
Primo VE November 2021 Release Notes

December Sneak Peek

- Best Locations in Get It – per View (NERS) – Libraries can define the order in which the libraries and locations are displayed in Get It.
 - Diversity, Equity, and Inclusion – Enable libraries to hide inappropriate or offensive subject terms.
 - Indexing Local Extension's in Institution Aware mode.
 - Enhance personal details display in Library Card including patrons roles, multiple identifiers and emails.
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Features

Show Journal Coverage Dates in Brief Results and Journal Search (NERS #6718)

November 2021

For electronic journals managed in Alma, you now have the option to display a coverage summary by year in its availability statement in the results on the Library Search and Journal Search pages, reducing the need to view the journal's full display to get coverage information. The coverage summary will include a maximum of three date ranges. If there are more than three, the summary will include the **more** label.

Note

This feature will be available for activation beginning on November 7, 2021.



Coverage Information Displayed in Brief Results

Note

- Because the coverage information is calculated in real time, it will not appear instantly in the results.
 - If a journal is available with no limitations and its portfolios do not contain any date ranges, coverage information will not display in the availability statement.
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- Coverage information may include a single embargo, and if multiple embargoes exist, only one of them will appear in the coverage. If there are more than three date ranges in the coverage, the embargo will be excluded from the coverage if it exists.
- Coverage information is based on the resource's portfolios. It appears mostly for Journals, but it may also appear for other types of resources that contain portfolios.

Configuration Options

This functionality is disabled by default. The following table lists the configuration options associated with this feature.

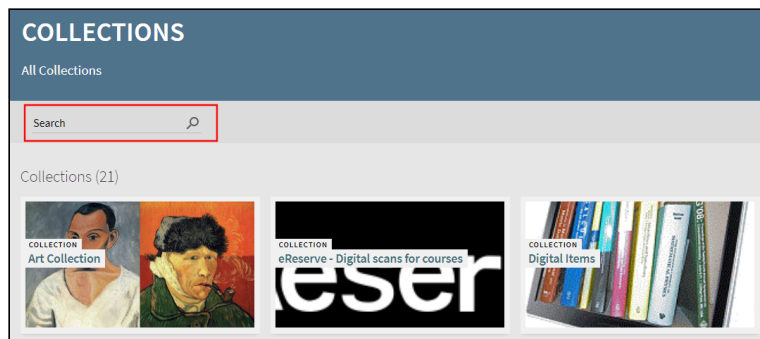
Component	Description
Discovery Customer Settings page (Configuration Menu > Discovery > Other > Customer Settings)	To display the coverage information for electronic journals on the Brief Results and Journal Search pages, set the brief_results_journal_coverage parameter to true .
Calculated Availability Text Labels code table (Configuration Menu > Discovery > Display Configuration > Labels)	<p>The following codes were added to support the customization and translation of the labels used for this functionality:</p> <ul style="list-style-type: none"> • delivery.code.coverage: Coverage: {0} • delivery.code.coverage.from: From {0} • delivery.code.coverage.until: Until {0} • delivery.code.coverage.and_more: and more • delivery.code.coverage.year_not_available: Most recent {0} year(s) not available • delivery.code.coverage.year_available: Most recent {0} year(s) available • delivery.code.coverage.month_not_available: Most recent {0} month(s) not available • delivery.code.coverage.month_available: Most recent {0} month(s) available • delivery.code.coverage.year_month_not_available: Most recent {0} year(s) {1} month(s) not available • delivery.code.coverage.year_month_available: Most recent {0} year(s) {1} month(s) available

Collection Discovery - Searches Across All Collections

November 2021

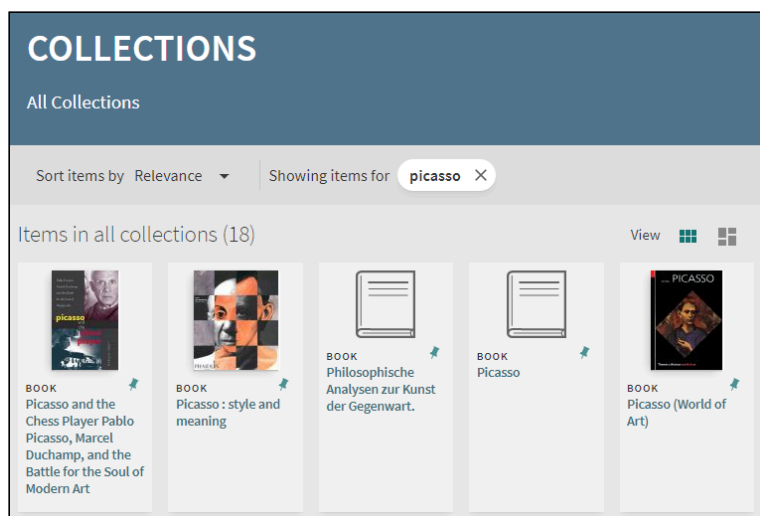
The following improvements have been made to collection discovery in Primo VE:

- Previously, users could search for items within a specific collection or sub-collection only and find items only in that collection or sub-collection. With this enhancement, a search box has been added to the Collections Lobby to allow users to search for items in all collections and their sub-collections in the Collections Lobby.



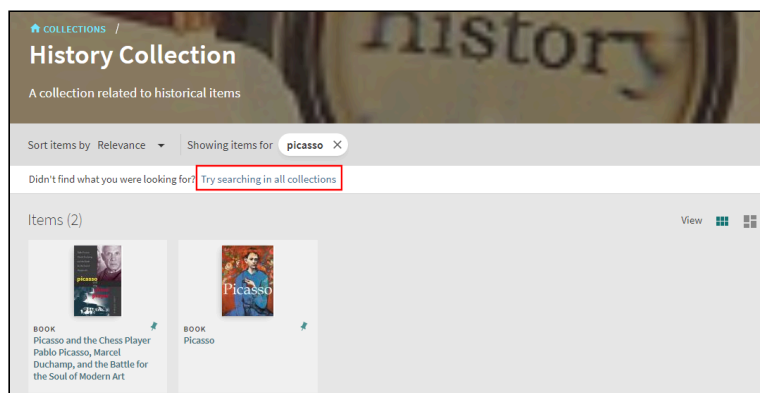
Search Box in Collections Lobby

The following example returns items from all collections and their sub-collections.



Search Results in Collections Lobby

- After performing a search from a specific collection or sub-collection, users can now expand the search to all collections in the Collections Lobby by selecting the **Try searching in all collections** option, which opens the Collections Lobby page and performs the same search in all collections and their sub-collections.



Expand Search to All Collections Option

Configuration Options

This functionality is enabled by default. The following table list additional configurations associated with this functionality.

Component	Description
Collection Discovery code table (Primo Home > General > Code Tables)	<p>The following codes have been added to customize and translate display labels associated with this functionality:</p> <ul style="list-style-type: none"> default.nui.colldiscovery.items.AllCollections.title: Items in all collections default.nui.colldiscovery.items.expandSearch: Didn't find what you were looking for? default.nui.colldiscovery.items.expandSearchLink: Try searching in all collections default.nui.colldiscovery.items.noItemsFound: No items found (0)
aria Labels code table (Primo Home > General > Code Tables)	<p>The following code has been added to support accessibility for the new option to expand the search to all collections:</p> <ul style="list-style-type: none"> default.nui.aria.expandCollectionSearch: Click to expand the search on all collections <p>This label is associated with the hyperlink part of the Try searching in all collections label.</p>

Analytics for Collection Searches

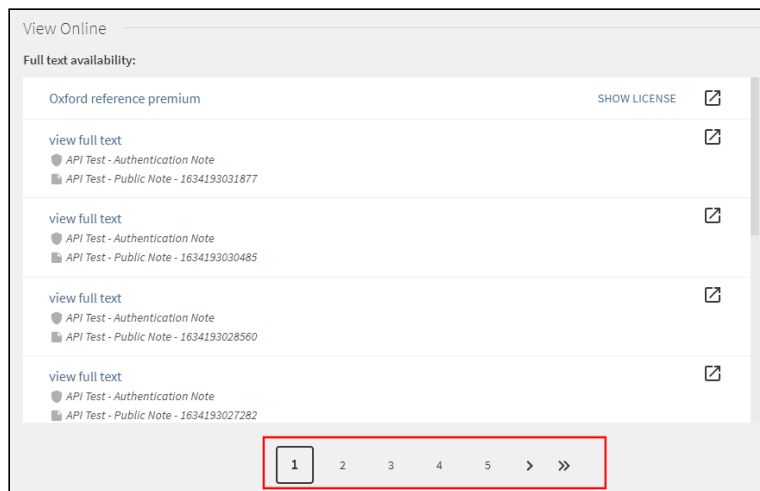
To support this functionality, the following actions have been added to the Action Usage subject area:

Group	Subgroup	Action	Description
Collection Discovery	Collection Discovery	Search in All Collections	User performed a search from the Collections Lobby.
Collection Discovery	Collection Discovery	Click on "Try searching in all collections"	After performing a search within a collection/sub-collection, the user expanded the search to all collections.
Collection Discovery	Collection Discovery	Search in a collection or sub collection	User performed a search within a specific collection/sub-collection.

View It - Show All Results

November 2021

Previously, electronic resources could display a maximum of 25 services in View It. Now you can configure View to display all services. When this functionality is enabled, View It will display 10 services at a time. To view the services, users can either display a specific page by selecting the page number, move to the first (<<) or last page (>>), or move to the previous (<) or next (>) page:



View It on Full Display Page

Configuration Options

This functionality is disabled by default, and View It will display a maximum of 25 services. To enable View It to display all services for online resources, set the **enable_view_it_show_all_results** parameter to **true** on the Alma Customer Parameters page (**Configuration Menu > Resources > General > Other Settings**). For more details, see [Configuring Other Settings \(Resource Management\)](#).

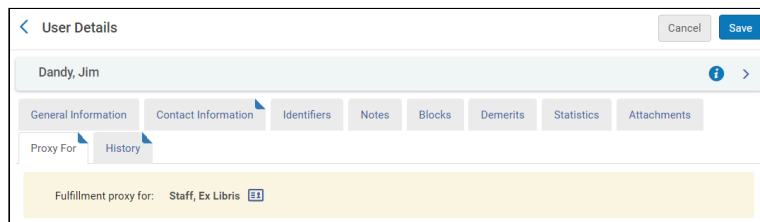
Support Proxy Users in Primo VE

November 2021

A new type of proxy user is introduced, that functions as an extension for the sponsor user: Fulfillment proxies have a proxy account (separate from their personal account, if one exists), with which is used to log on to Primo VE, place hold and resource sharing requests on behalf of their sponsor user, follow up on these requests, be notified when the items reach the hold shelf, and check out items on behalf of the sponsor user. Both the fulfillment proxy and sponsor can view the proxy's requests in My Library Card.

Configuration Options

No configuration is necessary in Primo VE, but the proxy user must be created as a fulfillment proxy user, which is configured by selecting the **Add as Fulfillment Proxy** field and specifying a sponsor in the Proxy Settings section on the Quick User Management page (**Admin > User Management > Manage Users > Add User**). For more information, see [Adding Users in Alma](#) and [Managing Proxy Users](#). Once the proxy fulfillment account is created, the sponsor information appears under the Proxy For tab:



Fulfillment Proxy Indication in Alma

Exclude eBooks from CDI Results (NERS #6702)

November 2021

We have added a configuration option to exclude eBooks from your CDI results. This option is useful if you prefer to use your own eBook catalog records (in your Primo local index) instead of the eBook records from CDI. If you use this option, all eBook records will be filtered from the CDI results and users will see only your eBook catalog records in blended searches. Chapter-level records are not affected and will still be returned as part of the CDI results.

Note

This functionality requires an update to CDI, which will become available with the November 3rd release of CDI.

Configuration Options

This functionality is disabled by default and eBooks will be included in CDI results. If you want to exclude eBook records from CDI results, you must select the **Exclude CDI eBooks** option in each search profile that includes a CDI search scope (such as Central Index) on the Define a Custom Search Profile page ([Configuration Menu > Discovery > Search Configuration > Search Profiles](#)).

The screenshot shows the 'Define a Custom Search Profile' interface. At the top, there are fields for 'Code' (MyInst_and_CI) and 'Display Name' (Search everything). Below this is a 'Description' field with the text 'Blended - All records belonging to your ins'. The main section is 'List of Scopes included in the Search Profile', which contains a table with two rows. The first row is 'CentralIndex' with 'Central Index' as the name and 'All records within your Central Index profile' as the description. The second row is 'MyInstitution' with 'My Institution' as the name and 'All records belonging to your institution' as the description. In the first row, there are two checkboxes: 'Filter by Availability' and 'Exclude CDI eBooks'. The 'Exclude CDI eBooks' checkbox is highlighted with a red box.

Code	Name	Description	Filter by Availability	Exclude CDI eBooks	
1	CentralIndex	Central Index	All records within your Central Index profile	<input type="checkbox"/>	<input type="checkbox"/>
2	MyInstitution	My Institution	All records belonging to your institution		

Define a Custom Search Profile Page

Note

- If you are also using Rapido, this option should not be used.
- When this option is enabled, it is recommended that you do *not* use the **Do not show as Full text in CDI even if active in Alma** option for CDI collection activation. For more information, see [Managing Electronic Resources](#).

Improved Linking Accuracy - Support More Provider IDs for Links Generated via Link Resolver

November 2021

If available, the Alma/SFX link resolvers use provider-specific document IDs instead of metadata to link to full text on the provider's platform to increase the accuracy of links. These provider IDs are part of the OpenURLs sent from CDI to the link resolver. With this release, the following Provider IDs are now supported:

- rft_acsr_id=control/acsr_id

- rft_airiti_id=control/airiti_id
- rft_britnica_id=control/britnica_id
- rft_cairnenc_id=control/cairnenc_id
- rft_cass_id=control/cass_id
- rft_ceeol_id=control/ceeol_id
- rft_ch_id=control/ch_id
- rft_cqvip_id=control/cqvip_id
- rft_credod_id=control/credod_id
- rft_earticl_id=control/earticl_id
- rft_equinx_id=control/equinx_id
- rft_eric_id=control/ericid
- rft_ieee_id=control/ieee_id
- rft_ihp_id=control/ihp_id
- rft_informt_id=control/informt_id
- rft_jstor_id=control/jstor_id
- rft_kiss_id=control/kiss_id
- rft_kluwer_id=control/kluwer_id
- rft_lexislw_id=control/lexislw_id
- rft_nber_id=control/nber_id
- rft_netadv_id=control/netadv_id
- rft_oup_id=control/oup_id
- rft_popups_id=control/popups_id
- rft_sage_id=control/sage_id
- rft_sabinet_id=control/sabinet_id
- rft_scielo_id=control/scielo_id
- rft_scqprss_id=control/scqprss_id
- rft_wanfj_id=control/wanfj_id
- rft_wti_id=control/wti_id

Ongoing Analytics Improvements (November)

November 2021

As part of our continuous effort to improve our data tracking and reporting in Analytics, the following action has been added to the Action Usage subject area to support features added in previous releases:

Group	Subgroup	Action	Description
Results List	General	Reset filters	User reset selected filters.

Additional Enhancements

- **November 2021**

Added 甚 -> 什 to the cjk_unicode_trad_to_simp_normalization.txt file to support its normalization.

Resolved Issues

- **November 2021 SF: 5333028, 5330226, 5328758, 5328757, 5322418, 5310918**
In CDI-Primo blended searches, the CDI book reviews are given less boost by a constant factor of 0.005.
- **November 2021 SF: 963957, 967766**
Pagination arrows in Browse search are not clickable sometimes due to tool tips. This has been fixed.
- **November 2021 SF: 966843, 967613**
The Zotero add-on received the brief list instead of a single record's full display. This has been fixed.
- **November 2021 SF: 881199**
For accessibility, the Digitization Request form did not provide an announcement when opened and when changes were made to the form. This has been fixed.
- **November 2021 SF: 792513**
For accessibility, View Online headings went H4 > H3 > H4. This has been fixed.
- **November 2021 SF: 1002808**
In some cases, Browse by series failed. This has been fixed.
- **November 2021 SF: 964860, 977149, 984468, 986454**
Course Info did not appear in brief record display. This has been fixed.
- **November 2021 SF: 953326**
The discovery_customer_defined_exact_match_field option was not working as expected for Chinese customers. This has been fixed.
- **November 2021 SF: 970599, 997356**
Search API failed for local records when the tab parameter was included in the URL. This has been fixed.
- **November 2021 SF: 960421**
General Use Label text is overlapping other fields and allow inserting text. This has been fixed.
- **November 2021 SF: 860795, 944978**
Search queries that contained a wildcard with numbers and special characters were not returning expected results. This has been fixed.
- **November 2021 SF: 813346**
Subject heading link goes to Expanded non-full-text results in Advanced Search. This has been fixed.
- **November 2021 SF: 889994**
Discovery Database Search page: prevent the display of a duplicated description. This has been fixed.
- **November 2021 SF: 634339**
Multiple Resource Sharing Libraries - wrong pickup library. This has been fixed.