

Primo Workaround: Search Using Date Ranges

Problem:

Primo's date facet and date slider do not work properly with resources that cover a range of dates. For these resources, a user's specified date range must include either the start date or the end date of the inclusive date range before they will be included in the result set. This places an undue burden on the user, who should not have to bring detailed knowledge of a specific resource to their Primo session in order to find it. Due to this lack of flexibility in the date facet, searching for these resources using dates in Primo amounts to conducting a known-item search, rather than being able to rely on the search engine to return all applicable results, known and unknown. For these resources, then, Primo is less of a "discovery" platform than a "confirmation" platform.

Example:

Pacific American Fisheries Records. Held by WWU.

- Inclusive dates: 1875-1994.
- Bulk dates: 1899-1967.

☆ Pacific American Fisheries Records, 1875-1994 1899-1967.
Pacific American Fisheries, Inc.; Bert W. Huntoon, 1869-1947.; George E. Hube; Galen Biery; 1875

Archival Materials

Available at Heritage Resources--Archives Building Center for Pacific Northwest Studies
Archives Bldg. 225

Request Options Details

The following dates were entered in the Primo date facet and used to filter a keyword search for "Pacific American Fisheries", with the noted results:

Start date	End date	In result set?
1800	1850	No - outside of inclusive dates (Control)
1800	1875	Yes
1800	1890	Yes
1800	1899	Yes
1850	1967	Yes
1875	1950	Yes
1899	1950	No
1899	1990	No
1899	2000	Yes

1900	1967	No
1950	1967	No
1950	1994	Yes
1967	1980	No
1967	2000	Yes
1990	2000	Yes
1994	2000	Yes
1995	2000	No - Outside of inclusive dates (Control)

From these test results, it's clear that Primo does not use the bulk dates for date range faceting at all. It is also clear that the date range specified by the user must cover either the start or end of the inclusive dates in order for Primo to return the resource in the faceted result set.

This causes a problem when users input date ranges **internal** to the inclusive dates - such as 1967 to 1980, or 1900 to 1967. These date ranges should result in the inclusion of the Pacific American Fisheries record being returned in the result set, since they are both covered by the inclusive (and bulk) dates of the resource. However, because they do not cover either the start or end year of the inclusive date, the resource is not returned in the faceted set.

Workaround:

Until Ex Libris addresses this functional deficit, users who frequently rely on date ranges to identify needed resources should use Primo's Advanced Search mode. Advanced search offers the ability to pre-filter searches by **Start Date** and **End Date**. These date pre-filters function much better than the post-search facets for resources that cover ranges of dates.

The screenshot shows the Primo Advanced Search interface. On the left, there are three search criteria: 'Any' contains 'pacific american fisheries', 'Any' contains an empty field, and 'Any' contains another empty field. These are connected by 'AND' operators. On the right, there are several filters: 'Publication Date' is set to 'Any year', 'Start Date' is set to 'Day', 'Month', and 'Year', 'End Date' is set to 'Day', 'Month', and 'Year', 'Format' is set to 'All items', and 'Language' is set to 'Any language'.

Using the prefilters in Advanced search mode with our example search yielded the following results:

Start date	End date	In result set?
1800	1850	No - outside of inclusive dates (Control)
1800	1875	Yes
1800	1890	Yes
1800	1899	Yes
1850	1967	Yes

1875	1950	Yes
1899	1950	Yes - change from facet behavior
1899	1990	Yes - change from facet behavior
1899	2000	Yes
1900	1967	Yes - change from facet behavior
1950	1967	Yes - change from facet behavior
1950	1994	Yes
1967	1980	Yes - change from facet behavior
1967	2000	Yes
1990	2000	Yes
1994	2000	Yes
1995	2000	No - Outside of inclusive dates (Control)

These results suggest that Primo's Advanced Search pre-filters for start and end dates are far superior to the Basic search facet start and end dates. Using the pre-filters, users can retrieve appropriate results for their search, even when they specify a date range that is **internal** to the inclusive dates of a resource.

Enabling Start/End Date Prefilters in the PBO (for Primo Administrators):

Go to the PBO Views Wizard, and click **Edit** to modify the desired view. Click **Continue** until you reach the **Tile Configuration** page. In the **Home Page** section, edit the **Advanced Search** tile. Under **Define search pre-filters**, select the **Date Range** option in the **Search Type** drop-down. Click **Create**. Once the Date Range line is present in the pre-filters list, click the checkboxes to enable the prefilter in each of your tabs. Use the arrow buttons on the right to move the date range prefilter to the desired position. Save and deploy your changes.

Define search pre-filters

Search Type **Search Status** atWWU wwusummit everything default everythingandmore

Complex Search Line 1	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete	▲▼
Complex Search Line 6	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete	▲▼
Complex Search Line 7	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete	▲▼
Publication Date 1	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete	▲▼
Date Range	Default	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Delete	▲▼
Material Type 1	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete	▲▼
Languages 1	User Defined	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit	Delete	▲▼

Create a new search option Search Type: Date Range Create