
Primo VE August 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 documentation/training 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 \(YouTube\)](#)

November Sneak Preview

- Added options to set preferences for Link-in-Record linking for CDI (NERS)
 - Support new Exact Type of “Equals” in the Advanced Search
 - New action - Share
 - Give Us Feedback Improvements
 - Collection Discovery usage in Primo Analytics (NERS)
 - Enrich metadata when exporting to citations for local articles and book chapters
-

Features

Display Collection Discovery for Specific Libraries / Institutions

August 2022

Previously, there was no way to control the display of collections for institutions in a consortium or for libraries by view in a single institution. With this enhancement, collections are now filtered by library as follows:

- On the Collection pages, only the collections/sub-collections that are associated with the relevant library are displayed.
- When searching for items from the Collections Lobby page, only the items that are associated with the relevant library are displayed.
- The collection path that displays for an item on the Full Display page, includes only the paths to collections that are associated with the relevant library.
- The More from the same collection area shows only items that are associated with the relevant library.

Configuration Options

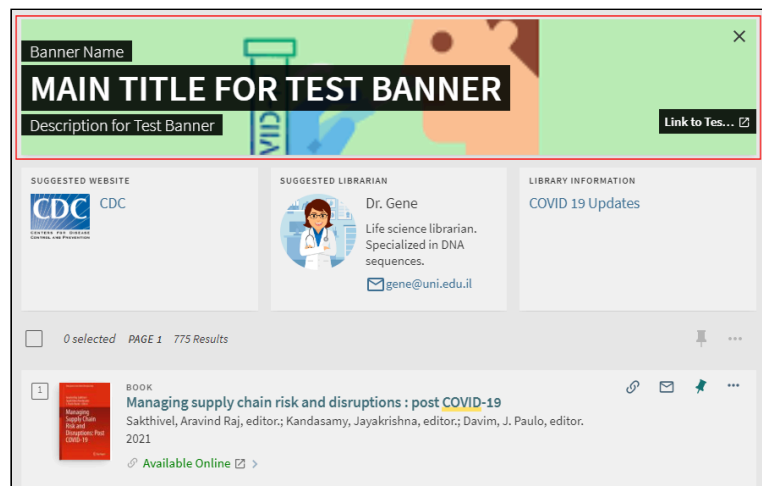
This functionality is disabled by default. Refer to the following table for configuration information.

Configuration Element	Description
Discovery Customer Settings mapping table (Configuration Menu > Discovery > Other > Customer Settings)	<p>Set the view_to_libraries_for_collection_discovery parameter to true to allow collections to be filtered by library/view.</p> <hr/> <p>Note</p> <p>You must also map your views to libraries in your institutions so that they can be filtered accordingly for collection discovery.</p> <hr/>
Primo view mapped into Alma libraries mapping table (Configuration Menu > Discovery > GetIt Configuration > Primo View to Libraries)	Use this mapping table to map the views to libraries in your institutions. For more details, see Configuring the Location Filter List for Get It .

New Resource Recommender Type - Banner

August 2022

The Banner Resource Recommender Type allows libraries to display a persistent banner that spans the entire page and appears above all other recommendations, regardless of priority and persistence. The banner displays the following information: name, title, description, and link.



New Persistent Banner

Users can click the **X** icon to dismiss the banner for the duration of the session.

Note

If more than one banner is configured and active, only the first banner in the list displays above all other applicable suggestions.

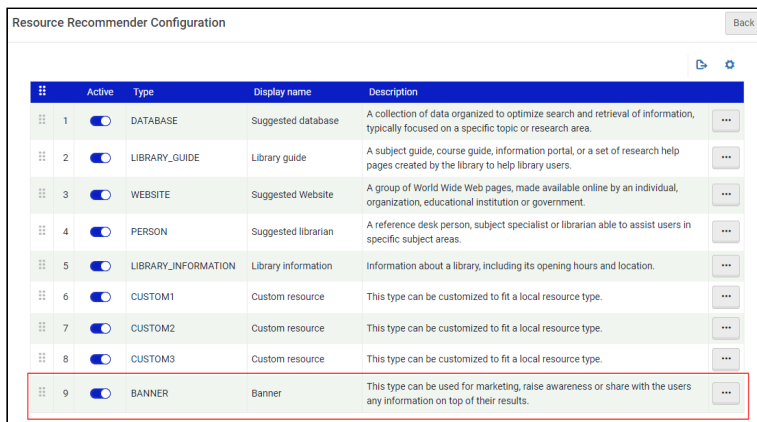
Analytics - Banner Resource Recommender Type

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

Group	Subgroup	Action	Description
Exploration	Resource Recommender	Click on recommended resource - banner	The user selected the banner or its link.
		Resource Recommender Banner appeared	The user performed a search for which the banner appeared.

Configuration Options

To support this functionality, the new Banner type has been added to the Resource Recommender Configuration page (**Configuration Menu > Discovery > Other > Resource Recommender Configuration**). For more details, see [Resource Recommender for Primo VE](#).



Active	Type	Display name	Description
<input checked="" type="checkbox"/>	DATABASE	Suggested database	A collection of data organized to optimize search and retrieval of information, typically focused on a specific topic or research area.
<input checked="" type="checkbox"/>	LIBRARY_GUIDE	Library guide	A subject guide, course guide, information portal, or a set of research help pages created by the library to help library users.
<input checked="" type="checkbox"/>	WEBSITE	Suggested Website	A group of World Wide Web pages, made available online by an individual, organization, educational institution or government.
<input checked="" type="checkbox"/>	PERSON	Suggested librarian	A reference desk person, subject specialist or librarian able to assist users in specific subject areas.
<input checked="" type="checkbox"/>	LIBRARY_INFORMATION	Library information	Information about a library, including its opening hours and location.
<input checked="" type="checkbox"/>	CUSTOM1	Custom resource	This type can be customized to fit a local resource type.
<input checked="" type="checkbox"/>	CUSTOM2	Custom resource	This type can be customized to fit a local resource type.
<input checked="" type="checkbox"/>	CUSTOM3	Custom resource	This type can be customized to fit a local resource type.
<input checked="" type="checkbox"/>	BANNER	Banner	This type can be used for marketing, raise awareness or share with the users any information on top of their results.

New Banner Type

The following table lists additional configuration options for this functionality.

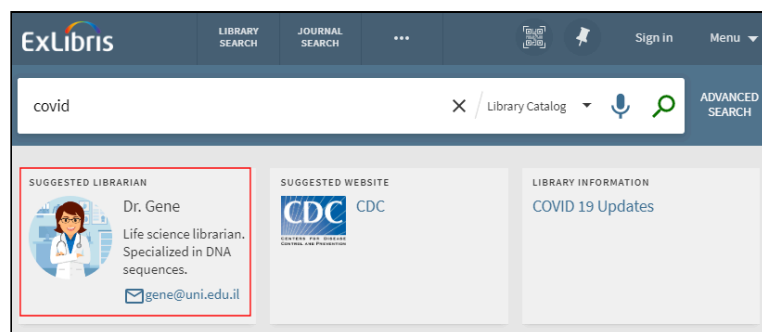
Element	Description
Results Tile Labels code table	<p>The following code has been added to support the tooltip for the banner's X icon, which is used to close the banner for the remainder of the session:</p> <ul style="list-style-type: none"> results.banner.closeBanner – Close Banner
Aria Labels code table	<p>The following codes have been added to support this functionality in screen readers:</p> <ul style="list-style-type: none"> nui.aria.resRecomm.recommendedRsrc.type.label.banner – {Main Title}: {URL text} nui.aria.resRecomm.recommendedRsrc.type.label.closeBanner – Close Banner nui.aria.resRecomm.recommendedRsrc.type.label.bannerAlert – The library has recommended this resource that may interested you: {Main Title}

Support Persistent Suggestions in Resource Recommender

August 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.

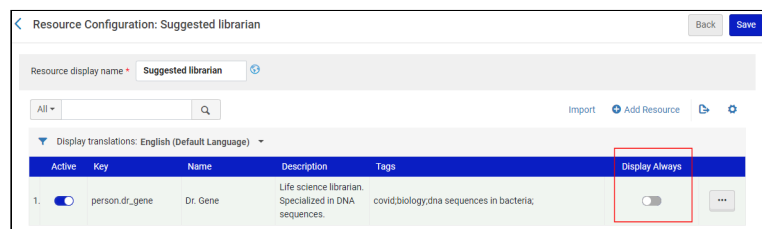
In the following example, the first suggestion on the left is persistent and appears first in the list of suggestions from Resource Recommender:



Persistent Suggested Librarian Resource Displayed First

Configuration Options

To Support this functionality, the **Display Always** column has been added to the Resource Recommender Configuration page ([Configuration Menu > Discovery > Other > Resource Recommender Configuration](#)) to enable persistence at the recommendation level. When selected, 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 VE](#).

Exclude eBooks from CDI Results - Phase 2 (NERS #6702)

August 2022

In November 2021, we 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. Turning on this option filters all eBook records from the CDI results, both in the filtered and expanded searches.

With the second phase of this enhancement, we exclude CDI eBook records only for collections that have portfolios in Alma instead of filtering out all eBook records from the CDI results. Books from database collections will continue to appear in the CDI search results. For example, if you have active collections for Wiley or JSTOR books, these books are not returned by

CDI, but the books from HathiTrust or other collections without portfolios in Alma are returned.

Note

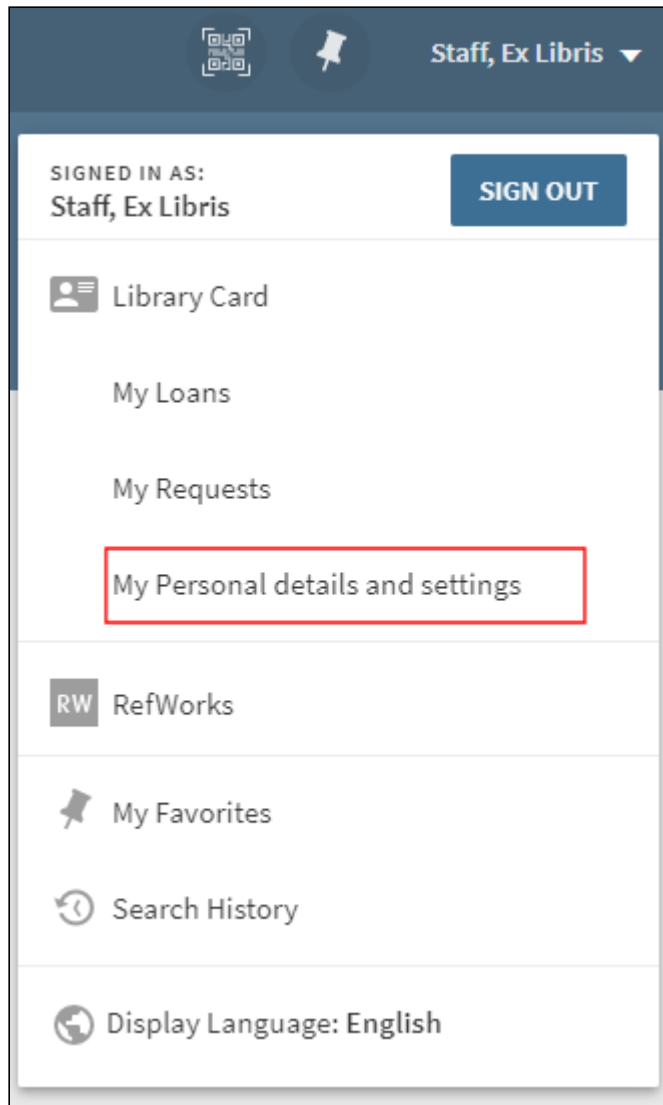
- The **Exclude CDI eBooks** option on the Define a Custom Search Profile page ([Configuration Menu > Discovery > Search Configuration > Search Profiles](#)) remains the same.
 - The functionality will change automatically in CDI with the August 2022 release.
 - When this option is turned on, the CDI books are removed from both the 'Filtered' and 'Expanded' searches for all collections that have portfolios in Alma. Only books affiliated with database collections that you have activated (for full text or search) are included in the CDI search results.
 - This option will still display duplicates when a book record is available from both a database collection and a collection with portfolios (and they are part of the same merged record), regardless of your institution's activations.
-

User Settings for Persistent Search History

August 2022

Primo VE now allows signed-in users to configure whether a user's search history is retained between sessions and whether a user's search history is used for recent search suggestions. To enable this functionality, signed-in users can perform the following steps in the UI:

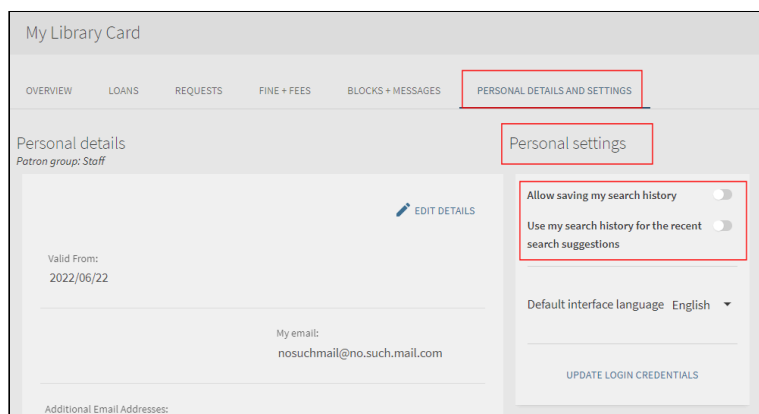
1. Select the new **My Personal Details and Settings** option in the User Area menu to open the [My Library Card > Personal Details and Settings](#) tab directly.



My Personal Details and Settings Option - User Area Menu

2. In the new **Personal Settings** section, configure the following new options:

- **Allow saving my history** – When selected, the user's search history is retained between sessions.
- **Use my search history for the recent search suggestions** – When selected, the user's search history is used to provide recent search suggestions.



Analytics - Persistent Search History

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

Group	Subgroup	Action	Description
General	General	Disable saving search history	The user disabled the Allow saving my search history option in My Library > Personal Details and Settings.
		Disable using search history for search suggestions	The user disabled the Use my search history for the recent search suggestions option in My Library > Personal Details and Settings.
		Enable saving search history	The user enabled the Allow saving my search history option in My Library > Personal Details and Settings.
		Enable using search history for search suggestions	The user enabled the Use my search history for the recent search suggestions option in My Library > Personal Details and Settings.

Configuration Options

This functionality is not enabled by default and requires configuration at the institution level. The following table lists the required and optional configuration associated with this functionality.

Configuration Element	Description
Discovery Customer Settings mapping table (Configuration Menu > Discovery > Other > Customer Settings)	<p>Configuration the following settings to enable persistent functionality in the UI:</p> <ul style="list-style-type: none"> • display_user_settings (new) – Set this field to true to allow users to enable/disable persistent functionality from My Library Card > Personal Details. This functionality is disabled by default. <p>This setting also enables the new My Personal details and settings option in the User Area menu.</p> <ul style="list-style-type: none"> • save_users_search_history (existing) – Set this field to true to display the Allow saving my search history option in the Personal details section and to allow signed-in users to save search history between sessions. • show_recent_search (existing) – Set this field to true to display the Use my search history for the recent search suggestions option in the Personal details section and to allow a user's search history to be used to provide recent search suggestions.
User Tile code table (Configuration Menu > Discovery > Display Configuration > Labels)	<p>The following code defines the label for the new option in the User Area menu:</p> <p>nui.esshelf.menu.userSettings – My Personal details and settings</p>

Configuration Element	Description
My preferences Tile code table (Configuration Menu > Discovery > Display Configuration > Labels)	<p>The following codes define the labels for the new options in the Personal Settings section on the Personal Details tab:</p> <ul style="list-style-type: none"> nui.mypref.label.save_history – Allow saving my search history nui.mypref.label.save_history_suggestions – Use my search history for the recent search suggestions
Error messages code table (Configuration Menu > Discovery > Display Configuration > Labels)	<p>The following code defines the label for the error message that displays if the user settings cannot be saved for any reason:</p> <p>nui.mypref.label.errorSavingSettings – Settings were not saved due to an internal server error; Please try again later</p>
Aria Labels code table (Configuration Menu > Discovery > Display Configuration > Labels)	<p>The following codes support the use of screen readers for this functionality:</p> <ul style="list-style-type: none"> nui.aria.allowSavingHistory – Allow saving my search history nui.aria.useHistoryForRecent – Use my search history for the recent search suggestions nui.aria.myPersonalDetails – My Personal details and settings
Library card Labels code table (Configuration Menu > Discovery > Display Configuration > Labels)	<p>The following codes define the labels for the new sections in My Library Card:</p> <ul style="list-style-type: none"> nui.detailsAndSettings.header – Personal details and settings nui.userSettings.header – Personal settings

reCaptcha Option for Export to Email Action and Give Us Feedback Tool

August 2022

Primo now allows you to add reCaptcha security when using the Export to Email action and providing feedback with the Give Us Feedback Tool.

The screenshot shows a 'Give Us Feedback' form. At the top is a blue header with the text 'Give Us Feedback'. Below it is a 'Subject' dropdown menu with 'Report a Broken Link' selected. There is a large text area for 'Problem description (optional)'. Below that is a text input field for 'Enter your email (optional)'. At the bottom, a reCAPTCHA widget is visible, featuring a checkbox labeled 'I'm not a robot' and the reCAPTCHA logo. This entire widget is enclosed in a red rectangular box. A blue speech bubble with a white 'X' is located at the bottom right of the form.

reCaptcha Enabled in Give Us Feedback Tool

Configuration Options

reCaptcha is not configured out of the box. Please refer to the following table for configuration details. For more details, see [Configuring reCaptcha for Primo VE](#).

Configuration Element	Description
Captcha Keys mapping table (Configuration Menu > Discovery > Other > Captcha configuration)	<p>This new mapping table enables the reCaptcha functionality for the Export to Email action and the Give Us Feedback Tool. To enable reCaptcha in Primo VE:</p> <ol style="list-style-type: none"> 1. Enter the following URL to register your institution and to create your reCaptcha site and secret keys: <code>https://www.google.com/recaptcha/admin/create</code> 2. Open the Captcha Keys mapping table and type the associated key in the following fields: reCaptcha Site key and reCaptcha Secret key. 3. Save your changes
Send Email and Sms Labels code table (Configuration Menu > Discovery > Display Configuration > Labels)	<p>The following codes have been added to this code table to customize/translate the labels associated with reCaptcha:</p> <ul style="list-style-type: none"> • captcha.notselected – *Please Type CAPTCHA Again

Configuration Element	Description
	<ul style="list-style-type: none"> captcha.invalidSiteKey – *reCaptcha Site key is invalid - please check the configuration captcha.publickey – *Public Key Configuration Is Missing captcha.privatekey – *Private Key Configuration Is Missing

Option to Set Secondary Resource Type in Facets and Pre-filters

August 2022

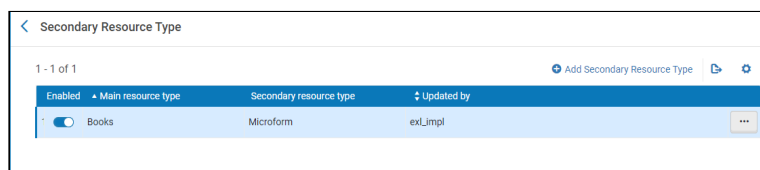
Previously, you could assign only one resource type to a record, which limited the search and facets of resources that fell under multiple categories (such as conference proceedings on ebook, dissertations on audio CD, or collections of archival materials that consist of images, and so forth). With this enhancement, you now have the ability to assign secondary resource types to records to allow these records to be found using facets and search pre-filters. Note that these records will continue to display their main resource type only.

Note

Additional resource types cannot be added to Database and Collection resource types because of the manner in which they are calculated.

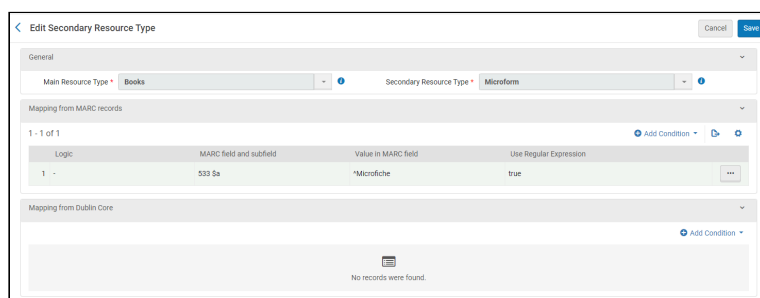
Configuration Options

To support this functionality, the new Secondary Resource Type page ([Configuration Menu > Discovery > Search Configuration > Secondary Resource Type](#)) enables you to assign an additional resource type to records to allow them to be found with a secondary resource type.



List of Configured Secondary Resource Types

For example, if the following secondary resource type is configured, all records matching its criteria are indexed with the **Microform** resource type so that they are included for search and facets only. For more details, see [Configuring Secondary Resource Types for Primo VE](#).



Note

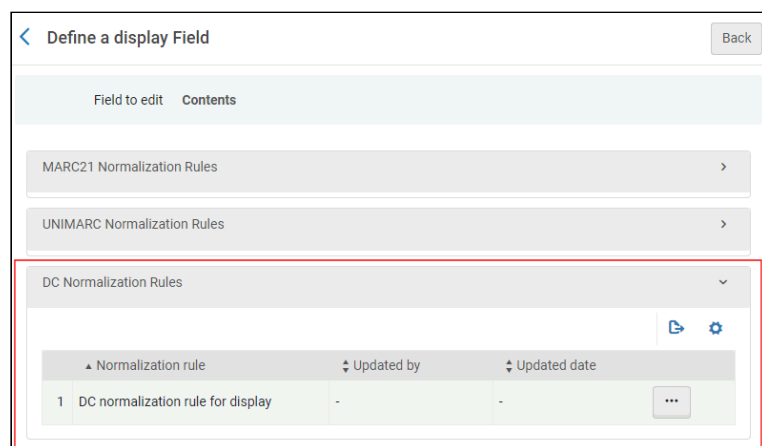
For consortia:

- If secondary resource type rules are set at the IZ level, they are applied to IZ records.
- If the rules are set in the NZ, they are applied to all NZ records

Support Normalization of Display and Local Fields for Dublin Core

August 2022

With this enhancement, customers can now create DC normalization rules to modify the display and search of Display and Local fields on the Manage Display and Local Fields page ([Configuration Menu > Discovery > Display Configuration > Manage display and local fields](#)).



Define a Display Field Page

As with MARC normalizations rules, you can configure only the display rules for Display fields, but with Local fields, you can configure both the display and search/facet rules. For more details, see [Managing Display and Local Fields for Primo VE](#).

The syntax that is used for the DC normalization rules is similar to that used for other Display and Local fields. It is recommended that you use the templates provided for the fields as a guide. The following example shows the default rules used to display the Creator field:

```
rule "prima_display creator- dcterms:creator"
  when
    DCMI is "dcterms"."creator"
  then
    create operational."prima_display"."creator" with
    DCMI."dcterms"."creator"
end
rule "prima_display creator - dc:creator"
  when
    DCMI is "dc"."creator"
```

```
DCMI."dc"."creator"  
end  
  
create operational."prima_display"."creator" with
```

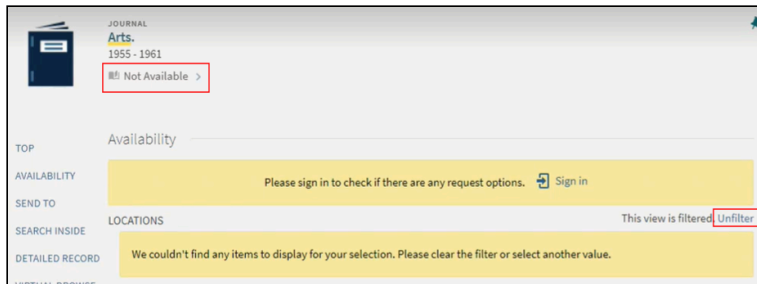
Defaults DC Rules for Creator Field

For more details, see [Configuring Normalization Rules for Display and Local Fields](#).

Support Location Filter in Availability Statement

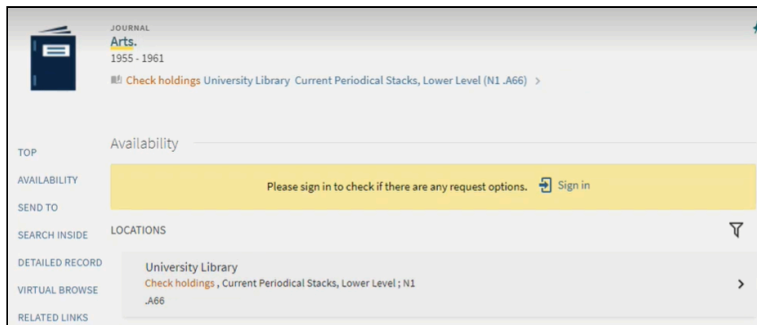
August 2022

Previously, if locations were filtered in Get It using the Primo View Mapped into Alma Libraries page (**Configuration Menu > Discovery > GetIt Configuration > Primo View to Libraries**), the filtered locations appeared in the availability statement that displays in the brief display lines on both the Brief Results and Full Display pages. With this enhancement, the availability statement displays the same locations that are visible in Get It (depending on whether the locations are filtered or unfiltered).



Filtered Availability Statement

If the **Unfilter** option is selected in Get It, the previously filtered locations appear in the availability statement.



Unfiltered Availability Statement

Configuration Options

No additional configuration is necessary. For more details, see [Configuring the Location Filter List for Get It](#).

Support Filtering of Custom Languages in Advanced Search

August 2022

Previously, custom languages were supported only under the Language field of the record's full details and under the Language facet in the results. With this enhancement, you can now configure and filter Advanced Searches by a custom language.

The screenshot shows the 'Search Criteria' interface. Under 'Search for:', 'Library Catalog' is selected. In the 'Search filters' section, the first filter is 'Any field contains' with a search term entered. The 'Material Type' dropdown is set to 'Language', and the 'Language' dropdown is set to 'Altaic (Other)'. There are also fields for 'Start Date' and 'End Date' with day, month, and year selectors. At the bottom, there is a 'SEARCH' button and a summary of the search criteria: 'Any field contains AND Any field contains'.

Advanced Search Page - Language Filter

Configuration Options

This functionality requires you to add the language's code to the Advanced Search Languages Labels code table () and to add the language to the Language filter in Advanced Search. For more details, see [Configuring Austlang and Custom Languages for Primo VE](#).

Support Alphabetic Sort of Subjects in Record's Full Details

August 2022

The subjects that display in the record's full details can now be sorted alphabetically by subject. For example:

Details	Details
Title Merchant organization and maritime trade in the North Atlantic, 1660-1815 Creator Janzen, Olaf Uwe, 1949- > International Maritime Economic History Association. > International Economic History Congress (12th : 1998 : Seville, Spain). > Subject Merchant marine -- History > Merchant marine -- North Atlantic Ocean -- History > Shipping -- North Atlantic Ocean -- History > North Atlantic Region -- Commerce -- History > Genre Merchant marine History Congresses.	Title Merchant organization and maritime trade in the North Atlantic, 1660-1815 Creator Janzen, Olaf Uwe, 1949- > International Maritime Economic History Association. > International Economic History Congress (12th : 1998 : Seville, Spain). > Subject Merchant marine -- History > Merchant marine -- North Atlantic Ocean -- History > North Atlantic Region -- Commerce -- History > Shipping -- North Atlantic Ocean -- History > Genre Merchant marine History Congresses.
Disabled (default)	Enabled

Subject Sort Comparison

Configuration Options

This functionality is disabled by default. To enable it, set the new **subjects_alphabetical_sort_fullDisplay** customer parameter to **true** on the page (**Configuration Menu > Discovery > Other > Customer Settings**).

Ability to Include or Exclude Full Text Matches in CDI

August 2022

Previously, the ability to exclude full text matches in CDI defaulted to the following option for new and existing views: **Search in FT: Yes (Always)**. With this enhancement, new and existing views now default to the following option, which does not search full text in CDI: **Search in FT: No (Always)**. For more details regarding these options,

see [Configuring Search Profiles for Primo VE](#).

Additional Enhancements

- **August 2022 (Added September 14, 2022)**

The following actions have been added to the Action Usage subject area in Primo VE Analytics to support the display of all links from CDI in View It:

Group	Subgroup	Action	Description
Document	Link	Additional openURL	The user selected an additional link in the View It section of the record's full display.
		Additional Link to source	Note When a user selects a link in View It, these actions can occur only if the Display all links from CDI capability is enabled, multiple links are returned from CDI, and the user has first selected Show More .

For additional information, see [Display All Links in Full Display for CDI](#).

- **August 2022**

Primo VE now supports out-of-the-box translations for Ukrainian.

- **August 2022**

Primo VE now maps the MARC 260 \$a and 264 \$a fields to the General search field.

- **August 2022**

The Access Model in Primo VE now supports HTML in the record's full display.

Resolved Issues

- **August 2022 SF: 06385379 (Added August 2, 2022)**

General electronic services were not displayed for records. This has been fixed.

- **August 2022 SF: 06282871**

It was not possible to set distinct placeholder text labels for start/end year fields. The use of one label caused confusion for visually impaired users. This has been fixed.

- **August 2022 SF: 05319118**

No oral announcement provided for dynamically changed content for Item Display in the Get It section. This has been fixed.

- **August 2022 SF: 06390360, 05587616, 05313267, 05312236, 05300667, 05299529**

Cannot open Virtual Browse item when opening a full view from My Favorites. This has been fixed.

- **August 2022 SF: 06388918**

In some cases, the following console error appeared: `Possibly unhandled rejection: canceled`. This has been fixed.

- **August 2022 SF: 06434586**

Beginning with the May 2020 release, for narrow screen widths (such as with mobile devices), citation trail icons appear only in the record's full display and not in the brief results.

- **August 2022 SF: 6305630, 6404667**
IZ shared digital resources were not displaying in NZ Union View & other IZ views. This has been fixed.
- **August 2022 SF: 6370972**
The digital inventory of suppressed record still appeared in the dedup group with Alma-E and Alma-P. This has been fixed.
- **August 2022 SF: 6287084, 6334886**
Quicklinks were not proxied in results of Newspaper Search. This has been fixed.
- **August 2022 SF: 6315839**
Unable to change order of search profiles for Search Profile slot on second page. This has been fixed.
- **August 2022 SF: 6237572**
In Blank ILL form, the fields **Preferred Pickup Location** and **Preferred Local Pickup Location** were not appearing as mandatory. This has been fixed.
- **August 2022 SF: 6292005**
After changing the UI language, two language parameters in calls caused a discrepancy between UI and selected language. This has been fixed.
- **August 2022 SF: 6220188, 6271874**
The language parameter in the URL ("lang") was not changing after sign-in. This has been fixed to use the user's default language.
- **August 2022 SF: 5305017**
Check Availability calendar was different between Alma's Get it and Primo VE. This has been fixed.
- **August 2022 SF: 5324963, 6377420**
Inconsistent formatting in Locations and Location items. This has been fixed.
- **August 2022 SF: 5322973, 6051114, 6344364**
Clarification was provided for the use of HTML in display labels. For details, see [Codes that Support HTML Formatting](#).
- **August 2022 SF: 6051856, 6213501, 6268749, 6346659**
For certain UNIMARC records, adddata/aufirst and adddata/aulast were not created correctly, causing wrong citation format. This has been fixed by including 7XX a, b subfields in the mapping rules.
- **August 2022 SF: 6046919**
Unrelated subfield was added to thumbnail link. This has been fixed.
- **August 2022 SF: 6226824**
The Print action wasn't able to translate the "unavailable" availability status. This has been fixed and will use the following code: **delivery.code.unavailable label**.
- **August 2022 SF: 5323073, 6437494, 6443113**
Add configuration for Captcha option to protect from SPAM Mail for both email and report a problem. See [reCaptcha Option for Export to Email Action and Give Us Feedback Tool](#).
- **August 2022 SF: 5301193, 6338608**
Support Custom language in the Advanced Search Language filter. See [Support Filtering of Custom Languages in Advanced Search](#).
- **August 2022 SF: 5323049, 6023865**
(NERS 7402) Display Collection Discovery for specific libraries / institutions. See [Display Collection Discovery for Specific Libraries / Institutions](#).
- **August 2022 SF: 5333078**
Public Access Model didn't support HTML. See [Additional Enhancements](#).
- **August 2022 SF: 5299770, 5324739, 5332762, 6278621, 6349808**
The New records from last month facet did not include new records from last week. This has been fixed by including

new records from last month and last week.

- **August 2022 SF: 5328439**

Added two drools to the marc2opr for the General search field. See [Additional Enhancements](#).

- **August 2022 SF: 6043491**

Allow normalizing metadata fields for search and Display - DC. See [Support Normalization of Display and Local Fields for Dublin Core](#).

- **August 2022 SF: 06325877, 06362038, 06368862**

In My Library Card, the language parameter in the URL ("lang") was not changed after selecting new interface language. This has been fixed.