

## Primo VE December 2021 Release Notes

### January Sneak Peek

- Custom Holdings fields for search – Allow libraries to add additional holdings information for search
- Hide Link to Leganto Reading List when Reading List is in draft mode

## Features

### Quicklinks to Full Text for CDI Records

#### December 2021

When enabled, this functionality embeds links to PDF/HTML full text for CDI records directly into the brief display to provide a convenient and quick way for users to access full text with a single click. Quicklinks provides links to both free to read content and paywalled content. For more details, see [Quicklinks in Primo and Primo VE](#).



#### Embedded PDF and HTML Quicklinks for CDI Record in Brief Display

##### Note

- If a record contains Quicklinks, its Unpaywall links will not be displayed.
- Because of inconsistent open access indications, we cannot always identify at the link level which links lead to free to read material. To avoid a problem with users hitting paywalls in the first release of this feature, all Quicklinks are proxied whether they are open access or not. In the longer term, we are working on more accurate ways to identify free to read links and will proxy only those that are paywalled.

### Configuration Options

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

Element	Description
General tab on the View Configuration page ( <a href="#">Configuration Menu</a> > <a href="#">Discovery</a> >	Select the <b>Display Quick Links</b> option to enable these links in the brief display.

Element	Description
<b>Display Configuration &gt; Configure Views)</b>	
Central Index and proxy set-up page ( <a href="#">Configuration Menu &gt; Discovery &gt; Other &gt; Central Index and proxy set-up</a> )	For the initial release of Quicklinks, when a CDI proxy is configured, it will be used for all open access records regardless of the setting of the <b>Do not proxy Open Access records</b> field. For more details, see <a href="#">Configuring Central Index and Proxy Settings for Primo VE</a> .
Aria Labels code table ( <a href="#">Configuration Menu &gt; Discovery &gt; Display Configuration &gt; Labels</a> )	The following code is used for screen readers: <ul style="list-style-type: none"> <li><code>nui.aria.quicklink.PDF</code>: <b>Quick Link to PDF, opens in a new window</b></li> <li><code>nui.aria.quicklink.HTML</code>: <b>Quick Link to HTML, opens in a new window</b></li> </ul>
Full Display Labels code table ( <a href="#">Configuration Menu &gt; Discovery &gt; Display Configuration &gt; Labels</a> )	The following codes are used to customize and translate the display labels for this functionality: <ul style="list-style-type: none"> <li><code>fulldisplay.PDF.tooltip</code>: <b>Get PDF</b></li> <li><code>fulldisplay.HTM.tooltip</code>: <b>Read Online</b></li> </ul>
Links and General Electronic Services Labels code table ( <a href="#">Configuration Menu &gt; Discovery &gt; Display Configuration &gt; Labels</a> )	The following codes are used to customize and translate the display labels for this functionality: <ul style="list-style-type: none"> <li><code>fulldisplay.PDF</code>: <b>Get PDF</b></li> <li><code>fulldisplay.HTML</code>: <b>Read Online</b></li> </ul>

## Analytics for Quicklinks

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

Group	Subgroup	Action	Description
Document	Link	Link to PDF fulltext using CDI Quicklink	The user selected a PDF Quicklink.
Document	Link	Link to HTML fulltext using CDI Quicklink	The user selected an HTML Quicklink.


## Get It - Custom Order of Locations

### December 2021

Previously, the locations in Get It were sorted either by alphabetic order or by best location. For more details, see [Configuring the Order of Locations in Primo Search Results](#). With this enhancement, you can now create a default sort order for all views and override it with custom ordering per view.

Get It

REQUEST: Request / Digitization / Purchase Request

LOCATIONS 

Biology Library Available , Biology Stacks ; ML85 .M97	>
Law Library Available , Stacks ; ML85 .M97	>
Main Library Available , Stacks ; ML85 .M97	>
Music Library Available , Stacks ; ML85 .M97	>

### Get It - Alphabetical Sorting Shown

In addition, the availability statement will now display the name of the preferred location.

## Configuration Options

This functionality is disabled by default. The following table lists the configurations needed to enable custom sorting in Primo VE.

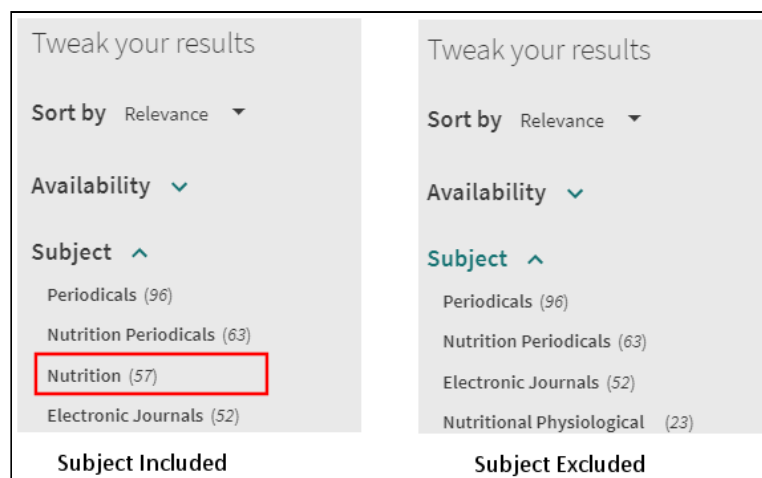
Configuration Option	Description
Locations Ordering Profile ( <a href="#">Configuration Menu &gt; Fulfillment &gt; Discovery Interface Display Logic &gt; Locations Ordering Profile</a> )	<p>To enable custom sorting, set the <b>Use Custom Sorting</b> field to <b>Yes</b> on Alma's Locations Ordering Profile page (<a href="#">Configuration Menu &gt; Fulfillment &gt; Discovery Interface Display Logic &gt; Locations Ordering Profile</a>). When set, this is the default setting for all views in Primo VE.</p> <p>For more details on how to configure custom location sorting, see the following Alma pages:</p> <ul style="list-style-type: none"> <li><a href="#">Configuring the Order of Locations in Primo Search Results</a></li> <li><a href="#">Configuring Physical Locations</a></li> </ul>
Full Record Services tab in View Configuration ( <a href="#">Configuration Menu &gt; Discovery &gt; Display Configuration &gt; Configure Views</a> )	<p>To override Alma's custom sorting above, configure custom sorting for at least one library in your view:</p> <ol style="list-style-type: none"> <li>Edit your view and select the <b>Full Record Services</b> tab.</li> <li>Configure the <b>getit_link1</b> code to open the Custom Locations Sorting dialog box.</li> <li>Select <b>Set custom libraries order</b> to open the Custom Libraries Order mapping table for your view.</li> <li>Add a row for each library and set its library priority (1 = highest priority). All unassigned locations are grouped together and given the lowest priority. Locations are sorted alphabetically in the following order: library priority, location priority, and number of available items. For more details, see <a href="#">Configuring the Get It Service</a>.</li> <li>Save your settings.</li> </ol> <p>For more details, see <a href="#">Configuring the Get It Service</a>.</p>

## Option to Hide Offensive Subject Terms to Support Diversity, Equity, and Inclusion (DEI)

December 2021

This functionality allows you to create a list of inappropriate or offensive words and phrases (in any language) that should be hidden in Subject fields that appear in the full display, brief results, and facets. When configured, the excluded words/phrases are not case-sensitive and must match the contents of the Subject field exactly.

For example, if the word **nutrition** is excluded, Subjects containing only the word nutrition are not displayed, while Subjects that contain the word **nutrition** as part of a phrase (such as **nutrition periodicals**) will continue to be displayed.



### Facets Example

## Configuration Options

The DEI - List of Terms to Exclude from Subject Heading page ([Configuration Menu > Discovery > Other > DEI - List of terms to exclude from Subject Heading](#)) has been added to support this functionality. Per line, add the offensive word or phrase (in any language) that you want to exclude from display in the Subject headings. The exact words/phrases are not case-sensitive. For more details, see [Configuring the DEI Exclude List for Primo VE](#).

The screenshot shows a web form for configuring the DEI exclude list. At the top right are 'Back' and 'Save' buttons. The 'Filename' field is pre-filled with 'DEI - List of terms to exclude from Subject Heading'. The 'Content' field contains the word 'nutrition' and has a large text area below it for additional entries.

### Exclusion List for DEI

## Support Configuration of Additional Personal Details in My Library Card

December 2021

You can now configure and display the following additional details in My Library Card > Personal Details:

- **Display and Add cc Email Addresses** – Alma has the ability to send emails to multiple recipients simultaneously, for example emails addressed to under-aged patrons can also be sent to their legal guardians (see [Managing User](#)

[Contact Information in Alma](#)). With this enhancement, Primo VE users can now view and add cc email addresses to My Library Card > Personal Details. These email addresses will display below the user's preferred email address.

If there are more than five email addresses, users will see the **Show All** option to allow them to display all the additional emails.

My Library Card

OVERVIEW LOANS REQUESTS FINE + FEES BLOCKS + MESSAGES PERSONAL DETAILS

Personal details  
Patron group: Alumni

DISCARD SAVE CHANGES

Default interface language  
English

UPDATE LOGIN CREDENTIALS

Address: 516 High St  
Evergreen Pkwy

City: Bellingham

State: WA

Zip: 98225

Valid From: 09/16/2014

Telephone 1:

My email: nosuchmail@no.such.mail.com

Additional Email Addresses:  
whatever@no.such.mail.cc  
+ ADD NEW ADDITIONAL EMAIL

**Personal Details Tab in My Library Card (Edit Mode)**

- **Display additional account information, and disable display of account expiration date** – In Alma, patron details (such as contact and account information) are stored for each user. With this enhancement, you will now have the option to enable/disable the display of the following details in My Library Card > Personal Details:
  - **User identifiers** – If enabled for display, the user's identifiers (such as social media, institution, and barcode) display on the Personal Details page. If there are more than five identifiers, users can select the **Show All** option to see all identifiers.
  - **User roles** – If enabled for display, the user's roles (such as Patron or User Administrator) display on the Personal Details page. You now have the ability to disable the display of this information in My Library Card. For each user role, the following information displays: scope of the role and expiration date (if defined). If there are more than five roles, users can select the **Show All** option to see all roles.
  - **Account expiration date** – Previously, the expiration date of the user's account displayed by default just below the Personal Details heading on the Personal Details page. You now have the ability to disable the display of this information on the Personal Details page.

My Library Card

OVERVIEWLOANSREQUESTSFINE + FEESBLOCKS + MESSAGESPERSONAL DETAILS

Personal details

Account expires on 2022/11/30 patron group: Graduate Student

EDIT DETAILS

Valid From:

2021/11/20

My email:

S.Bando@gmail.com

Additional Email Addresses:

J.Bando@gmail.com

User Identifiers:

Barcode 53222

User Roles:

Patron

Expiration Date: 2022/10/31

Primo on Alma Platform Demo

Catalog Administrator

Primo on Alma Platform Demo

Resource Sharing Partners Manager

Primo on Alma Platform Demo

Acquisitions Administrator

Primo on Alma Platform Demo

User Administrator

Expiration Date: 2021/12/31

Primo on Alma Platform Demo

Show All

## Configuration Options

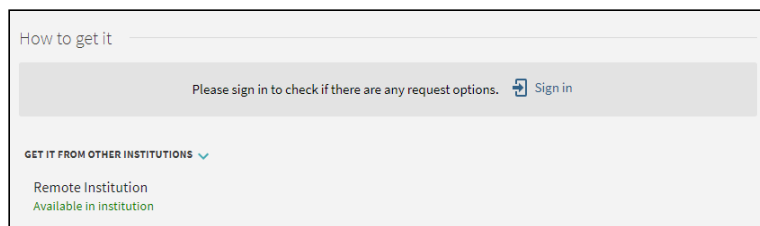
Configuration Option	Description
Personal Details Configuration mapping table (Configuration Menu > Discovery > Library Card Configurations > Personal Details Configuration)	<p>This table allows you to control what is displayed in the Personal Details tab of My Library Card. The following options have been added to support this functionality:</p> <ul style="list-style-type: none"> <li>• <b>Additional Email Addresses</b> – Enables/disables the display of additional email addresses of type <b>cc</b> on the Personal Details page.</li> <li>• <b>Allow add/edit internal emails</b> – Enables/disables whether users can add cc email addresses on the Personal Details page in edit mode.</li> <li>• <b>User Identifiers</b> – Enables/disables the display of the user's identifiers (such a social media, institution, and barcode) on the Personal Details page.</li> <li>• <b>User Roles</b> – Enables/disables the display of the user's roles on the Personal Details page.</li> </ul>

Configuration Option	Description
	<ul style="list-style-type: none"> <li>• <b>User Expiration Date</b> – The expiration date of the user's account is displayed by default. You now have the ability to disable the display of this information on the Personal Details page.</li> </ul> <p>For more details, see <a href="#">Configuring Personal Details Settings for Primo VE</a>.</p>
<p>Personal Settings Labels code table (<a href="#">Configuration Menu &gt; Discovery &gt; Display Configuration &gt; Labels</a>)</p>	<p>This table allows you to customize and translate the display labels that are associated with your personal settings in My Library Card. The following codes have been added for this functionality:</p> <ul style="list-style-type: none"> <li>• contact.additional_email_addresses: <b>Additional Email Addresses:</b></li> <li>• contact.button.show_all_user_additional_email_addresses: <b>Show All</b></li> <li>• contact.button.add_new_additional_email: <b>Add New Additional Email</b></li> <li>• contact.user_identifiers: <b>User Identifiers:</b></li> <li>• contact.button.show_all_identifiers: <b>Show All</b></li> <li>• contact.user_roles: <b>User Roles:</b></li> <li>• contact.button.show_all_user_roles: <b>Show All</b></li> <li>• contact.user_roles.expiration_date: <b>Expiration Date:</b></li> </ul> <hr/> <p><b>Note</b></p> <p>The translations for labels associated with the user roles and identifiers will not be available until the January release. If you need them sooner, you can add them manually.</p> <hr/>

## Primo VE to Primo VE - Include Delivery from Remote Institution

### December 2021

When searching remote institutions, users will now see the availability information at the remote institution and will also receive delivery options if they are signed-in and have permissions at that remote institution. To support this functionality, the remote availability information is displayed in the Get It from Other Institutions section, which may appear under the Get It or How to Get It sections on the record's Full Display page depending on the availability of the record in the local institution.



### Get It - Get It from Remote Institutions

Users can select the availability link to list the locations that contain the item at the remote institution. When signed-in, users will see delivery options based on the configuration of your Alma fulfillment network.

How to get it

Please sign in to check if there are any request options. [Sign in](#)

GET IT FROM OTHER INSTITUTIONS ▾

BACK

< BACK TO LOCATIONS

LOCATION ITEMS

Law  
Available, Level 1 K5032 .J34 2019  
(1 copy, 1 available, 0 requests)

Item in place  
Loanable

## List of Locations at Remote Institution

### Note

Currently, both the local and remote institutions must reside on the same Alma instance.

## Configuration Options

On the Define Primo VE Deep Search Scope page ([Configuration Menu > Discovery > Search Configuration > Search Profiles](#)), the Display Institution Name field has been added to allow the local institution to provide a display name for the remote institution on the Full Display page. For more details, see [Defining a Scope for a Third-Party Index](#).

< Define Primo VE Deep Search Scope Cancel Save

Scope Details ▾

Code \*  Name \*

Description

Remote Environment Details ▾

Environment \*  Institution Code \*

**Display Institution Name \***

### Display Institution Name - Define Primo VE Deep Search Scope Page

The configuration in the remote institution has not changed. For more details, see [Configuring Deep Search in a Remote Primo VE Institution](#).

## Additional Enhancements

### • December 2021

**Limit Search/Facets of Local Extensions to Local Institution** – Previously, local extensions (MARC fields 9XX, 59X, and 69X) were searchable via search and facets from any institution in a consortium. With this enhancement, these local extensions are limited to the local institution only.

### Note

This feature will not become effective until the completion of the next semi-annual indexing, which is scheduled to



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be completed at the end of January 2022.

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- **December 2021**

**Ongoing Analytics Improvements** – As part of our continuous effort to improve our data tracking and reporting in Analytics, the following actions have been added to the Action Usage subject area:

Group	Subgroup	Action	Description
Results List	Sort	Sort by date-newest	User selected to sort results by the newest date first.
		Sort by date-oldest	User selected to sort results by the oldest date first.

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## Resolved Issues

- **December 2021 SF: 5309028, 5317732, 5330766**

Facet checkboxes on IOS devices required a double-tap to include them. This has been fixed, and the exclude button is always visible for facets on mobile devices.

- **December 2021**

The page was not titled according to the area's name after the record's full view was opened and closed. This has been fixed. Note that the **main.title** code is now used instead of the **nui.brief.title** code in the Header/Footer Tiles code table. For more details, see [Configuring the Page Title in Primo VE](#).

- **December 2021 SF: 5301342**

While using JAWS, users were unable to use the content in My Library Card due to an issue with the HTML markup. This has been fixed.

- **December 2021 SF: 5308373, 5307912, 5306053, 5305985, 5305863, 5305312**

Citation trails opened blank page from multi-line advanced searches. This has been fixed.

- **December 2021 SF: 5319260**

Unable to change the order of search profiles on pages other than the first page for a views search profile slots in View Configuration. This has been fixed.

- **December 2021 SF: 5316844, 5323968**

Internal users could not log on to Primo VE. This has been fixed.

- **December 2021 SF: 5303337, 5319554**

Entries are not displayed from resource sharing restriction rules table in NZ. This has been fixed.

- **December 2021 SF: 5312424, 5319042**

An Overdue icon always appeared in the My Library Card > Loans section. This has been fixed.

- **December 2021 SF: 5317883, 5322442, 5322515**

Search terms that have a hyphen were not found. This has been fixed.

- **December 2021 SF: 5300416**

Display Logic rule for Hide full text if exists ANY full text is always hiding the service in Primo VE. This has been fixed.

- **December 2021 SF: 5303159, 5315464, 5319553, 5323985**

Data was missing in Analytics. This has been fixed.

- **December 2021 SF: 5305816, 5316999, 5320573, 5332044**

Direct linking did not work for NZ records that have electronic services. This has been fixed.

- **December 2021 SF: 5298810**

Link to Alma Viewer used Default View instead of Current View. This has been fixed.