

Primo 101 for Front Line Staff

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Ray Henry, Orbis Cascade Alliance

There are 2 Primos:

- The patron-facing discovery tool, aka the Front End (FE)
- The administrative interface, Primo Back Office (PBO)

**We're mostly talking about
the FE, what things are
called, and what's
controlled in the PBO**

**One question to answer
first:**

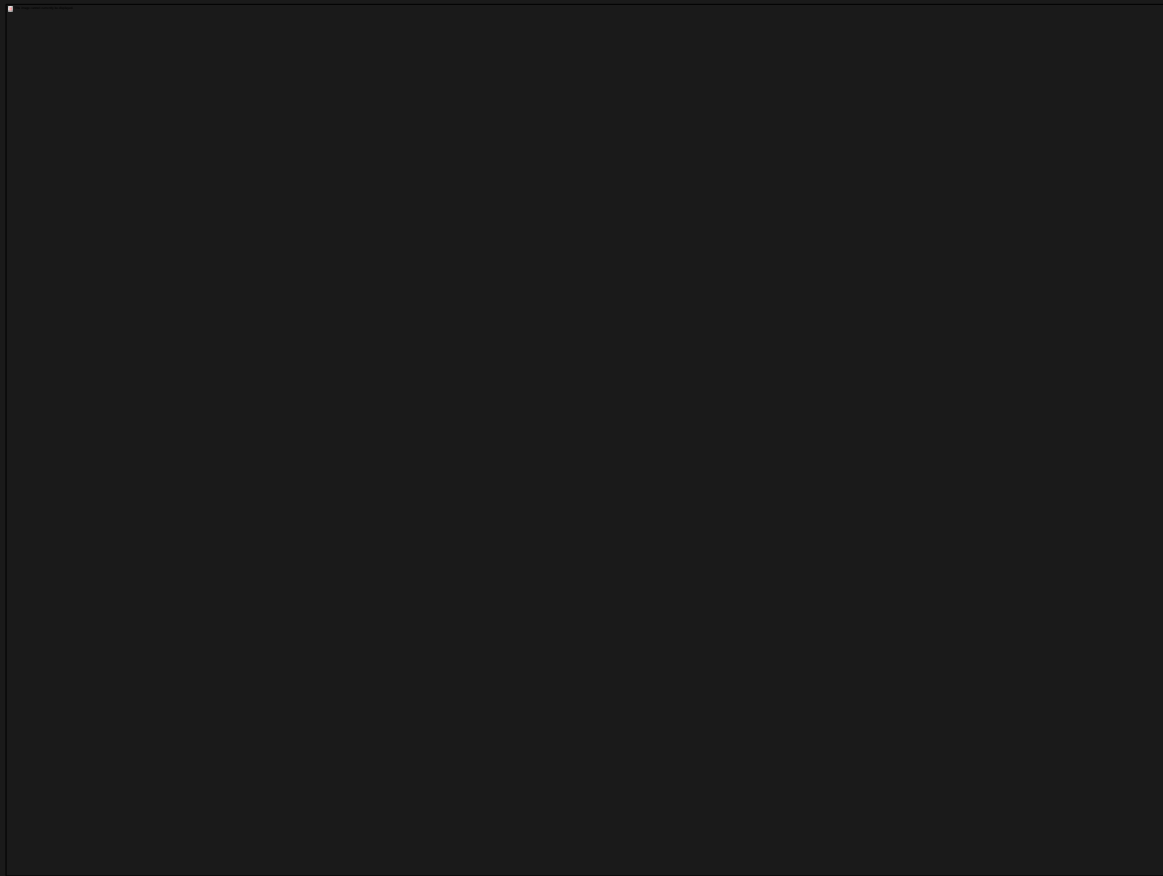
**Who's your
Primo Back Office
Administrator
(PBO Admin)?**

Primo Front End (FE) Elements

- Before the search
- After the search
- User accounts

Before the Search


Preparing for greatness



Before the Search


- Main Menu
- Scopes and Blended Search - covered in detail
- Advanced Search/ Prefiltering

Main Menu




Search@CULibraries
Concordia University · Portland, OR

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Linfield College
LIBRARIES

[New Search](#) | [WorldCat](#) | [Databases](#) | [Class Guides](#) | [Ejournals A-Z](#) | [Ask Us! \(chat\)](#) | [Help](#)



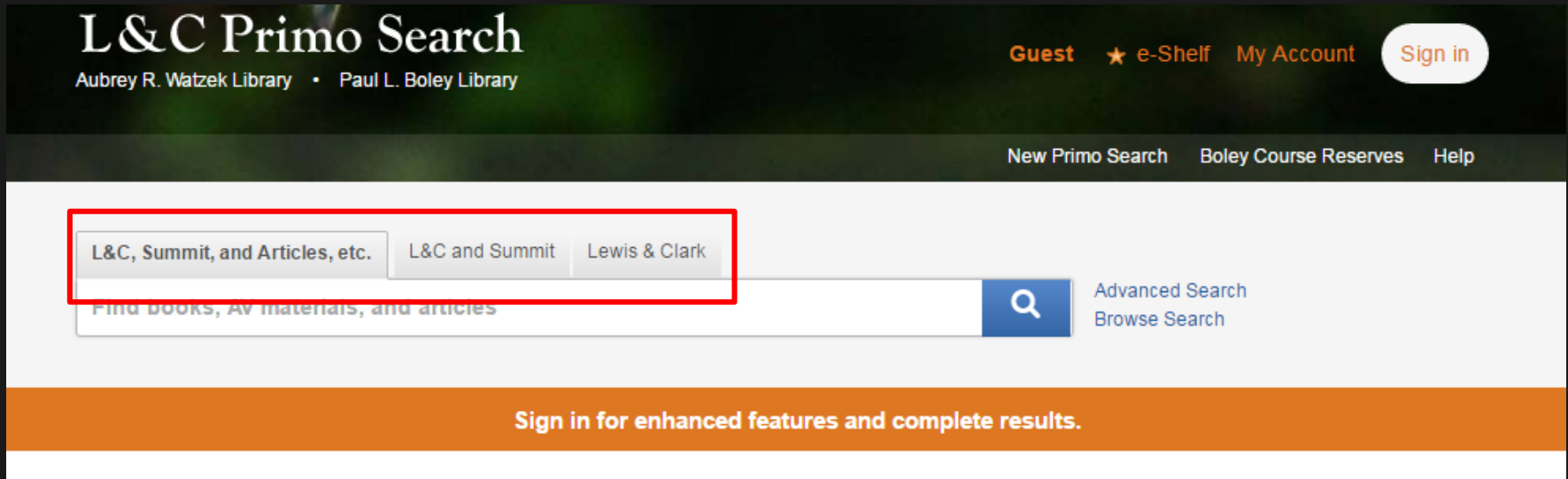
SEATTLEU

[NEW SEARCH](#) | [USER-GENERATED TAGS](#) | [EJOURNAL SEARCH](#) | [PRIMO GUIDE](#) | [CHAT WITH A LIBRARIAN](#)

UW Libraries Search

[Basic Search](#) | [Advanced Search](#) | [Browse Search](#) | [E-Journals](#) | [WorldCat](#) | [Search Help](#) | [Ask Us!](#)

Scopes and Blended Search



L&C Primo Search
Aubrey R. Watzek Library • Paul L. Boley Library

Guest ★ e-Shelf My Account **Sign in**

New Primo Search Boley Course Reserves Help

L&C, Summit, and Articles, etc. L&C and Summit Lewis & Clark


Find books, AV materials, and articles

Advanced Search
Browse Search

Sign in for enhanced features and complete results.

Detailed description: This screenshot shows the top navigation bar of the L&C Primo Search website. The header includes the site name, library affiliations, and user options like 'Sign in'. Below the header is a search bar with three tabs: 'L&C, Summit, and Articles, etc.', 'L&C and Summit', and 'Lewis & Clark'. The first tab is highlighted with a red box. To the right of the search bar are links for 'Advanced Search' and 'Browse Search'. An orange banner at the bottom of the search area encourages signing in for enhanced features.



 **WHITMAN COLLEGE**
Penrose Library

Library Resources Course Reserves Special Collections

sharks Whitman Library Search

Advanced Search
Browse Search

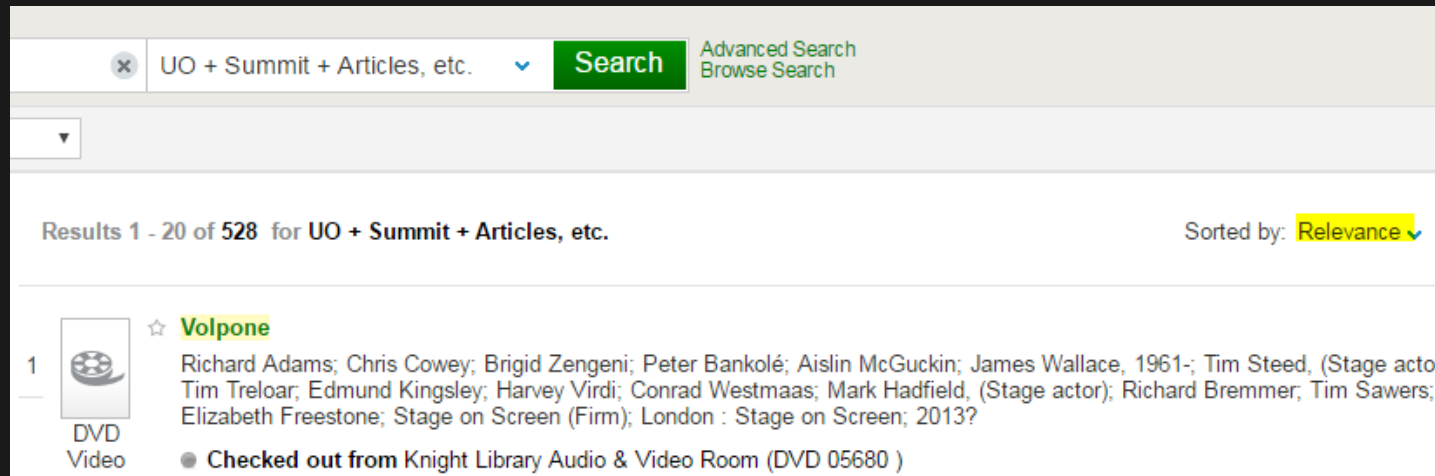
Detailed description: This screenshot shows the top navigation bar of the Whitman College Penrose Library website. It features the college's logo and name. Below the header are links for 'Library Resources', 'Course Reserves', and 'Special Collections'. A search bar contains the text 'sharks' and a dropdown menu is open, showing 'Whitman Library' as the selected option, which is highlighted with a red box. To the right of the search bar are links for 'Advanced Search' and 'Browse Search'.

Scopes - Common Issues

- Can't find a known item
 - Can't find a WorldCat title
- Can't find an article

Scopes - Troubleshooting

- Check the scope is correct
- Simplify the search terms
- Check the default “Sorted by” order




The screenshot shows a library search interface. At the top, there is a search bar containing the text "UO + Summit + Articles, etc." and a green "Search" button. To the right of the search bar are links for "Advanced Search" and "Browse Search". Below the search bar, the results are displayed as "Results 1 - 20 of 528 for UO + Summit + Articles, etc." and are sorted by "Relevance". The first result is a DVD video titled "Volpone" (marked with a star icon). The description for "Volpone" lists the cast: Richard Adams; Chris Cowey; Brigid Zengeni; Peter Bankolé; Aislin McGuckin; James Wallace, 1961-; Tim Steed, (Stage actor); Tim Treloar; Edmund Kingsley; Harvey Virdi; Conrad Westmaas; Mark Hadfield, (Stage actor); Richard Bremmer; Tim Sawers; Elizabeth Freestone; Stage on Screen (Firm); London : Stage on Screen; 2013?. Below the description, it indicates the item is "Checked out from Knight Library Audio & Video Room (DVD 05680)".

- Check the facets

Scopes - Fixes and Reporting

- Scopes are controlled in the PBO (and with norm rules)
- Contact your local PBO Admin for help


Using Advanced Search/Pre-search Filters

 Central Washington University Libraries

[New Search](#) | [Databases](#) | [Periodical A-Z](#) | [New Books](#) | [Research](#)

One Search | [Course Reserves](#) | [ScholarWorks](#)

| | | | | | |
|-----|----------|--|-----|-------------------|------------------------|
| Any | contains | | AND | Publication Date: | Any year |
| Any | contains | | AND | Material Type: | All items |
| Any | contains | | AND | Language: | Any language |
| Any | contains | | AND | Start Date: | Day Month Year |
| Any | contains | | AND | End Date: | Day Month Year |
| Any | | | | Search Scope: | CWU + Summit Libraries |

 Search@CULibraries
Concordia University · Portland, OR

[Books, Articles, & More](#) | [CU Collections](#) | [Summit](#) | [Course Reserves](#)

stuff

| | | |
|-----------|----------|------------------------|
| All items | contains | anywhere in the record |
|-----------|----------|------------------------|

After the Search

Working with your results



After the Search

- Facets
- “Get It” and “View It” tabs
- Alma iframe - covered in detail
- “More” link and “More” link lightbox
- Details tab - covered in detail
- Actions menu

Facets

Show only

Available in the Library (456)
Full Text Online (360)

Refine My Results

Subject

- United States (671)
- USA (192)
- Jazz (164)
- 1900 - 1999 (148)
- Science (102)

More options ▾

Resource Type

- Print Books (3,771)
- eBooks (408)
- Audio CDs (257)
- DVD Videos (108)
- LPs (79)

More options ▾

Author/Creator

- Forte, I (51)
- Smith, S (30)
- Davis, M (18)
- Wolfe, T (18)
- Bernstein, L (16)

More options ▾

Refine My Results

Resource Type

- Newspaper Articles (89,106)
- Articles (61,794)
- Reviews (4,673)
- Print Books (3,770)
- EBooks (842)


More options ▾

Library

- GFU Newberg (211)
- GFU Portland (41)

Date

To **Refine**

2004  2016

Subject

- United States (7,007)
- Canada (4,504)
- Western Europe (2,008)
- United Kingdom (1,897)
- Books (952)

More options ▾

Filter My Results Apply Filter(s)

Availability

- At WWU (584)
- WWU Online Resources (424)

show/hide filters

Format

- Print Books (493)
- eBooks (364)
- Streaming Media (55)

show/hide filters

Subject

- United States (130)
- USA (55)
- Jazz (53)

show/hide filters

Medical Subject

- United States (8)
- Philosophy (4)
- Psychology (3)


show/hide filters

Genre/Form

- History (63)
- Criticism, interpretation, etc (49)
- Biography (44)

show/hide filters

“Get It” and “View It” Tabs



☆ **Sharks : the perfect predators**
Alessandro De Maddalena, 1970- Vittorio Gabriotti; Walter (Walter D.) Heim 2008
● **Available at Chemeketa Salem Campus Library General Collection (597.34 D39 2008)**

Print Book

Get It Details Virtual Browse

Chemeketa Community College More(1) Sign-in for more options Actions


Request Options:

| | | | | |
|----------|----------------------|--------------------|-----------------|--------------|
| Location | Salem Campus Library | General Collection | 597.34 D39 2008 | Hide Details |
|----------|----------------------|--------------------|-----------------|--------------|

Availability: (1 copy, 1 available, 0 requests)

Barcode
336100369

eBook



☆ **Sharks of the open ocean biology, fisheries and conservation**
Merry Camhi; Ellen K. Pikitch; Elizabeth A. Babcock; Wiley InterScience (Online service) 2008
● **Online access**

View It Details

Open source in a new window Sign-in for more options Actions

Full text available at: [Wiley Online Ebooks \(Orbis Cascade Alliance Pilot\)](#)

Public notes:
Orbis Cascade Wiley Pilot

Additional services
[Contact a reference librarian](#)
Problems viewing this item? Please ask a reference librarian for help.

“Get It” and “View It” Tabs II

3

Global warming

David M. Haugen, 1969-; Susan Musser; Kacy Lovelace
©2010 Detroit : Greenhaven Press

☆ e-Shelf

Available at UW Bothell/CCC Library - Topics - 1st floor (Call Number: QC981.8.G56 G578 2010)

Availability & Request Options x

Item Details

UW Libraries users log in for all request options

Request Options:

Location: UW Bothell/CC Library - Topics - 1st floor - QC981.8.G56 G578 2010 [\(find this location\)](#)

Availability:

Type

Book



eBook

Global warming

Brian Black, 1966-; Gary J. Weisel; ©2010

Online access

Access Options

Details

WSU Libraries users sign in to see request options

Ebook Library (Orbis Cascade Alliance Ebooks)

Public notes:

Orbis Cascade DDA Purchased Resource

Full text or print issue unavailable?

Report an access issue

Print Book

Alma iframe



Print
Book

☆ **Sharks : the perfect predators**
Alessandro De Maddalena, 1970- Vittorio Gabriotti; Walter (Walter D.) Heim 2008
● **Available at Chemeketa Salem Campus Library General Collection (597.34 D39 2008)**

Get It Details Virtual Browse

Chemeketa Community College More(1)

Sign-in for more options

Actions▼



Request Options:

Location Salem Campus Library General Collection 597.34 D39 2008 [Hide Details](#)

Availability: (1 copy, 1 available, 0 requests)

Barcode

336100369



eBook

☆ **Sharks of the open ocean biology, fisheries and conservation**
Merry Camhi; Ellen K. Pikitch; Elizabeth A. Babcock; Wiley InterScience (Online service) 2008
● **Online access**

View It Details

Open source in a new window

Sign-in for more options

Actions▼



Full text available at: [Wiley Online Ebooks \(Orbis Cascade Alliance Pilot\)](#)

Public notes:

Orbis Cascade Wiley Pilot

Additional services

[Contact a reference librarian](#)

Problems viewing this item? Please ask a reference librarian for help.

Alma iframe - Common Issues

- Might not see library's physical inventory
- Missing Summit request link
- No links to access to electronic resources
- Error message: "There was an error loading the tab"


Alma iframe - Troubleshooting

- Try the search one more time
- Check Alma vs. Primo
- Start fresh: log out, clear your cache/cookies, close browser (all open windows tabs)
- Email the record to yourself

Alma iframe - Fixes and Reporting

- Contact your Alma Resource Management Admin for help
- Contact your local PBO Admin for help

“More” Link




Stuff
Daniel Miller, 1954- 2010
● **Check holdings**

Print Book

[Find/Request](#) [Item Details](#)

[Sign in for request options](#) Mt Hood Community College [More\(9\)](#)




☆ **Where the wild things are**
Maurice Sendak Maurice Sendak, signer. 1988
● **Checked out**

Print Book

[Get It](#) [Details](#) [Virtual Browse](#)

Marylhurst University [More\(3\)](#)



☆ **The right stuff**
Tom Charity British Film Institute. 1997
● **Check Availability**

Print Book

[Availability & Request Options](#) [Item Details](#)

[Sign in for More Options](#) Oregon Health & Science University [Summit Libraries \(8\)](#)

“More” Link Lightbox

Freedom in a rocking boat: changing values in an unstable society.

Print Bo

Institutions X

My Institution:

| | |
|---------------------------|-----------------------------------|
| Portland State University | <input type="radio"/> Checked out |
|---------------------------|-----------------------------------|

Other Institutions:


| | |
|-------------------------------|--|
| Central Washington University | <input checked="" type="radio"/> Available |
| University of Washington | <input checked="" type="radio"/> Available |
| Washington State University | <input checked="" type="radio"/> Available |
| Western Washington University | <input checked="" type="radio"/> Available |

Print Bo

Library Journal, July, 1972, p.2422

Full text available

Details Tab



Print Book

☆ [ASPCA complete guide to cats](#)
James R. Richards, 1948-2007. American Society for the Prevention of Cruelty to Animals.
1999
● Available at Rock Creek Main Collection (636.8 R53a 1999)

[Permalink](#) [Citation](#)

[Availability & Request Options](#) [Item Details](#) [Browse Shelf](#)

[Actions](#)  

Title: ASPCA complete guide to [cats](#)

Uniform Title: Complete guide to cats

Author: [James R. Richards, 1948-2007.](#)
[American Society for the Prevention of Cruelty to Animals.](#)

Attribution: James R. Richards.

Subjects: [Cats](#)
[Cats -- Health](#)
[Cats -- Diseases](#)

Description: Section I How to Bring a Cat into Your Life 13 -- Section II Reference Guide to Cat Breeds 65 -- Section III What Makes a Cat a Cat? 171 -- Section IV Taking Care of Your Cat 231.

An illustrated guide to [cats](#) that provides detailed profiles of fifty breeds and information on choosing the right cat, preparing to bring a new cat home, keeping a cat healthy, litter box training, feeding and grooming, and other related topics.

Includes bibliographical references (page 354) and index.

Publisher: San Francisco : Chronicle Books

Creation Date: 1999

Format: 367 pages : color illustrations ; 22 cm

Language: English

Identifier: ISBN: 0811819299 ;ISBN: 9780811819299

OCLC Number: 40632356

Details Tab - Common Issues

- Different metadata for different origins: PCI, vendor, local repository, Alliance Alma
- Only centrally published Alma under NRWG control
- *Not an issue but an FYI:* Good info for troubleshooting

Details Tab - Troubleshooting

- Getting an MMS ID
- Have to be here to view the PNX record
- Visible metadata varies by institution, but all institutions search the same metadata

Details Tab - Fixes and Reporting

- Contact your local PBO Admin for help
- Request changes/review from the NRWG

Actions Menu

The image shows a library search results page for the book "Freedom in a rocking boat: changing values in an unstable society." by Geoffrey Vickers, Sir, 1894-1982. The page is titled "Results 1 - 10 of 31 for OHSU + NW Academic Libraries (Summit)" and is sorted by Relevance. A yellow banner at the top of the results area reads: "Current PSU students, faculty, staff, and affiliates [sign in](#) for additional results and request options." Below this, there is a button "Save Link/URL for this Search". The search results show two entries for the book, both with a "Check Find & Request for options" button. An "Actions" menu is overlaid on the left side of the page, listing various actions such as "Add to e-Shelf", "E-mail", "Print", "Permalink", "Citation", "EasyBib", "EndNote", "RefWorks", "Delicious", "Export RIS", and "Report a Problem". The menu is currently open, showing a list of actions for the selected item, including "Add to Folder", "Email", "Print", "Link/URL", "Citation", "EndNote", "RefWorks", "Mendeley/Zotero", "Send via Text", and "Report an Error".

Results 1 - 10 of 31 for OHSU + NW Academic Libraries (Summit) Sorted by: Relevance 1 2 3 4 ▶

L&C, Summit, and Articles, etc. L&C and Summit Lewis & Clark

freedom in a rocking boat

Permalink for this item: <http://primo.clark.edu/LCC:CP71104084840001451>

Print Book

☆ Freedom in a rocking boat: changing values in an unstable society.
Geoffrey Vickers, Sir, 1894-1982. 1970
● Check Availability

Availability & Request Options Item Details

Sign in for More Options Oregon Health & Science University Summit Libraries (5)

Save/Export Options

Actions

- Add to e-Shelf ☆
- E-mail ✉
- Print 🖨
- Permalink 🔗
- Citation “”
- EasyBib ☆
- EndNote ☆
- RefWorks ☆
- Delicious 📌
- Export RIS ☆
- Report a Problem 🚩

Freedom in a rocking boat: changing values in an unstable society.
Geoffrey Vickers, Sir, 1894-1982.
London, Allen Lane 1970

⚠ Current PSU students, faculty, staff, and affiliates [sign in](#) for additional results and request options.

Save Link/URL for this Search

Results 1 - 50 of 233 for Books, Articles & More Sorted by: Relevance 1 2 3 4 5 ▶

☆ eShelf Link/URL Export/Email

Print Book

☆ Freedom in a rocking boat: changing values in an unstable society.
Geoffrey Vickers, Sir, 1894-1982.
London, Allen Lane 1970
● Check Find & Request for options

Find & Request Details Virtual Browse

☆ eShelf Link/URL

☆ Freedom in a rocking boat: changing values in an unstable society.
Geoffrey Vickers, Sir, 1894-1982.
New York Basic Books 1971, ©1970
● Check Find & Request for options

Print Book

- Add to Folder
- Email
- Print
- Link/URL
- Citation
- EndNote
- RefWorks
- Mendeley/Zotero
- Send via Text
- Report an Error

BONUS CONTENT



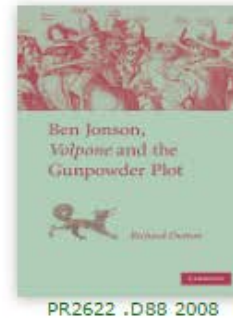
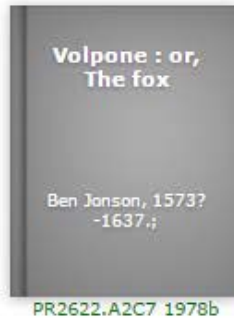
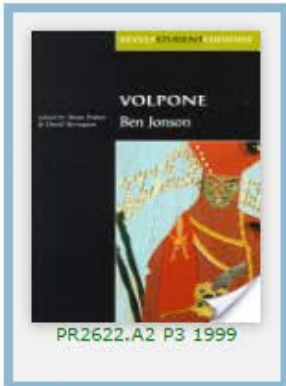
**Optionally displayed:
Virtual Browse
bX Recommender**

Virtual Browse

Find in a library

Details

Related Items



« Previous

bX Recommender

Results 1 - 30 of 2,306 for **Reed + Summit + Articles** Sorted by: Relevance 1 2 3 4 5 →

Show only [Reed Online Resources](#) (1,690) | [Available at Reed](#) (3) | [Peer-reviewed Journals](#) (1,833)



Article

☆ **Seabird predation on Arctic cod during summer in the Canadian Arctic** [View all versions](#)

Matley, Jk ; Fisk, At ; Dick, TA
Marine Ecology Progress Series, 03/29/2012, Vol.450, pp.219-228 [Peer Reviewed Journal]
Not available online, click Get It tab to check for other copies

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2. Galeotti, P [Colour polymorphism in birds: causes and functions](#) Journal of evolutionary biology 16.4 (2003) 635-646 [🔍](#) [👍](#) [👎](#)
3. Sandvik, Hanno [Climate affects seabird population dynamics both via reproduction and adult survival](#) Marine ecology progress series 454 (2012) 273-+ [🔍](#) [👍](#) [👎](#)
4. Gaston, Anthony J [Populations and trends of Canadian Arctic seabirds](#) Polar biology 35.8 (2012) 1221-1232 [🔍](#) [👍](#) [👎](#)

[View More...](#)

User Accounts


Offering security, access, and control



User Accounts

- PDS and no-PDS authentication
- My Account
- eShelf (Favorites)
- Alerts (Saved Searches)

PDS (and no-PDS) authentication



Username:

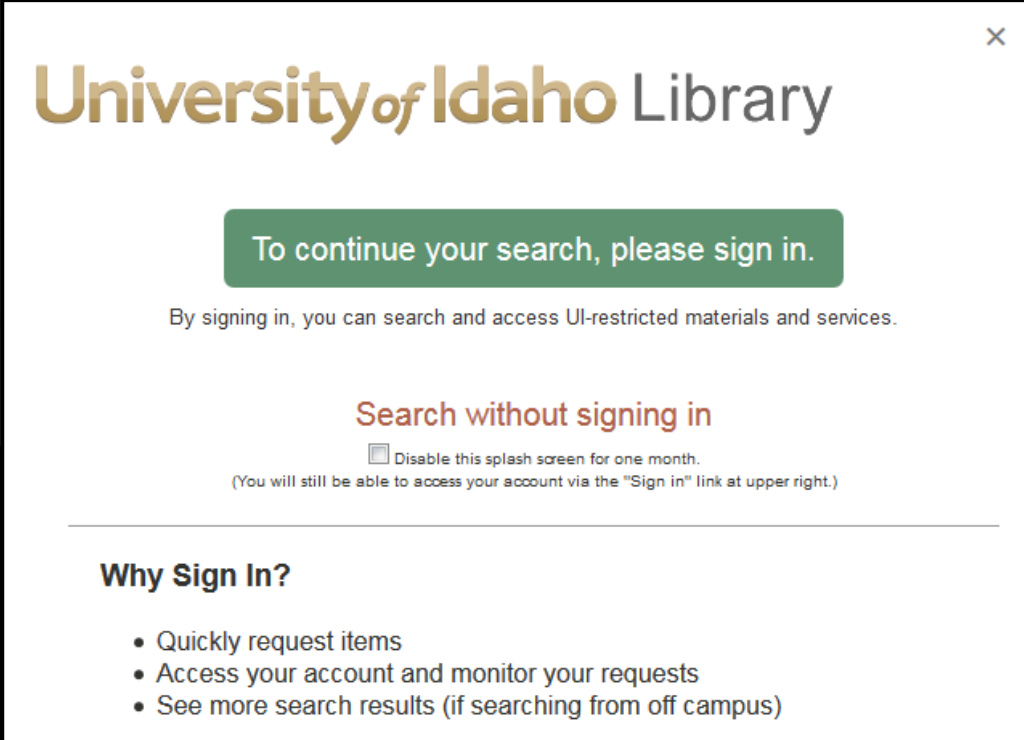
Password:

Alumni and community members use b

Why sign in?

- View all resources available to you
- Request items

[No account? -- click for guest access](#)



University of Idaho Library

To continue your search, please sign in.

By signing in, you can search and access UI-restricted materials and services.

[Search without signing in](#)

Disable this splash screen for one month.
(You will still be able to access your account via the "Sign in" link at upper right.)

Why Sign In?

- Quickly request items
- Access your account and monitor your requests
- See more search results (if searching from off campus)

My Account

e-Shelf Searches **My Account**

- Loans (1)
- Requests 0
- Fines & Fees (!)
- Blocks & Messages
- Personal Settings

List of Active Loans

[Renew All](#) [Renew Selected](#)

| # | Title | Author | Due Date | Due Hou |
|---|--|----------------|----------|---------|
| 1 | <input type="checkbox"/> The productivity project : accomplishing more by managing your time, attention, and energy better / | Bailey, Chris, | 11/15/16 | 23:5 |

e-Shelf Searches **My Account**

- Loans (1)
- Requests 0
- Fines & Fees (!)**
- Blocks & Messages
- Personal Settings

List of Fines: **Fines Balance: 3.00** [Pay Fines](#)

| # | Title | Author | Fine Date | Type | |
|---|----------|--------|-----------|-------|----------|
| 1 | no title | | 03/10/16 | Debit | 3.00 USD |

Fines Balance: 3.00

eShelf (Favorites)

e-Shelf Searches My Account

☰ aje 📁 📁 📁 📁

📁 **Main Folder (6)**

- 📁 Farey project (30) 🗨
- 📁 Math (5) 🗨
- 📁 CSS and web (6) 🗨
- 📁 Germany (9) 🗨

Main Folder ✂ 📄 📄 ✖ E-mail Print Push to RISPushTo ▾ Go

| <input type="checkbox"/> | Type | Author | Title | Added | 🗨 |
|--------------------------|------------|------------------------|----------------------------|----------|---|
| <input type="checkbox"/> | eBook | Spencer, Lawrence | Reliable JavaScript: Ho... | 12/17/15 | 🗨 |
| <input type="checkbox"/> | eBook | Cameron, Dane | HTML5, JavaScript, and... | 12/17/15 | 🗨 |
| <input type="checkbox"/> | eBook | Mcpeak, Jeremy | Beginning JavaScript | 12/17/15 | 🗨 |
| <input type="checkbox"/> | Print Book | Jon Duckett | HTML & CSS : design a... | 12/29/15 | 🗨 |
| <input type="checkbox"/> | Print Book | J. K. Rowling, author. | Harry Potter and the so... | 03/09/16 | 🗨 |
| <input type="checkbox"/> | Print Book | J. K. Rowling | Harry Potter and the so... | 03/09/16 | 🗨 |


Alerts (saved searches)

e-Shelf **Searches** My Account

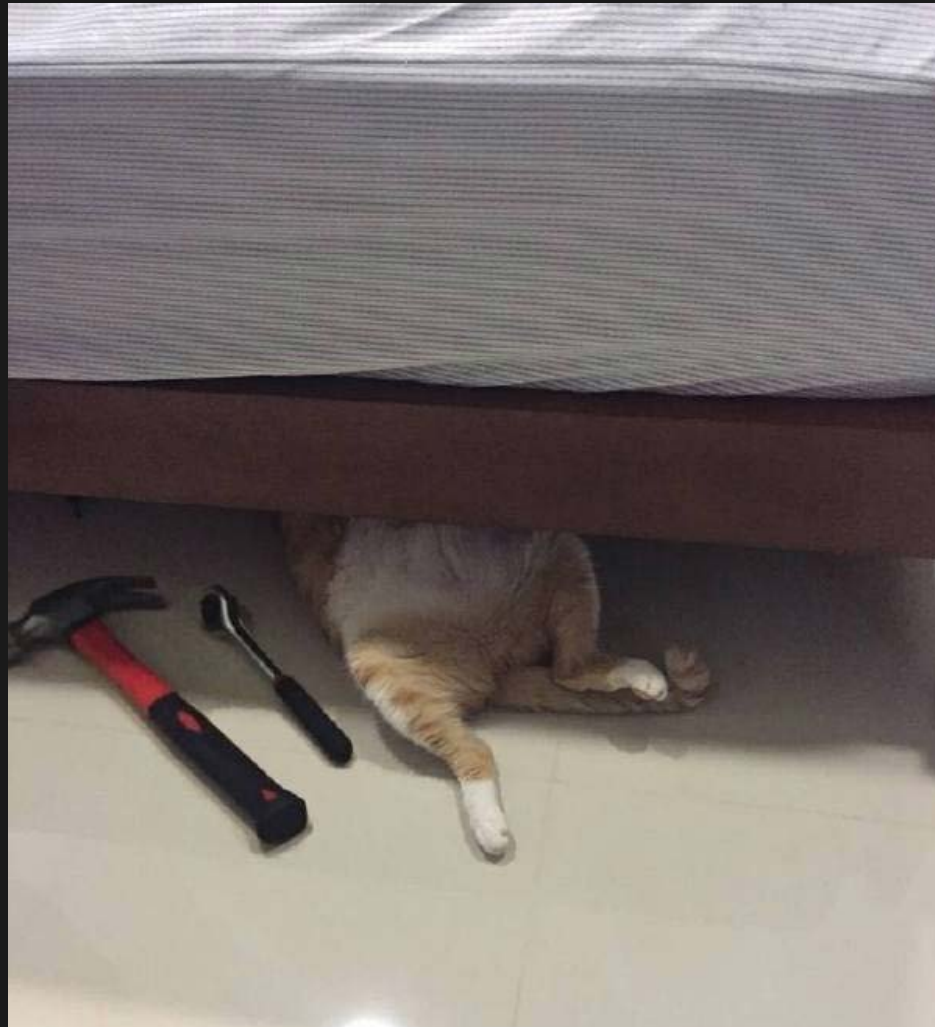
This session's searches

▶ Saved searches & alerts (1)

Saved searches & alerts

| # | Search name | Alert type | Update/Set alert | RSS | Delete |
|---|--|------------|------------------------|---|------------------------|
| 1 | Modular forms - everything | Email | Update |  Subscribe | Delete |

TOOLS



Troubleshooting Tools

- [showPNX bookmarklet](#): This bookmarklet lets you pull up an item's Primo Normalized XML record. That record contains the data used by Primo to control record display. It also shows what data is in the search indexes, used by facets, etc.
- [Show recordID bookmarklet](#): This bookmarklet lets you display the record IDs for all of the results of your search. This allows you to look at the record in Alma, and/or provide the record ID when reporting a problem to local administrators.

Troubleshooting Tools

See the record in [other Alliance sites](#): This allows you to determine if the problem you're experiencing is only happening at your institution, or if it's Alliance-wide.

- **Get a screenshot or video using a capture tool like [Jing](#)**: That way, even if you don't know the right words to describe a problem, you can show your local administrator what's going on.

Troubleshooting Tips

- Who should I report this to?
- What info do I need?
 - Example record / example search
 - Applies to 1 record? All of a type?
 - When did the issue happen?
 - Search scope used, if applicable?

Alliance Primo Examples

More customized

[Lewis and Clark](#)

[Western Washington](#)

[Whitman](#)

[University of Washington](#)

Less customized

[St. Martin's](#)

[University of Idaho](#)

[Washington State](#)

[Linfield](#)

The In-Depth Version

<http://bit.ly/29QYSu2>

Thanks!

Questions?

We're here
to help!

