Primo 101 for Front Line Staff

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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
Scopes and Blended 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
- 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
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

Refine My Results

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

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

Date

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

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

Filter My Results

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

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

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

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

Genre/Form
- History (63)
- Criticism, interpretation, etc (49)
- Biography (44)
“Get It” and “View It” Tabs

Sharks: the perfect predators
Alessandro De Maddalena, 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

Request Options:
Location Salem Campus Library General Collection 597.34 D39 2008 Hide Details

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

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

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

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
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
“More” Link Lightbox

**Institutions**

- **My Institution:**
  - Portland State University - Checked out

- **Other Institutions:**
  - Central Washington University - Available
  - University of Washington - Available
  - Washington State University - Available
  - Western Washington University - Available
ASPICA complete guide to cats


Available at Rock Creek Main Collection (636.6 R53a 1999)

- Title: ASPICA complete guide to cats
- Uniform Title: Complete guide to cats
- 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
- 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
Optionally displayed: Virtual Browse
bX Recommender
Virtual Browse
Seabird predation on Arctic cod during summer in the Canadian Arctic

Matley, J.K.; Fisk, A.T.; Dick, T.A.
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

Users interested in this article also expressed an interest in the following:

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
My Account

List of Active Loans

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Author</th>
<th>Due Date</th>
<th>Due Hour</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The productivity project: accomplishing more by managing your time, attention, and energy better /</td>
<td>Bailey, Chris,</td>
<td>11/15/16</td>
<td>23:50</td>
</tr>
</tbody>
</table>

List of Fines:

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<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Author</th>
<th>Fine Date</th>
<th>Type</th>
<th>Fines Balance: 3.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>no title</td>
<td></td>
<td>03/10/16</td>
<td>Debit</td>
<td>3.00 USD</td>
</tr>
</tbody>
</table>

Fines Balance: 3.00
eShelf (Favorites)
### Saved searches & alerts

<table>
<thead>
<tr>
<th>#</th>
<th>Search name</th>
<th>Alert type</th>
<th>Update/Set alert</th>
<th>RSS</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Modular forms - everything</td>
<td>Email</td>
<td>Update</td>
<td>Subscribe</td>
<td>Delete</td>
</tr>
</tbody>
</table>
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

Thanks!

Questions?

We're here to help!