

Primo May 2022 Release Notes

Upcoming Issues to Note

Upgrade to Angular 1.8 in Primo/Primo VE – We plan to upgrade from Angular 1.6.10 to Angular 1.8 in the Primo/Primo VE November 2022 release. This upgrade may impact your Angular customizations in Primo and Primo VE and **may require you to adjust the customizations** accordingly prior to the upgrade to ensure a smooth migration to Angular 1.8.

In advance of the November 2022 release, please carefully review the following document to ensure that your Angular customizations are ready for the update in November:

Preparing for the Upgrade to Angular 1.8 in Primo/Primo VE

August Sneak Preview

- Resource Recommender Introduce new Banner resource type
- Collection Discovery Add option to define Collection Discovery per library/view (NERS)
- · Collection Discovery Add Next and Previous to navigate the collection items from full display
- Personal Details and Settings Allow users to set their preference (for example, use my search history)

Features

Give Us Feedback Tool (NERS)

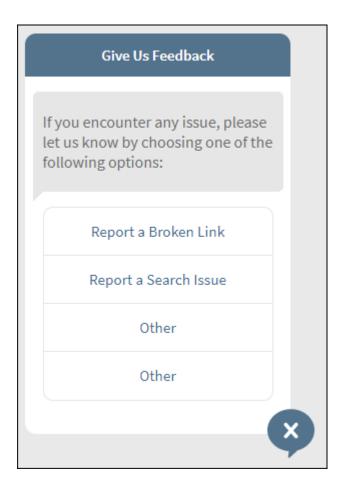
May 2022

Primo now allows end users to report an issue or provide feedback to the library. Once enabled, end users can perform the following steps to send a letter to the feedback manager at the library:

1. To open the feedback tool, select the feedback icon

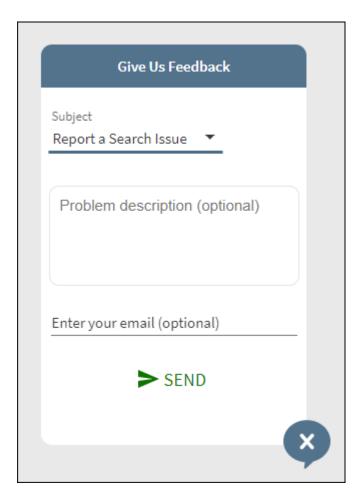


- , which displays at the bottom right corner of the UI. For mobile devices, select **Give Us Feedback** after selecting the ellipsis at the top right corner.
- 2. Select the type of issue (subject) that you are reporting. The institution can configure and display a maximum of four issue types.



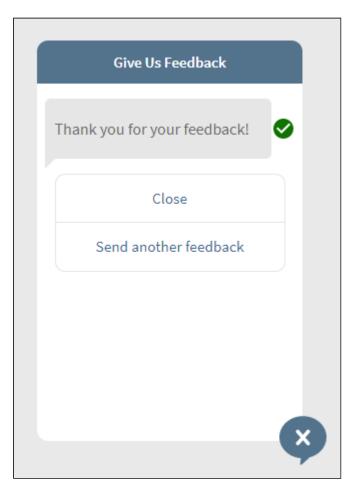
Select Issue Type - Four Issue Types Displayed

- 3. Specify the following information:
 - **Subject** Update the issue type if different from what was entered in the previous step.
 - **Problem description** (Optional) Enter the description of the issue or feedback.
 - **Email** (Optional) Specify your email address to allow the feedback team to get back to you in case more information is needed to resolve the issue or to just let you know that the issue has been received or resolved.



Specify Feedback Details

4. Select **Send** to send the feedback. The following message displays if the feedback is successfully sent to the feedback manager.



Feedback Sent Successfully

5. To close the tool, select either **Close** or the **X** icon. If you want to send another feedback, select **Send another** feedback.

The feedback email includes the following information if provided: sender's email, description, UI page's URL, browser, and device. For example:

Subject: New feedback received from a Primo user - Report a Broken Link

Hello,

You got a new feedback from Jimmy.Johns@gmail.com.

Problem Description: Link is broken in the first record of the search results.

Relevant URL: https://sqa-na01.alma.myinst.com/discovery/
search?query=any,contains,covid%20therapeutics&tab=Everything&search_scope=MyInst_and_CI&vid
Browser: Google Chrome
Device: Desktop

Thank you

* Please note we make the best effort to ensure that this message is error and

virus free.

If you don't trust the sender of this message do not click on any of the above links, respond to the email, or provide any sensitive information.

Sample Feedback from User

Note

The browser and device information is not included if the user does not provide a return email address in the feedback form.

Analytics - Feedback Tool

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

Group	Subgroup	Action	Description	
	Report a Problem	Click on Give Us Feedback	The user opened the feedback tool.	
		Choose category 1	The user selected category 1 (code = default.report.option1).	
			Choose category 2	The user selected category 2 (code = default.report.option2).
		Choose category 3	The user selected category 3 (code = default.report.option3).	
General		1 '	Choose category 4	The user selected category 4 (code = default.report.option4).
		Send feedback	The user sent a feedback.	
		Send another feedback	The user selected the Send another feedback option.	
		Close the Give Us Feedback window	The user closed the feedback tool by either selecting Close or the X icon.	
		Send message was failed due to server error	The user sent a feedback and received an error message.	

Configuration Options

This feature is not enabled by default. The following table lists the configuration options associated with this functionality. For more details, see <u>Configuring the Feedback Tool for the New Primo UI</u>.

Element	Description
Report a Problem mapping table (Primo Home > General > Mapping Tables)	This new mapping table allows you to activate and configure this functionality at the view level only.
Report a Problem Labels code table (Primo Home > General > Code Tables)	This new code table allows you to customize and translate the labels and error messages associated with the Feedback Tool. In addition, it allows you to customize the content of the feedback letter.
aria Labels code table (Primo Home > General > Code Tables)	This code includes the codes that provide accessibility support for this functionality.

Display Multiple Links in View It (NERS)

May 2022

Instead of Primo displaying a single preferred link from CDI, this enhancement allows users to choose from other options to view full text in the View Online section of the record's full display. When this functionality is enabled and CDI returns multiple linking options to view full text, the **Show More** link appears under the preferred linking option.

The following example shows the preferred linking option with the group headings defined:



Multiple Links Collapsed in View Online - No Link to Resource Link from CDI

Selecting the **Show More** option displays additional link options that are grouped in the following order if they exist:

- 1. Direct links from CDI (excluding open access links) return in the following fields of the PNX:
 - 1. **links/linktorsrc** field Only one of these fields is permitted, and if provided, it includes either a Link in Record link or a special template.

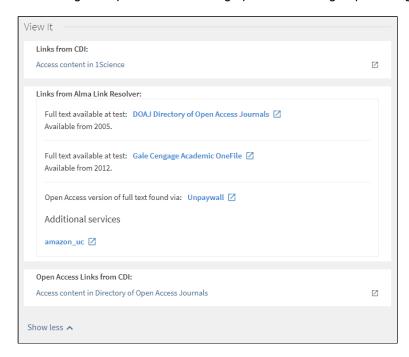
and/or:

- 2. **links/linktorsrcadditional** Multiple occurrences of this field is permitted, and each includes an additional direct link from CDI. These links are sorted by provider, which is returned in the \$\$G\$ subfield.
- 2. Link resolver:
 - 1. OpenURL links from Alma/SFX return in the links/openurladditional field, which is limited to a single field.
 - 2. OpenURL related services from Alma.
- 3. Open Access links from CDI return in one or more **links/linktorsrcadditional** fields. Open access records have the **\$\$H** subfield set to **free_for_read**. These links are sorted alphabetically by provider name, which is returned in the

Note

If the **Do not proxy Open Access records** option is enabled in the Institution Wizard (**Primo Home > General > Institutions List**) and CDI returns multiple links, Primo determines whether a link is open access only if the \$\$H subfield is set to **free_for_read**.

The following example shows all linking options with the group headings defined:



All Links Expanded in View Online

Regardless of whether the feature is enabled, note that the format of the links in View Online/View it has changed slightly:

Old format:



New format:



Configuration Options

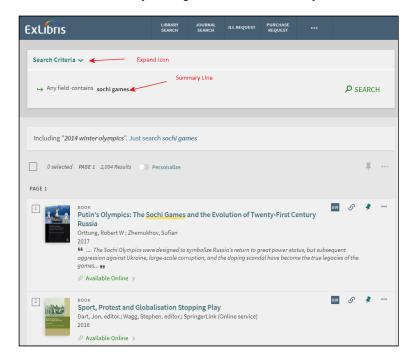
This functionality is disabled by default. For information on how to enable this functionality and configure related settings, see the following table.

Configuration Page	Description			
View Properties mapping table (Primo Home > General > Mapping Tables)	When set to true , the new display_all_links parameter instructs CDI to return all available full text links so that they are selectable in a record's full display. If set to false , CDI returns only the preferred link.			
GetIT! Link 1 Configuration mapping table (Primo Home > General > Mapping Tables)	The following mapping was a Delivery Category Status So Remote Search Resource fulltext_multiple Al	Direct Link	Availability, Service Lin	Link Field
GetIT! Tab 1 Text Configuration mapping table (Primo Home > General > Mapping Tables)	The following mapping was a text links: Delivery Category Remote Search Resource	Status fulltext_multiple	Source	Tab 1 Label
GetIT! Tab1 Labels code table (Primo Home > General > Code Tables)	The following codes define the default.nui.getit_full.mult default.nui.getit_full.mult The following codes allow you default.nui.getit_full.mult default.nui.getit_full.mult	iple_showmore - iple_showless - \$ u to add a section iple_linktorscr_su iple_linkresolver	Show more Show less In heading for earliesc — <blank> — <blank></blank></blank>	each type of link:
Aria labels code table (Primo Home > General > Code Tables)	The following code are used default.nui.aria.fulldispla default.nui.aria.fulldispla default.nui.aria.fulldispla	y.multiple.showm y.multiple.showle	ss – Show les	
Calculated Availability Text Labels code table (Primo Home > General > Code Tables)	The following codes define the default.delivery.code.fulling default.delivery.class.fulling	text_multiple – Fเ	ıll text availat	·

Advanced Search - Improved Visibility of Search Results (NERS)

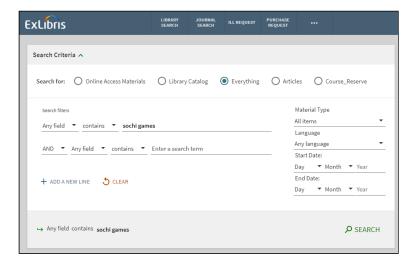
May 2022

After performing an advanced search, the Search Criteria section is collapsed so that search results display more prominently on the page, especially for mobile devices, tablets, and smaller laptops. Users can quickly make changes to their current search by editing fields in the Summary line and then selecting the **SEARCH** button.



Collapsed Search Criteria Section on Advanced Search Results Page

If users would like to make more significant changes to their search query, they can select the Expand icon to display the Search Criteria section as it was displayed previously.



Search Criteria Section Expanded

Configuration Options

This functionality is enabled for you. The following table lists configuration associated with this functionality.

Element	Description
Search Tile code table (Primo Home > General > Code Tables)	The following code was added for the display label of the Search Criteria section on the Advanced Search page: default.nui.search-advanced.searchCriteria - Search Criteria
aria Labels code table (Primo Home > General > Code Tables)	To support accessibility, the following code was added for the display label of the Search Criteria section on the Advanced Search page: default.nui.aria.search.searchCriteria - Search Criteria

Improved CSL Mapping - Differentiate Authors and Creators

May 2022

Previously, there was no distinction made between Author and Contributor names when creating a record's citation. With this enhancement, the Citation export action now includes the role (such as editor or illustrator) if defined in MARC 100 or 700 subfield **e** so that the contributions of each author/contributor is indicated in the citation.

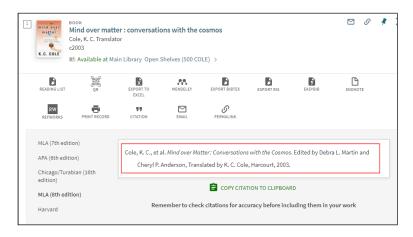
Note

This functionality is applicable to all CSL styles.

For example, if the source record has the following authors and contributors:

```
100 1# $$a Cole, K. C. $$e Translator
700 1# $$a Martin, Debra L., $$e Editor.
700 1# $$a Anderson, Cheryl P., $$e Editor.
```

Its citation appears as follows in the MLA (8th edition) format:

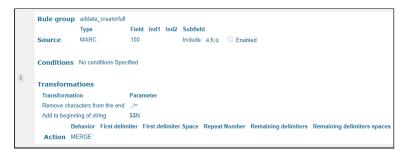


Example Citation in MLA (8th edition) Format

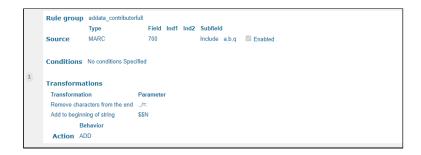
Configuration Options

This feature relies on the following configurations:

- Update your Normalization Rules to include the creatorfull and contributorfull fields, which have been added to
 addata section of the PNX and are used to ensure that citation data is mapped correctly for creators/contributors and
 their respective roles. These fields include the following subfields and suggested mappings:
 - \$\$N (Required) The full name of the creator/contributor.

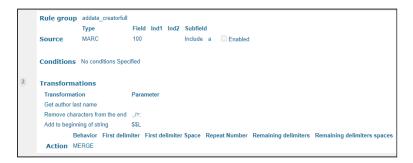


Add \$\$N Subfield to Creatorfull Field

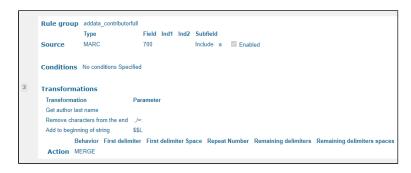


Add \$\$N Subfield to Contributorfull Field

• \$\$L - The last name of the creator/contributor.



Add \$\$L Subfield to Creatorfull Field



Add \$\$L Subfield to Contributorfull Field

\$\$F - The first name of the creator/contributor.

```
Rule group addata_creatorfull
Type Field Ind1 Ind2 Subfield
Source MARC 100 Include a Enabled

Conditions No conditions Specified

Transformations
Transformation Parameter
Get author first name
Remove characters from the end __/=:
Add to beginning of string $$F
Behavior First delimiter First delimiter Space Repeat Number Remaining delimiters Remaining delimiters spaces
Action MERGE
```

Add \$\$F Subfield to Creatorfull Field

```
Rule group addata_contributorfull
Type Field Ind1 Ind2 Subfield
Source MARC 700 Include a Enabled

Conditions No conditions Specified

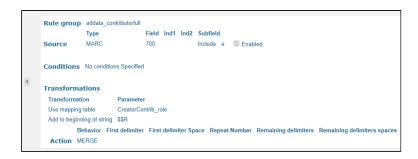
Transformations
Transformation Parameter
Get author first name
Remove characters from the end __/=:
Add to beginning of string $$F
Behavior First delimiter First delimiter Space Repeat Number Remaining delimiters Remaining delimiters spaces
Action MERGE
```

Add \$\$F Subfield to Contributorfull Field

\$\$R - (Required) The role of the creator/contributor, which is mapped using the MARC 100/700 subfield e in the source and the new CreatorContrib_full mapping table.



Add \$\$R Subfield to Creatorfull Field



Add \$\$R Subfield to Contributorfull Field

PNX example:

```
<Creator_full>$$NCole, K. C$$LCole$$FK. C$$Rtranslator
<Contributor_full>$$NMartin, Debra L$$LMartin$$FDebra L$$Reditor
<Contributor full>$$NAnderson, Cheryl P$$LAnderson$$FCheryl P$$Reditor
```

2. Configure the CreatorContrib_role mapping table, which maps the role found in 100/700 subfield e to the \$\$R subfield in the **creatorfull** and **contributorfull** fields. The following table lists the out-of-the-box values:

Source Code (700/100 subfield e)	Target Code (\$\$R)
Writer of accompanying material	secondary contributor
Writer of added commentary	secondary contributor
Interviewer	interviewer
Illustrator	illustrator
Writer of preface	secondary contributor
Writer of added text	secondary contributor
Author	author
Writer of added lyrics	secondary contributor
Composer	composer
Editor	editor
Author of introduction, etc.	secondary contributor
Author of afterword, colophon, etc.	secondary contributor
Author of dialog	secondary contributor
Writer of supplementary textual content	secondary contributor
Translator	translator
Director	director
Author in quotations or text abstracts	secondary contributor
Writer of introduction	secondary contributor
Editor of compilation	editor

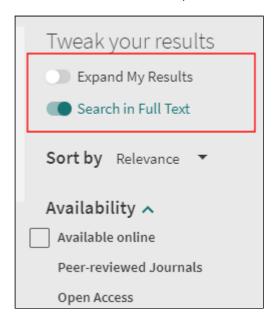
Note

- The case of the letters in the source (subfield e) must match the case specified in the **Source Code** column to return a **Target Code** in subfield \$\$R.
- The supported target codes are author, composer, director, editor, illustrator, interviewer, secondary contributor, and translator.
- Secondary contributors are not sent to CSL.
- Contributors that do not have a role are treated as authors.
- If no roles are specified, all contributors are considered authors and are sent to CSL with the **aulast**, **aufirst**, **auinit**, **au** fields instead of the **creatorfull** and **contributorfull** fields.

Ability to Include or Exclude Full Text Matches in CDI

May 2022

Users now have the ability enable/disable searches within full text to increase performance and to provide a more focused results set. When end user selection is enabled for this feature, the **Search in Full Text** option displays for searches that include the Central Index scope .



Full Text Match and User Override Enabled

Note

- The user's setting of the Search in Full Text slider is persistent for the entire session and applies for all searches
 in CDI scopes even if the user signs in after changing this setting. If Primo's UI page is refreshed, this slider
 returns to its default setting.
- In addition, the **Expand My Results** option has been changed from a checkbox to a slider.

Analytics - Include/Exclude Full Text Matching

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

Group	Subgroup	Action	Description
Results List	General	Search CDI FullText - Activate	The user enabled searches in full text.
		Search CDI FullText - Deactivate	The user disabled searches in full text.
		The name of the Expand CDI Results (Checked) action has been	The user has elected to expand results

Group	Subgroup	Action	Description
		changed to Expand My Results - Activate because this action is now initiated with a slider.	to also include CDI records that do not have full text.
		The name of the Expand CDI Results (Unchecked) action has been changed to Expand My Results - Deactivate because this action is now initiated with a slider.	The user has elected to limit results only to CDI records that have full text.

Configuration Options

By default, this capability is disabled and full text is always checked for matches. The following table describes the configuration options to enable this functionality.

Element	Description
View Properties mapping table (Primo Home > General > Mapping Tables)	The following options are supported for the new CDI_FullText_search parameter: • yes-always – Searches always check full text for matches in CDI records and there is no end user option to disable it. This is the default option. • yes-enduser-selection – Searches always check full text for matches in CDI records, but end users have an option to disable it. • no-always – Searches never check full text for matches in CDI records and there is no end user option to enable it. • no-enduser-selection – Searches never check full text for matches in CDI records, but end users have an option to enable it. Note • For the May 2022 release, if there is no entry for this parameter in the table, the default setting is yes-always for new and existing views. • For the August 2022 release, if there is no entry for this parameter in the table, the default setting is no-always for new and existing views.
Results Tile code table (Primo Home > General > Code Tables)	The following codes have been added to support the customization and translation of labels associated with this feature: • default.nui.expandresults.tooltip.active – Deactivate Expand My Results • default.nui.expandresults.tooltip.inactive – Activate Expand My Results • default.nui.cdiFTsearch – Search in Full Text • default.nui.cdiFTsearch.tooltip.active – Deactivate Search in Full Text

Element	Description
	default.nui.cdiFTsearch.tooltip.inactive - Activate Search in Full Text
aria Labels code table (Primo Home > General > Code Tables)	The following codes have been added to provide accessibility for this functionality: • default.nui.aria.expandresults.active — Deactivate expand my results • default.nui.aria.expandresults.inactive — Activate expand my results • default.nui.aria.cdiFTsearch.active — Deactivate search in full text • default.nui.aria.cdiFTsearch.inactive — Activate search in full text

Support Persistent Suggestions in Resource Recommender

May 2022

Each resource type now allows you to display its recommendations for every search without having to match a searchable tag. These resources appear first, and if more than three suggestions are configured, you can view all persistent suggestions and the other matching suggestions by selecting the **See all suggested resources** link.

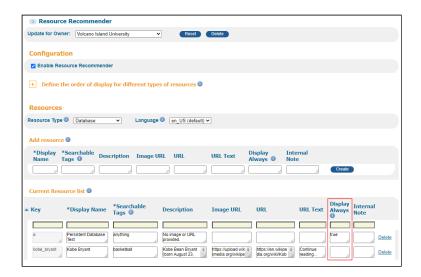
In the following example, the first suggestion on the left is persistent and appears first in the list of suggestions from Resource Recommender:



Persistent Database Resource Displayed First

Configuration Options

To Support this functionality, the **Display Always** column was added to the Resource Recommender page (**Primo Home > FE & Delivery > Resource Recommender**). When set to **true**, the suggestion displays for every search. The order in which it displays in the suggested results is determined by the priority of the suggestion's resource type.



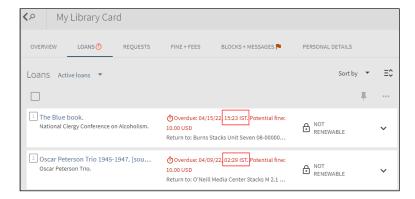
Display Always Column - Resource Recommender Configuration

For more details, see Resource Recommender for Primo.

Additional Enhancements

- May 2022
 Apache 2.4 Upgrade for On-Premises Customers For more details, see <u>Upgrade to Apache 2.4 for Primo PDS</u>.
- May 2022

Display Time Zone for Loan Alerts – You can now display the time zone next to the loan alert date in My Library Card by setting the new **display_loan_timezone** parameter to **true** in the View Properties mapping table (**Primo Home > General > Mapping Tables**).



Time Zone Displayed in Loans Tab

Resolved Issues

May 2022

Times Cited links in the Full View could not be customized at the institution level. This has been fixed, but you should ensure that your wos_citation & scopus_citation links are configured properly at the institution level.

May 2022 SF: 05315482, 05316406, 05817426
 The Days before loan due-date parameter in the Library Card Alerts mapping table (Primo Home > General >

Mapping Tables) was not working as expected. This has been fixed.

May 2022 SF: 5299081

Search for truncated ISBN did not retrieve records. This has been fixed.

May 2022 SF: 5315571, 5315644, 5315646, 5316291

CSL citations needs to differentiate between creators and contributors. See <u>Improved CSL Mapping - Differentiate</u> <u>Authors and Creators</u>.

May 2022 SF: 5332800, 5582421, 5655181

SAML - Support sending SHA-256 logout requests. This has been fixed.

May 2022 SF: 5312816, 5328616

Records with two authors with same first/last name showed only one name in PNX, which affected citations. This has been fixed, but you will need to update your normalization rules and re-index your records to include the new addata/creatorfull and addata/contributorfull fields. For more details, see Improved CSL Mapping - Differentiate Authors and Creators.

• May 2022 SF: 5309629, 5314276, 5325867

Booking requests on mobile devices did not display calendar icon. This has been fixed.

May 2022

When navigating from Library Search to Newspaper Search, persistent facets were not cleared. This has been fixed.

May 2022 SF: 5310424

After clicking the Remember all filters button, the sticky facets tooltip was not working. This has been fixed.

• May 2022 SF: 5332055

Improved citation format for single vs. multiple page citations.

May 2022 SF: 05328629

In Advanced Search, no auditory message was given to JAWS users when the **Search Field** drop-down list was automatically changed to **Title** after selecting **Starts with** from the **Precision** drop-down list. This has been fixed.

May 2022 SF: 05328517

Screen reader was not reading selected values under the prefilter headings in Advanced Search. This has been fixed.

May 2022 SF: 6261743, 6225642, 6048685, 5324926, 5324481, 5314298, 5299990, 5299738

The Link to RefWorks in the User Area menu could not be disabled in mobile view. This has been fixed.

May 2022 SF: 05317749

The new UI may be vulnerable to clickjacking. To reduce vulnerability, add and set the **xframeoptionsset** parameter to **true** in the Institution Properties mapping table (**Primo Home > General > Mapping Tables**) so that X-Frame-Options SAMEORIGIN directive is added to requests.

May 2022 SF: 5307429

While performing an export to BibTex, the Keywords field included an unwanted comma. This has been fixed.

May 2022 SF: 05326867, 05329078

The main region in the search results page did not contain the search results when using JAWS. This has been fixed.

May 2022 SF: 5317457

Full Display was partially opened from My Library Card. This has been fixed.

• May 2022 SF: 5302406

Changed the time recorded in beacon to be the user's request time.

May 2022 SF: 06049652, 05324137, 05305861, 05326288, 06224258, 06036918, 06207657, 06219560, 06230747, 05326278, 05326028, 05318607, 06054869, 06042885

In some cases, the E-mail export action sent email with missing record details. This has been fixed.

May 2022 SF: 5317285

When using the Full text splitter, pipe failed to process records. This has been fixed.

May 2022 SF: 6048782, 6280212

Unpaywall links and Quicklink used the same code for their labels. The following codes have been added to allow Unpaywall links to have different labels:

- default.fulldisplay.unpaywall.PDF has been added to the Full Display Labels code table.
- default.fulldisplay.unpaywall.PDF.tooltip has been added to the Full Display Labels code table.
- default.nui.aria.unpaywall.PDF has been added to the aria Labels code table.

May 2022 SF: 5307369

Citation path was added to the search history. This has been fixed.

May 2022 SF: 6283240, 6298533

In the new UI, Get It or View It was occasionally replaced with Get It or View It of another title when the record was opened in full display. This has been fixed.

May 2022 SF: 06301286

On the Advanced Search page, fields and buttons in the Search Criteria region were not hidden from screen readers when the region was collapsed. This has been fixed.

May 2022

After clicking a lateral link in the record's details and then performing subsequent searches in Advanced Search, the subsequent searches were recorded as lateral linking actions instead of advanced search actions for Analytics. This has been fixed.

May 2022

After specifying an invalid **Start Date** for a publication in Advanced Search, its error message overlapped the **End Date**. This has been fixed.

May 2022

Unable to use the **Space** or **Enter** keys to toggle the **Expand my Results** and **Search in Full Text** settings. This has been fixed.

May 2022 SF: 06349500

Long labels for the **Expand my results** option cut off and partially hidden behind the search results panel. This has been fixed.

May 2022 SF: 05332113

Beginning with 2022-05-22, Primo Analytics no longer tracks the **Display Primo Central versions** action and now uses the **Display FRBR versions** action to track the following scopes: **Primo Local**, **Iocal**, **Primo Central**, **deep_search**, and **blended**.