Primo May 2021 Release Notes

August Sneak Peek

• Direct links to PDF using Unpaywall – Add indication and direct link to PDF from the brief results if a match is found with Unpaywall.

• Roll out of the Improved Pagination Experience to all customers, making sure the new pagination is the default for Primo.

• UX Improvements on the List of versions page and the Save Query Notification Settings area.

Features

Improved Pagination Experience

May 2021
In the new Primo UI, users can now specify whether to display 10, 25, or 50 results per page on the following pages:

• Simple and Advanced search results

• Journal Search

• Database Search

• Browse Search (records page only, not the main Browse page)

• Citation trail

• Related items (book chapter, book review, and so forth)

• Newspaper Search

In most cases, the new pagination method will be used for the above pages and users will have the option to display the next/previous set of results by selecting the right/left arrow or display a specific set of results by selecting a page number.

In the following example, the user has selected a maximum of 10 results per page and is currently viewing the second set of 10 results:
Number of Results and Page Selection

Note

- The **Results Per Page** setting is applied to all types of pages listed above and is retained for the entire session for all users. In addition, this setting applies to the number of items displayed in Collection Discovery.
- For simple and advanced search results, blocks of search results are displayed as follows for each remote search type:
  - MetaLib – Users will continue using the old method of selecting **Load More Results**, which appends more results to the same page. Because MetaLib returns 30 results in each bulk, the number of results displayed in Primo is based on the number of results the user has selected for the new paging method and the number of results left to display from each bulk returned from MetaLib:
    - **10** – Each bulk will contain a maximum of 10 results.
    - **25** – If there are 60 results, the first and third bulks will contain 25 results and the second and fourth bulks will contain the remaining 5 results left in each bulk of 30 returned from MetaLib.
    - **50** – Each bulk will contain a maximum of 30 results.
  - CDI, Search WebHooks, EBSCO, and WorldCat – Results display with the new pagination method.
- The search results are refreshed and returned to the first page each time the **Results Per Page** field is changed.

### Configuration Options

For the May release, the new pagination method is disabled by default to allow customers time to adjust any customizations that they may have made to the existing Load More Results area and Paging widget. For August, the plan is to resolve the related known issues and replace the old method for loading pages (except for MetaLib searches) with the new pagination method.

The following table lists the configuration options associated with this feature.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution Properties mapping table (<a href="#">Primo Home &gt; Advanced Configuration &gt; All Mapping Tables</a>)</td>
<td>Set the <code>enable_results_per_page</code> parameter to <code>true</code> to activate the new pagination method for your institution. If this parameter does not exist, you will need to add a new mapping row for it.</td>
</tr>
<tr>
<td>View Properties mapping table (<a href="#">Primo Home &gt; Advanced Configuration &gt; All Mapping Tables</a>)</td>
<td>Set the <code>suspend_watchers_browser_support</code> parameter to <code>ALL</code> to optimize the performance of the new pagination method.</td>
</tr>
<tr>
<td>Results Tile code table (<a href="#">Primo Home &gt; Advanced Configuration &gt; All Code Tables</a>)</td>
<td>To customize or translate the label for the Results Per Page field, which appears at the bottom of the various search results pages, update the following code:</td>
</tr>
<tr>
<td>aria Labels code table (<a href="#">Primo Home &gt;</a>)</td>
<td>For screen readers, you can customize or translate the following associated codes:</td>
</tr>
</tbody>
</table>
### Advanced Configuration > All Code Tables

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>• default.nui.aria.paging.numberOfResults:</td>
<td>Display {{number}} results per page</td>
</tr>
<tr>
<td>• default.nui.aria.paging.currentNumberOfResults:</td>
<td>Current results per page: {{results}}</td>
</tr>
<tr>
<td>• default.nui.aria.currentPage:</td>
<td>Current Page: {{page}}</td>
</tr>
<tr>
<td>• default.nui.aria.paging.gotopage:</td>
<td>navigate to result page {{number}}</td>
</tr>
</tbody>
</table>

### Analytics

To support this functionality, the following actions have been added to the Action Usage subject area:

<table>
<thead>
<tr>
<th>Group</th>
<th>Subgroup</th>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Results List</td>
<td>General</td>
<td>Change number of results per page</td>
<td>User changed the Results Per Page field on a results page.</td>
</tr>
</tbody>
</table>

### Improve Search with Hyphens

**May 2021**

Local repository searches that include a search term with a hyphen will now return additional results by including the term's compound word in the search. For example, searches for the term `chat-room`, will also include results for `chat room` and `chatroom`. Previously, the system only added results for `chat room`. The supported terms are based on the same terms used for CDI results and are stored in the `eng_systemSynonyms` file. For more details, see [Hyphenated Search Terms](#). For Cloud customers, please open a Support ticket if further enrichment is necessary.

### Topic/Reference Entry: Update Display Source

**May 2021**

The database name that was displayed as the source of a reference in the Topic Overview was previously based on the client activation and could be unrelated to the source of the record. With this enhancement, the Source field is now determined as follows:

- Use `addata/jtitle` if it exists.
- If the previous source does not exist, use `addata/btitle` if it exists.
- If neither exist, the Source field will not be displayed.

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**Ex Libris, a ProQuest Company**
Ongoing Accessibility Improvements (May)

May 2021
We are continuously working to improve product accessibility to make it comply with the standard of WCAG 2.0 AA level. In this release, we have resolved the following issues:

- The page titles will now include the title of the Primo site and additional information specific to the page. For example:

  ![Image of Enhanced Title on Newspaper Search Page]

The following table lists the expected title and configuration information for each page:

<table>
<thead>
<tr>
<th>Page</th>
<th>Title Format and Code Table Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Favorites &gt; Saved Records</td>
<td>Title Format: default.main.title - default.nuifavorites.header - default.nuifavorites.records.tabheader</td>
</tr>
<tr>
<td></td>
<td>Header/Footer Tiles code table – default.main.title: <strong>Primo by Ex Libris</strong></td>
</tr>
<tr>
<td></td>
<td>Favorites Labels code table – default.nuifavorites.header: <strong>My Favorites</strong></td>
</tr>
<tr>
<td></td>
<td>default.nuifavorites.records.tabheader: <strong>Saved records</strong></td>
</tr>
<tr>
<td>My Favorites &gt; Search History</td>
<td>Title Format: default.main.title - default.nuifavorites.header - default.nuifavorites.records.tabheader</td>
</tr>
<tr>
<td></td>
<td>Header/Footer Tiles code table – default.main.title: <strong>Primo by Ex Libris</strong></td>
</tr>
<tr>
<td></td>
<td>Favorites Labels code table – default.nuifavorites.header: <strong>My Favorites</strong></td>
</tr>
<tr>
<td></td>
<td>default.nuifavorites.history.tabheader: <strong>Search history</strong></td>
</tr>
<tr>
<td>My Favorites &gt; Saved Searches</td>
<td>Title Format:</td>
</tr>
<tr>
<td>Page</td>
<td>Title Format and Code Table Information</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>default.main.title - default.nui.favorites.header - default.nui.favorites.records.tabheader</td>
</tr>
<tr>
<td></td>
<td><strong>Header/Footer Tiles code table</strong> – default.main.title: Primo by Ex Libris</td>
</tr>
<tr>
<td></td>
<td><strong>Favorites Labels code table</strong> – ◦ default.nui.favorites.header: My Favorites ◦ default.nui.favorites.search.tabheader: Saved searches</td>
</tr>
<tr>
<td>Journal Search</td>
<td><strong>Title Format (before search):</strong> default.nui.mainmenu.label.journalsearch</td>
</tr>
<tr>
<td></td>
<td><strong>Title Format (after search):</strong> default.nui.mainmenu.label.journalsearch - &lt;search term&gt;</td>
</tr>
<tr>
<td></td>
<td><strong>View Labels code table</strong> – default.nui.mainmenu.label.journalsearch: Journal Search</td>
</tr>
<tr>
<td>Browse Search</td>
<td><strong>Title Format (before search):</strong> default.nui.mainmenu.label.browse</td>
</tr>
<tr>
<td></td>
<td><strong>Title Format (after search):</strong> default.nui.mainmenu.label.browse - &lt;search term&gt;</td>
</tr>
<tr>
<td></td>
<td><strong>View Labels code table</strong> – default.nui.mainmenu.label.browse: Browse</td>
</tr>
<tr>
<td>Tags</td>
<td><strong>Title Format (before search):</strong> default.nui.mainmenu.label.tags</td>
</tr>
<tr>
<td></td>
<td><strong>Title Format (after search):</strong> default.nui.mainmenu.label.tags - &lt;search term&gt;</td>
</tr>
<tr>
<td></td>
<td><strong>Tags Tile code table</strong> – default.nui.mainmenu.label.tags: TAGS</td>
</tr>
<tr>
<td>Fetch Items (Citation Linker)</td>
<td><strong>Title Format:</strong> default.nui.mainmenu.label.citationlinker</td>
</tr>
<tr>
<td></td>
<td><strong>View Labels code table</strong> – default.nui.mainmenu.label.citationlinker: Fetch Item</td>
</tr>
<tr>
<td>Page</td>
<td>Title Format and Code Table Information</td>
</tr>
<tr>
<td>----------------------</td>
<td>--------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Database Search</td>
<td>Title Format (before search): default.nui.mainmenu.label.databasesearch</td>
</tr>
<tr>
<td></td>
<td>Title Format (after search): default.nui.mainmenu.label.databasesearch = &lt;search term&gt;</td>
</tr>
<tr>
<td></td>
<td>View Labels code table – default.nui.mainmenu.label.databasesearch: Database Search</td>
</tr>
<tr>
<td>Newspaper Search</td>
<td>Title Format (before search): default.nui.mainmenu.label.newspapers_search</td>
</tr>
<tr>
<td></td>
<td>Title Format (after search): default.nui.mainmenu.label.newspapers_search = &lt;search term&gt;</td>
</tr>
<tr>
<td></td>
<td>View Labels code table – default.nui.mainmenu.label.newspapers_search: Newspapers</td>
</tr>
<tr>
<td>Citation Path</td>
<td>Title Format (after clicking a Cited or Cited by icon): default.nui.citation_trail.link.header = &lt;search term&gt;</td>
</tr>
<tr>
<td></td>
<td>Results Tile code table – default.nui.citation_trail.link.header: Your current citation path</td>
</tr>
<tr>
<td>My Library Card &gt; Overview</td>
<td>Title Format: default.main.title = menu.myaccount.my_library_card = nui.overview.header</td>
</tr>
<tr>
<td></td>
<td>Header/Footer Tiles code table – default.main.title: Primo by Ex Libris</td>
</tr>
<tr>
<td></td>
<td>User Space Menu code table – default.menu.myaccount.my_library_card: My Library Card</td>
</tr>
<tr>
<td></td>
<td>Library Card Labels code table – default.nui.overview.header: Overview</td>
</tr>
<tr>
<td>My Library Card &gt; Loans</td>
<td>Title Format: default.main.title = menu.myaccount.my_library_card = nui.loans.header</td>
</tr>
<tr>
<td></td>
<td>Header/Footer Tiles code table – default.main.title: Primo by Ex Libris</td>
</tr>
<tr>
<td></td>
<td>User Space Menu code table –</td>
</tr>
<tr>
<td>Page</td>
<td>Title Format and Code Table Information</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| My Library Card > Requests  | **Title Format:**
                               | default.main.title - menu.myaccount.my_library_card - nui.requests.header  
                               | **Header/Footer Tiles code table –**
                               | default.main.title: *Primo by Ex Libris*  
                               | **User Space Menu code table –**
                               | default.menu.myaccount.my_library_card: *My Library Card*  
                               | **Library Card Labels code table –**
                               | default.nui.requests.header: *Requests*                                                                                                                                                                                                   |
| My Library Card > Fines & Fees | **Title Format:**
                               | default.main.title - menu.myaccount.my_library_card - nui.fines.header  
                               | **Header/Footer Tiles code table –**
                               | default.main.title: *Primo by Ex Libris*  
                               | **User Space Menu code table –**
                               | default.menu.myaccount.my_library_card: *My Library Card*  
                               | **Library Card Labels code table –**
                               | default.nui.fines.header: *Fine + fees*                                                                                                                                                                                                   |
| My Library Card > Blocks & Messages | **Title Format:**
                               | default.main.title - menu.myaccount.my_library_card - nui.blocks.header  
                               | **Header/Footer Tiles code table –**
                               | default.main.title: *Primo by Ex Libris*  
                               | **User Space Menu code table –**
                               | default.menu.myaccount.my_library_card: *My Library Card*  
                               | **Library Card Labels code table –**
                               | default.nui.blocks.header: *Blocks + messages*                                                                                                                                                                                               |
| My Library Card > Personal Details | **Title Format:**
                               | default.main.title - menu.myaccount.my_library_card - nui.details.header  

Ex Libris, a ProQuest Company
Ongoing Analytics Improvements (May)

May 2021
As part of our ongoing improvements, the following change was made to Primo Analytics:

- A column for the Sticky Facets Used flag has been added to the Primo Zero Result Searches report.

Additional Enhancements

- **May 2021**
  The labels on the Edit Search Scopes page in the Views Wizard have been changed to reflect the switch to Central Discovery Index (CDI), which replaces our Primo Central Index (PCI).

- **May 2021**
  Course information in a record's Full Display page will no longer link to Leganto reading lists that are not published. To support this functionality, ensure that the display/crsinfo field in your Alma MARC normalization rules checks the CNO $v$ subfield for the **DRAFT** indication as follows:

  ![Normalization Rule for Display/CNO Field in PNX](image)

  **Note**
  To see the effect of this change, a re-index is required.

- **May 2021**
  The following changes have been made to the Institution Wizard to improve the configuration and management of institutional IP addresses in the Institution Wizard:
Filter – A filter has been added to the top of the list to help locate IP addresses in long lists.

Description – This new field allows you to add a description to IP addresses to identify and find specific addresses in long lists.

**Resolved Issues**

**May 2021**
Targeted for Israeli customers: Updated the Hebrew synonyms file with the version that was recently reviewed and approved by MELI (Ex libris' Israel community). In addition, Primo removed the mechanism that sends the name identification to Melingo (Hebrew search plug-in) and instead allows Melingo to identify names by context.

**Resolved Issues**

**May 2021**
Changed the labels used for Analytics actions associated with Primo Central to reflect the move to CDI. The following actions were updated for this release:
- Expand PC Results (Checked) --> Expand CDI Results (Checked)
- Expand PC Results (Unchecked) --> Expand CDI Results (Unchecked)
- SearchScopeType - PC/Deep Search --> SearchScopeType - CDI/Deep Search

**May 2021** SF: 00824464
Added display/creatorcontrib field to the PNX for CDI. This fix will be available on June 9, 2021.

**May 2021**
For CDI, the "pamphlet" resource type is now mapped to "text_resources" in the PNX. This fix will be available on June 9, 2021.

**May 2021** SF: 893530, 914810
In some cases, an incorrect availability status was displayed for records with no full text. This fix will be available on June 9, 2021.

**May 2021** SF: 921417, 931342, 937337
For CDI, one word searches of 6 letters or more that include digits are now searched on additional ID fields so that one-word PMID searches such as "11264061" should now return the corresponding record. This fix will be available on June 9, 2021.

**May 2021** SF: 861480
For CDI search results, the author’s last name was not highlighted correctly in the brief results. This fix will be available on June 9, 2021.

**May 2021** SF: 915611
Email notifications for saved searches in Primo included CDI records from previous email notifications. This fix will be...
available on June 9, 2021.

- **May 2021**
  For CDI, removed the suggestion "mental retardation" from the controlled vocabulary. This fix will be available on June 9, 2021.

- **May 2021** SF: 840420
  In some cases, links for CDI resources in Saved Searches emails returned no results in Primo. This fix will be available on June 9, 2021.

- **May 2021** SF: 922999
  When CDI search results included ProQuest records (sourceid=proquest), the ProQuest logo was returned in the PNX display/source field regardless of the client's alternative coverage. This has been fixed by returning the logo for certain cases only.

- **May 2021** SF: 945320, 945346, 945406, 945566, 946671, 951206, 951876
  Pipes failed when PNX records with <> were encoded as < / > in xml. This has been fixed.

- **May 2021** SF: 941796, 945649, 939947, 945727, 934003, 934821, 933144, 937858, 933432, 946315, 929697, 932917, 939780, 933261, 939129
  Subject data was not displayed when the data was the same in multiple fields. This has been fixed.

- **May 2021** SF: 930881, 944641
  For signed-in users, incorrect dates displayed in My Favorites > Search History when the Save Users Search History parameter was set to N in the Institution Properties mapping table. This has been fixed.

- **May 2021** SF: 453072, 848587, 870300, 397314
  The auto-suggestion display is not consistently closing after a search. This has been fixed.

- **May 2021** SF: 522020, 664760, 676377, 712429, 713981, 727549, 803041, 815855, 898996
  Blank active tab entry in Primo Analytics. This has been fixed.

- **May 2021** SF: 550723, 665114, 698424, 725422, 733684, 752650
  For local Primo environments, viewing more versions of a FRBR group retrieved additional records with incorrect FRBR group ID. This has been fixed.

- **May 2021** SF: 688755
  For local Primo environments, Hebrew terms with an apostrophe were not highlighted correctly. This has been fixed.

- **May 2021** SF: 723331, 728156, 821346, 850894, 865275, 901399
  The Export to Mendeley action did not take the date (year) for some articles. This has been fixed.

- **May 2021** SF: 739809
  Naming and aria labels of navigation regions. This has been fixed.

- **May 2021** SF: 719274, 829850
  Some View It return 0 - 0 of 0, with no rft_dat. This has been fixed.

- **May 2021** SF: 792387, 792469
  No skip links to go from facets to Apply Filters button. This has been fixed.

- **May 2021** SF: 817262
  When using Alternative Code mapping table, pnx+pipes subject area was not considering new code in Primo Analytics. This has been fixed.

- **May 2021** SF: 847592
  The user details for staff users were exposed with the User Settings REST API. This has been fixed.

- **May 2021** SF: 846358, 848001
  All languages in Voice Search Languages Activation mapping table were shown in FE. This has been fixed.

- **May 2021** SF: 859202
  Data from PNX > addata section of was not mapped correctly to CSL. This has been fixed.
In the Primo Analytics Zero Results report, queries were truncated if they contained an ampersand. This has been fixed by replacing the ampersand in the query with its encoding %26.

Incorrect behavior of the Expand my results option. This has been fixed.

Change server details via server.xml file to prevent Network exposure. This has been fixed.

Did You Mean did not appear in CDI, but it displayed in PCI for the same query. This has been fixed.

Permalinks for CDI records with the prefix cdи_webofscience_primary* were erroneously appended with the text CitationCount in Primo, causing the links to fail. This has been fixed.

CDI Hebrew prefix expansion did not include Shin (ש). This has been fixed.

Phrase Matching Improvement in Full Text - Option 2 vs 3. This has been fixed.

Citation searches (the copying and pasting of entire citations into the search box) is too strict in CDI and therefore sometimes fails to retrieve the known item. This was relaxed to allow for more variations and even find the item if text that does not exist in CDI is present in the search string.

In some cases, record IDs were not searchable in Primo even though the record was found with metadata. This occurred because some participant IDs were missing in the logical (merged) record. A process has been added to ensure that all participant IDs are added to the logical record.

Additional parentheses in query failed for CDI searches. This has been fixed.

CDI retrieved 300 M records for an empty query from Primo Search widget. This has been fixed.

Tags in the PNX addata sections caused availability issues. This has been fixed.

Applying prefilter and excluding resource type facet returned incorrect results for CDI. This has been fixed.

In some records, duplicate author names in the PNX appeared twice in the display and also for citation download functions. This has been fixed.

For Search Field Mapping, the "Title contains" query appeared to search the hidden Publication Series Title. This has been fixed.