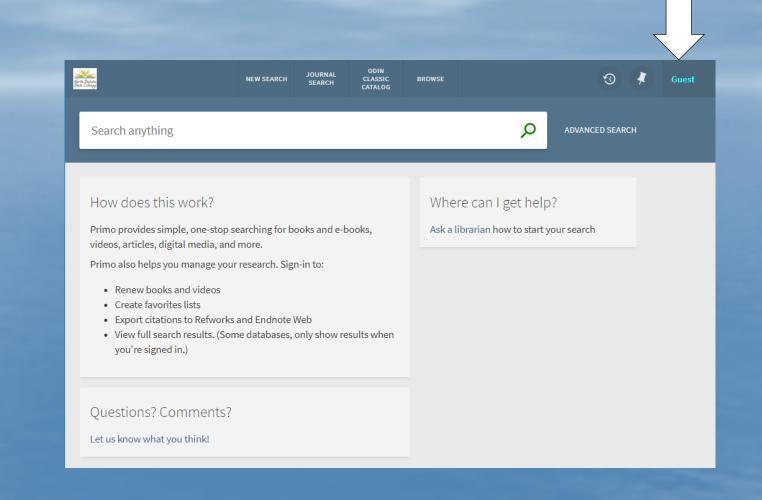
My Favorites Saved Records

This is an example of the saved records from my session. Note the push pin from upper right is no longer displayed. I have option to Sort by: Date added, Title or Author.



GUEST ...

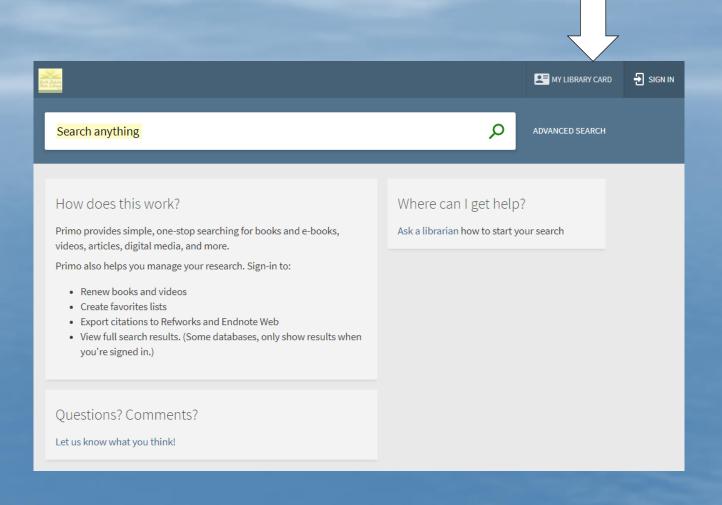
Clicking on Guest will give you options to choose My Library Card or Sign In.



After clicking Guest

The options change to My Library Card or Sign in.

Both choices will ask patrons to login using the familiar login page.



Search box

The search box starts out very simply.

However, once a patron starts to enter a search term ...

North Daksta \odot NEW SEARCH CLASSIC BROWSE Guest CATALOG ρ Search anything ADVANCED SEARCH How does this work? Where can I get help? Ask a librarian how to start your search Primo provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more. Primo also helps you manage your research. Sign-in to: Renew books and videos Create favorites lists Export citations to Refworks and Endnote Web · View full search results. (Some databases, only show results when you're signed in.) Questions? Comments? Let us know what you think!

Search Box

The Search Box now expands as you enter a search term.

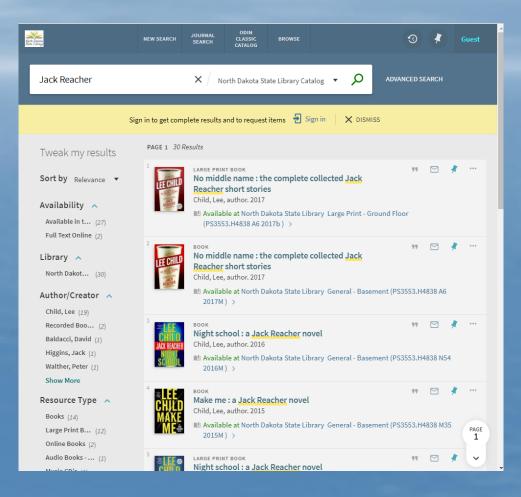
The dropdown presents options that previously were found in the tab configuration.

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Brief Results Page

Each item in the result set is more prominent. The thumbnails are larger and the type of material is now found above the title.

Patrons can generate the citation or send email directly from brief result page.



Full Display Result

When patron clicks on title a new window will open overlaying the brief results screen.

Notice options below thumbnail to jump directly to a section such as Get It.

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Higgins			Short stories >
Walthe		Description	Too much time Second son High heat Deep down Small wars James Penney's new
Show I			identity Everyone talks Not a drill Maybe they have a tradition Guy walks into a bar No room at the motel The picture of the lonely diner
Resour			This pulse-pounding collection marks the first time that all of Lee Child's short fiction starring Jack Reacher has been available in one place. It begins with "Too
Books			Much Time," a brand-new work that finds Reacher in a hollowed-out town in Maine, where he witnesses a random bag-snatching but sees much more than a simple
Large F			crime. "Small Wars" takes readers back to 1989, when Reacher is an MP assigned to
Online			solve the brutal murder of a young officer found along an isolated forest road in Georgia and whose killer may be hiding in plain sight. In "Not a Drill," <mark>Reacher</mark> tries
Audio E			to take some down time, but a pleasant hike in Maine turns into a walk on the wild

Further down the display

All the information under Details is still displayed in an easy to read format.

The information included in Details is customizable to your library's needs.

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X			where he witnesses a random bag-snatching but sees much more than a simple
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North [solve the brutal murder of a young officer found along an isolated forest road in Georgia and whose killer may be hiding in plain sight. In "Not a Drill," <u>Reacher</u> tries
			to take some down time, but a pleasant hike in Maine turns into a walk on the wild
Author			side. "High Heat" time hops to 1977, when Reacher is a teenager in sweltering New
Child, L			York City during a sudden blackout that awakens the dark side of the city that never
í l			sleeps. Okinawa is the setting of "Second Son," which reveals the pivotal moment when young Reacher's sharp "lizard brain" becomes just as important as his muscle.
Record			In "Deep Down," Reacher tracks down a spy by matching wits with four formidable
Baldao			females. Rounding out the collection are "Guy Walks into a Bar," "James Penney's
Higgins			New Identity," "Everyone Talks," "The Picture of the Lonely Diner," "Maybe They Have
Walthe			a Tradition," and "No Room at the Motel." No suitcase. No destination. No middle name. No matter how far <u>Reacher</u> travels off the beaten path, trouble always finds
Show I			him. Feel bad for trouble.
		Edition	First large print edition
Resour		Publisher	New York : Random House Large Print
Books		Creation Date	2017
		Physical Descriptio	n 516 pages (large print) ; 24 cm; large print
Large F		Series	Child, Lee. Jack Reacher novel >
Online		Series Statement	Jack Reacher
Audio E		Language	English
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Still a bit further down ... There is still a Links section as well as a Get It/Request area.

The Location Items area is expandable containing the item information.

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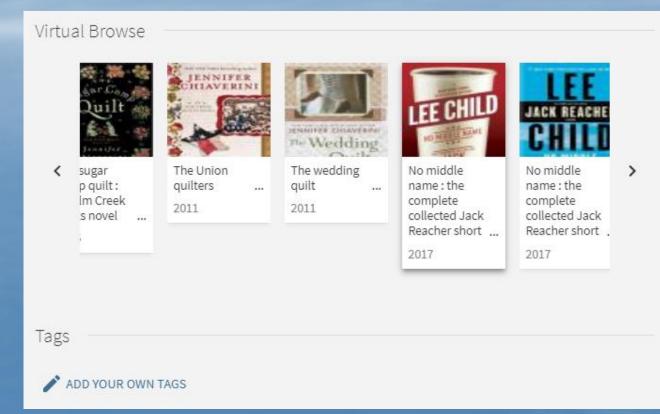
More

Clicking on "Click here for more options" opens a new window for the SFX information.

ODIN Online Dakota Information Network
Source: No middle name : the complete collected Jack Reacher short stories [1-5247-8302-1] Child, Lee
Full text
This article is currently unavailable. Please use interlibrary loan (ILL) or check the holding information.
Holding information
Holdings in ODIN Library Catalog Go
ILL
Request document via ODIN Interlibrary Loan Go
More Options
© 2018 SFX by Ex Libris Inc. <u>Cookie Policy</u> <u>CrossRef</u> Enabled

And finally

Virtual Browse and Tags complete the Full Display screen.



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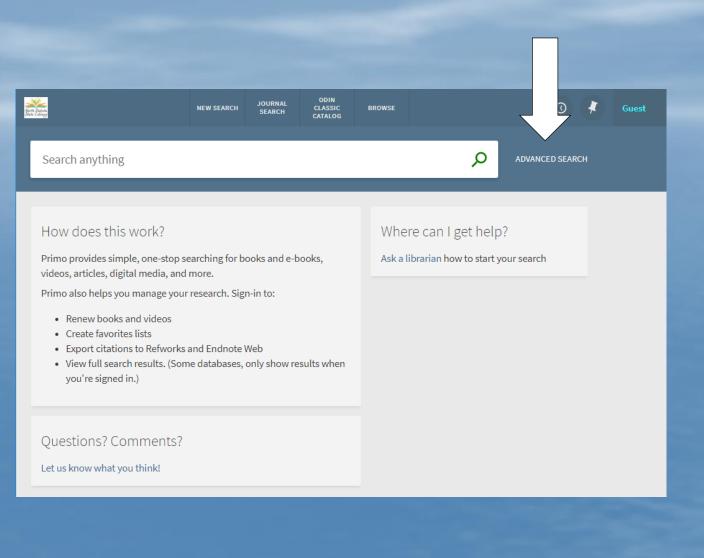
Classic UI – available in upper and lower right corners

Personalize your results	Results 1 - 10 of 30 for North Dakota State Sorted by: Relevance 12.3 + Library Catalog
	Show only Available in the Library (25) Full Text Online (2)
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Available in the Library (25) Full Text Online (2)	Floor (PS3553.H4838 A6 2017b) Large Print Locations Details Request Virtual Browse Book
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Walther, Peter (1) More options ~	Available at North Dakota State Library General - Basement (PS3553.H4838 N54 2016) Available at North Dakota State Library General - Basement (PS3553.H4838 N54 2016M)
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Pictorial works (1) Bio-bibliography (1)	Print Locations Details Request Virtual Browse Book
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Topic Reacher, Jack (Fictitious	Child, Lee, author. 2017 • Available at North Dakota State Library New Book Shelf - Ground Floor (PS3553.H4838 M53 2017M)

New UI – stationary icon in lower right allows easy paging

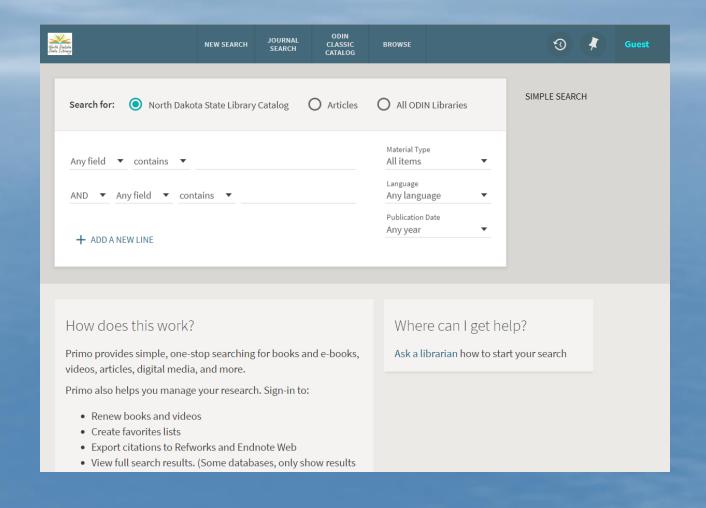
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Advanced Search



Advanced Search

This is an example of the Advanced Search screen. It allows you to search by scope (tab) with same search limiters as the Classic Primo UI.



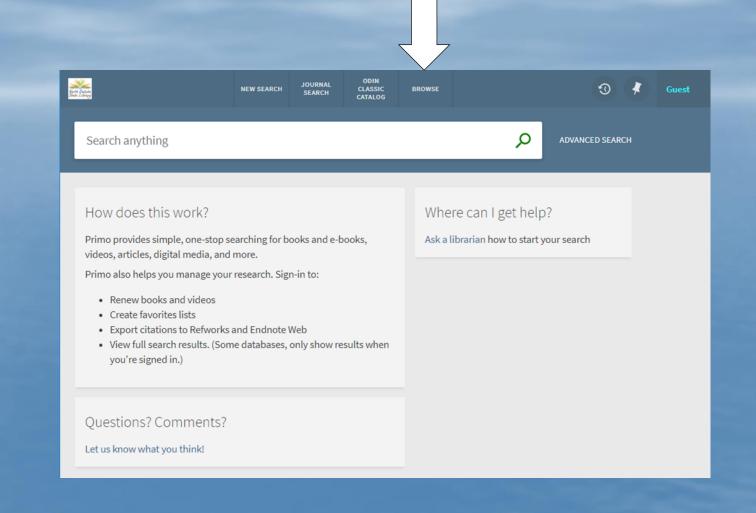
More advanced limiter lines ...

Patrons can click ADD A NEW LINE for up to 7 lines.

Signed & Cataline State & Extension	NEW SEARCH	JOURNAL SEARCH	ODIN CLASSIC CATALOG	BROWSE		3	Guest
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Any field ▼ contains ▼				Material Type All items	•		
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Browse searching

Browse link is located in the header area.



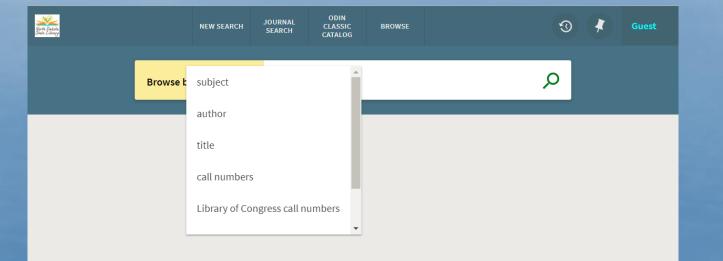
Main Browse screen ...

Contains the search box along with the browse dropdown options.



Browse

Browse options are customizable – the same as the Primo Classic UI.



Example of browse search

Results of an author search in the browse area.

Note the arrows for easy paging up and down.

Nere Catalog	NEW SEARCH JOURNAL SEARCH	ODIN CLASSIC BROWSE CATALOG	🕄 🧍 Guest	
Browse	<mark>oy author ▼</mark> Child	, Lee	Q	
Child, Lee			19 records	
Child, Lee. 22			1 record	
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Child, Lee. bk. 19			1 record	
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Child, Lee. book 19			1 record	
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ild, Lincoln, 1957- See: Child,	Lincoln			
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Browse results

Display after clicking on the author's name.

Again, notice the paging option in the lower right.

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SESSION OVERVIEW

This session will introduce you to the look and feel of Primo's New UI. We will touch on:

- Core Principles
- What has remained the same
- What has changed
- Enhancement timeline for 2018



- Possible implementation opportunities.

Primo in 2018

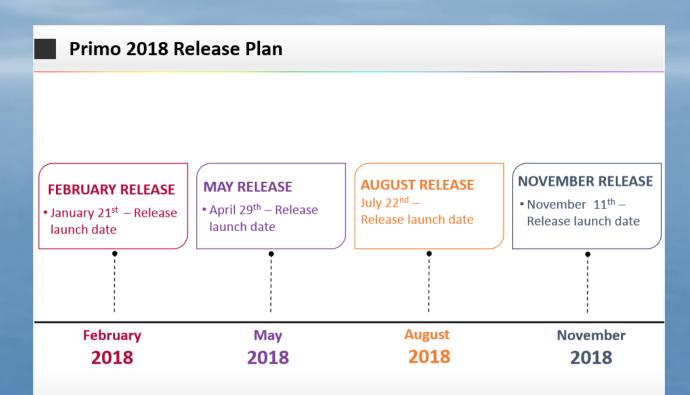
Many functionality changes in the past 18 months have been targeting the New UI. Primo 2018 Roadmap lists "Allow users to work efficiently with Zotero in new Primo User Interface" expected in first half of 2018. However, all highlights listed would impact the New UI.

	Roadmap Areas and Highlights 2018						
	iscovery cornerstones and functions						
	Search and rankingExploration and learning	Continuous enhancements New functionality					
	User Experience						
	User InterfaceDiscovery in Context	Additional functionality in Primo new user interface Discovery services in the right context of the users					
	Administration and maintenar	nce					
	Library empowerment	Allows library more control of record display					
	Open System						
	Enhanced APIsLinked Data	Expand capabilities leveraging the Primo API Raise the visibility of libraries on the Web					
	Primo Central content						
	New CollectionsEnhanced discoverability	Adding additional collections to Central Index Advanced discoverability and scanability of result lists					
201	18 Ex Libris Confidential & Proprietary	3 ExLibris					

Primo 2018 Release Dates

SANDBOX typically has the release installed 3 weeks after release launch date.

PRODUCTION is installed 4 weeks later.



* The release date refers to the date of the upgrade to the SaaS multitenant sandbox instances

** Primo VE releases are monthly, roadmap items will be distributed across the releases

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NEW UI IMPLEMENTATION

Question: Will the New UI be mandatory?

Answer: No. Ex Libris states the New UI will be available in addition to the old Primo design and customers will be able to decide when to start using it.

Question: Does new ILS plans affect switching to New UI? Answer: We are still early in the process so implementation of a new system is at least several months if not a year away.

HOW DO I REQUEST THE NEW UI FOR MY LIBRARY?

Contact me to start the planning process via ODIN Help Ticket or email (Lynn.Wolf@NDUS.edu)

A view can be configured on SANDBOX for you to review. We will work with you to make any requested adjustments until you approve the view and request it be put on PRODUCTION.

QUESTIONS?



