

# Primo VE May 2023 Release Notes

### **August Sneak Preview**

- · Linked Data: Person Information Card Display related persons information card based on linked data.
- · Display item policy in Get It.
- FRBR group Highlight the preferred record on the top of list of versions.
- Enhance DEDUP and FRBR definitions to include keys based on local fields.

## **Features**

## Support Customization of Resource Type Mapping (NERS #7790)

#### May 2023

This enhancement enables you to customize the mapping of system resource types in Primo VE. Previously, Primo VE allowed you to create local resource types only. Precedence is given to MARC field/subfield and DC tag mapping conditions in the following order:

- 1. Local resource types Note that this is existing functionality.
- Customized system resource types With this new option, you can add mapping conditions to system resource types
  and also reassign mapping conditions from a system resource type to another system resource type. With the next
  release, you will be given an option to replace a resource type's conditions completely and to change the order of the
  mapping rules.
- 3. Out-of-the box system resource types For mapping details, see <u>Mapping to the Display, Facets, and Search Sections in the Primo VE Record</u>.

For example, if you want to reassign some of the mapping conditions from the **Books** resource type to the **Other** resource type and the **Special** local resource type, you must perform the following:

- Add the conditions that you want to map to the Other resource type.
- Create the **Special** local resource type and include the conditions that you want to map to it.

As a result, Primo VE uses the mapping conditions shown in the Used Conditions column:

Type of Mapping	Resource Type	Mapping Conditions	Used Conditions
Local resource type	Special	Add mapping condition <b>Leader(06-07) = am</b> :	Leader(06-07) = am

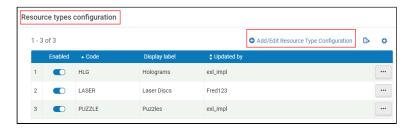
Type of Mapping	Resource Type	Mapping Conditions	Used Conditions
mappings		<ul> <li>MARC field and subfield: LDR</li> <li>Regular expression: ^.(6)am.*</li> </ul>	
Customized system mappings	Other	Add mapping condition  Leader(06-07) = ac or ad:  • MARC field and subfield:  LDR  • Regular expression:  ^.(6)ac ^.(6)ad.*  • Replace existing rules: not selected	Note  Because the Replace existing rules option is not selected, this condition is added to the following out-of-the-box mapping conditions for the Other resource type:  ((Leader(06-07) = ab OR as) AND 008(26) = d w) OR (Leader(06) = m AND 008(26) <> d e h j)
System (Out- of-the-box mappings)	Books	(Leader(06-07) = ac or ad or am) OR (Leader(06-07)= ai as AND 008(21)=m)	(Leader(06-07)= ai as AND 008(21)=m)

#### Note

Since databases and collections are calculated differently, their mappings cannot be customized.

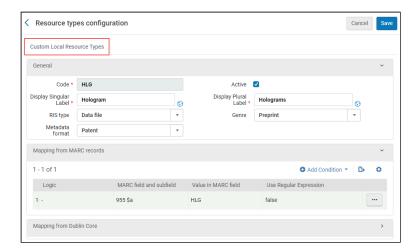
To support this functionality, the following changes were made to the Local Resource Types page (Configuration > Discovery > Display Configuration > Local Resource Types):

The name of the Local Resource Types page has been changed to Resource types configuration (Configuration > Discovery > Display Configuration > Resource types configuration).



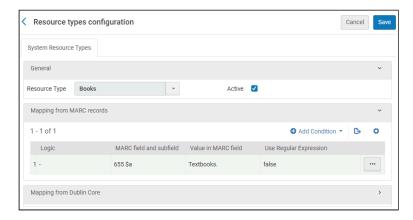
#### **Resource Types Configuration Page**

- The name of the Add Local Resource Type option has changed to Add/Edit Resource Type Configuration.
- The name of the **Edit Local Resource Types** page has changed to **Resource types configuration** and is used for both local and customized system resource types.
- On the Resource types configuration page, the fields used to configure the local resource types have moved to the new **Custom Local Resource Types** tab. For more details, see <u>Configuring Local Resource Types</u>.



#### **Custom Local Resource Types Tab**

The System Resource Types tab has been added to the Resource types configuration page. It enables you to
customize the mapping conditions of the out-of-the-box system resource types. For more details, see
Customizing System Resource Types.



#### **System Resource Types Tab**

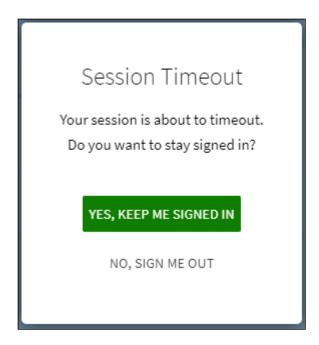
• The maximum number of local resource types that you can configure has increased from 20 to 50.

# Improving the User's Session Timeout Experience (NERS #7809)

#### May 2023

The following options have added to the User Authentication page (Configuration > Discovery > Authentication > User Authentication) to enable users to extend their sessions in the UI:

• Enable extending the session – When selected, users will receive the following warning prompt 60 seconds before timeout, and it will enable them to extend their sessions for another session.



#### **Extend Session Prompt**

If users select Yes, Keep Me Signed In, their sessions are extended without interruption.

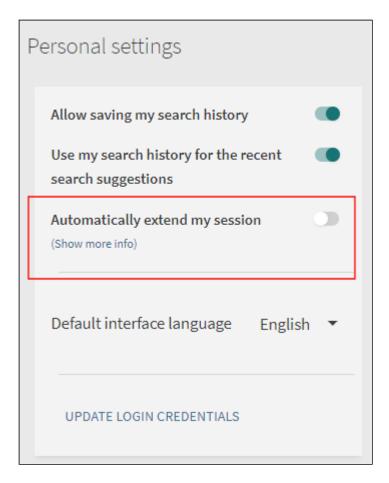
If users select **No, Sign Me Out**, they are signed out, their screens are refreshed, and they are redirected to the configured URL for timeouts.

If users do not respond before timeout, they will receive the following popup message, indicating that their session has timed out:



**Session Timed Out** 

- Enable extending the session to maximum When selected, users will receive a warning prompt 60 seconds before timeout (see messages above), and it will enable them to extend their sessions to the maximum period (which is 7 days and is not configurable). During this time period, users' session will continue until they either sign out or close the browser or the maximum session times out. If users do not want to continue their sessions, the following will occur at timeout: users are signed out, their screens are refreshed, and they are redirected to the configured URL for timeouts.
- Enable user setting for extending the session When selected, this parameter adds the Automatically extend my session option to the My Library Card > Personal Details and Settings tab, which enables users to automatically extend their sessions without being prompted to extend their sessions.



#### **Automatically Extend My Session Option**

#### Note

After enabling/disabling the **Automatically extend my session** option, users must sign out and sign in again to apply the change.

If the session times out while the **Automatically extend my session** option is disabled, users will receive the following popup message and be prompted to either sign in or dismiss the message:



**Personal Settings Reminder** 

### **Additional Configuration Options**

This functionality is not enabled by default. The following table lists additional configuration options associated with this functionality.

Option	Description	
User Authentication page (Configuration > Discovery > Authentication > User Authentication)	The following parameters have been added to support the extension of user sessions:  • Enable extending the session – By default, this field is disabled.  • Enable extending the session to maximum – By default, this field is disabled.  Note  If both of the above parameters are enabled, enable extending the session to maximum has precedence.  • Enable user setting for extending the session – By default, this field is disabled. When set to true, the display_user_settings parameter must also be set to true in the Discovery Customer Settings mapping table (Configuration > Discovery > Other > Customer Settings).  For more details, see Configuring the Login Links for Primo VE.	
User Tile Labels code table (Configuration > Discovery > Display Configuration > Labels)	The following codes were added to support the display functionality for this enhancement:  nui.eshelf.signin.timeoutWarningTitle – Session Timeout  nui.eshelf.signin.timeoutWarning – Your session is about to timeout. Do you want to stay signed in?  nui.eshelf.signin.timeoutExtendSession – Yes, keep me signed in  nui.eshelf.signin.timeoutExtendSessionNo – No, sign me out  nui.login.sessionTimedOut – Your session has timed out  nui.login.sessionTimedOutPersonalSettings – Your session has timed out. Note that you can choose to automatically extend your session under your Personal Settings	
My preferences Tile Labels (Configuration > Discovery > Display Configuration > Labels)	The following codes were added to support the display functionality for this enhancement:  nui.mypref.label.extendMySession – Automatically extend my session  nui.mypref.label.extendMySessionShowMore – (Show more info)  nui.mypref.label.extendMySessionInfo – When enabling this setting, your session will be automatically extended and won't be timed out from any device you are logged in from. In order for this setting to take effect you must log out and login again or refresh the page	
Aria Labels code table (Configuration > Discovery > Display Configuration > Labels)	The following codes were added to support accessibility for this enhancement:  • nui.aria.session.keepMeSigndIn – Yes, keep me signed in  • nui.aria.session.signMeOut – No, sign me out	
Discovery Customer Settings mapping table (Configuration > Discovery > Other > Customer Settings)	As with other options that appear in the My Library Card > Personal Details and Settings tab, the display_user_settings parameter must be set to true to display the Automatically extend my session option.	

### **Analytics - Extend Session Options**

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

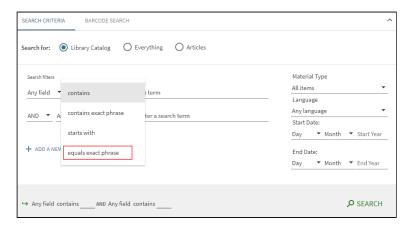
Group	Subgroup	Action	Description
		Enable extending the session automatically for the user	The user enabled the setting to extend the session automatically.
General	General	Disable extending the session automatically for the user	The user disabled the setting to extend the session automatically.
		Click on Show more info for extend my session setting	The user selected ( <b>Show more info</b> ) to display information about the setting.
		Extend the session	The user selected to extend the session.

## Support Exact Phrase Only Searches in Advanced Searches (NERS #6693)

#### May 2023

Previously, the **Is (Exact)** Advanced Search option for Author, Title, and Subject field searches returned results that included the exact phrase, but it could also contain other words. For example, an author search for **"Williams, John D."** may return records with **Williams, John D.** or **Williams, John, d. 1683** in the Author field.

With this enhancement, the name of the **Is (Exact)** Advanced Search option has been changed to **Contains exact phrase**. In addition, users can now specify the new **Equals exact phrase** Advanced Search option that returns results in which the data in the specified Author, Title, or Subject field contains only the exact phrase. For example, an author search for **"Williams, John D."** returns records that contain only **Williams, John D.** in the Author field.



**Equals Exact Phrase Operator for Advanced Searches** 

The new search option also supports special characters. For example, an exact search for "Erpicum, Sébastien" also returns results with Erpicum, Sebastien, and vice versa. In addition, an exact Title search for "Pet" also returns records with the title The Pet.

# **Configuration Options**

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

Option	Description		
View Configuration (Configuration > Discovery > Display Configuration > Configure Views)	On the Advanced Search tab, the following changes were made:  • At the bottom of the page, added section Search Operators, which lists all supported operators. From this section, you can now enable/disable operators and customize their display order on the Advanced Search page. For more details, see Configuring Discovery Views for Primo VE.  • Added the Equals exact phrase operator to the new Search Operators section.  Note  Out of the box, this operator is disabled by default for existing views and enabled by default for new views.  • Added the Use "Equals exact phrase" for hypertext linking (for Title, Author and Subject only) option for the new Equals exact phrase operator. When selected, the new search operator is used instead of the configuration in the Hypertext Linking Definitions mapping table (Configuration > Discovery > Display Configuration > Hypertext Linking Definitions) for display fields using the Title, Author and Subject search index in the Details section of each record's full display. For more details, see Changing the Supported Search Profile Slots for Search Operators.  Note  • The normalization rules were updated for all 6XX subject display fields (and 880-6XX fields) to support the better format of \$Q (search query used when selecting a display field link) when using the new Equals exact phrase operator.  • These changes will become fully available with the completion of the Repository Semi-annual indexing expected to be run in July. For testing in your sandbox environment, you can manually save relevant records for automatic re-indexing.		
Hypertext Linking Definitions mapping table (Configuration > Discovery > Display Configuration > Hypertext Linking Definitions)	<ul> <li>This table provides the institution-level settings for the hypertext linking definitions, which are used for the links in the Details section of each record's full display. To support the new search operator, the following changes have been made:</li> <li>The name of the exact operator has changed to contains exact phrase, and its functionality continues to work as it did previously.</li> <li>If both the Equals exact phrase and Contains exact phrase search operators are disabled in View Configuration, the default search operator contains exact phrase is used from this mapping table unless its definition has been customized.</li> <li>For more information, see Configuring Hypertext Link Definitions for Primo VE.</li> </ul>		
Search Tile Labels code table (Configuration > Discovery > Display Configuration > Labels)	The following codes were added to support the display functionality for this enhancement:  • search-advanced.precisionOperator.option.equalsPhrase – Equals exact phrase  • search-advanced.precisionOperator.option.equalsPhraseTitle – This search type is available only for Title,		

Option	Description
	Author and Subject fields  • search-advanced.precisionOperator.option.startswithTitle – This search type is available only for Title field  The following code was modified to rename the is (exact) option:  • search-advanced.precisionOperator.option.exact – Contains exact phrase
Aria Labels code table (Configuration > Discovery > Display Configuration > Labels)	The following codes were added to support accessibility for this enhancement:  • nui.aria.search.contains – Contains  • nui.aria.search.containsExact – Contains exact phrase  • nui.aria.search.startswithAria – This search type is available only for Title field  • nui.aria.search.equalsPhraseAria – This search type is available only for Title, Author and Subject fields

### Resource Type Filter Bar

#### May 2023

You can enable a new resource type filter ribbon that appears under the basic search box to allow users to filter their results by resource type. For each search profile slot, only enabled resources (maximum of 10) appear for basic searches, and their appearance is not dependent on whether the search results contain items matching that resource type. The first six resource types appear in the ribbon, while the remaining four items are selectable from the **More** drop-down list.



#### Resource Type Ribbon

#### **Note**

- Due to variances in queries and indexing, results from selecting Facet resource types may differ from selecting the same type with the new Resource Type Filter Bar. In an upcoming release, these variances will be aligned to provide the same results for both.
- This filter bar cannot be enabled when either the basic search pre-filter for resource types or indexes is enabled on the Advanced Search tab (Configuration > Discovery > Display Configuration > Configure Views).
- For information regarding the customization of resource type icons, see <u>Customizing SVG Icons</u>.

## **Analytics - Filter Bar**

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

Group	Subgroup	Action	Description
Search	Search	Clicking on a resource type filter bar - <1-11>	The user selected <b>All</b> (position 1) or a resource type (position 2-11) in the Resource Type Filter Bar.
		Clicking on More on the filters bar	The user selected More in the Resource Type Filter Bar.

### **Configuration Options**

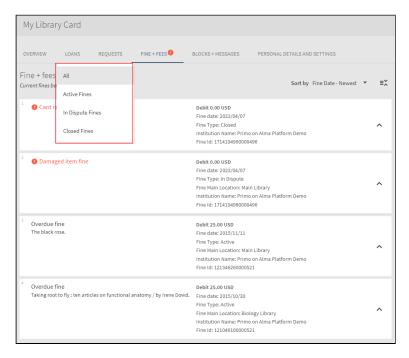
The following table lists the configuration options associated with this functionality.

Option	Description
View Configuration (Configuration > Discovery > Display Configuration > Configure Views)	<ul> <li>On the Brief Results tab, the following changes were made:</li> <li>At the bottom of the page, added section Resource Types Filters Bar, which lists all supported resource types. From this section, you can now enable up to 10 resource types and customize their display order on the Brief Results page. The More drop-down list appears if you enable more than 6 resource types.</li> <li>Added the Enable Filters Bar option above the list of resource types in the new Resource Types Filters Bar section, which enables this functionality in the view. Out of the box, this option is disabled.</li> <li>For more details, see Configuring the Resource Type Filter Bar.</li> </ul>
Results Tile Labels code table (Configuration > Discovery > Display Configuration > Labels)	The following codes were added to support accessibility for this enhancement:  • nui.results.resourcesFiltersBar.All – <b>All</b> • nui.results.resourcesFiltersBar.More – <b>More</b>
Aria Labels code table (Configuration > Discovery > Display Configuration > Labels)	The following codes were added to support accessibility for this enhancement:  • nui.aria.resourcesFiltersBar.All – View all results retrieved  • nui.aria.resourcesFiltersBar.filter – Click to filter the results to {{filter_name}}  • nui.aria.resourcesFiltersBar.More – Click to see more available filters for your search
Advanced Media Type Labels code table (Configuration > Discovery > Display Configuration > Labels)	There is no change to this table, but it configures the display label for Primo VE resource types.

### My Library Card - Filter Fines by Type

#### May 2023

The new Fine Type filter in My Library Card allows users to filter fines based on the following fine types: **Active**, **All**, **Closed**, **In Dispute**, and **Transferred**. The filter does not include all possible fine types, only those that are relevant to the user's current fines and fees. Previously, the Fines and Fees page displayed only the active fines and did not allow users to display fines and fees of other types.



#### Fines Filtered by All Types of Fines/Fees

The Fines Type filter takes the name of the selected fine type and defaults to **Active Fines**. If there are only active fines, the Fines Type filter does not appear.

### **Analytics - Filter Fines**

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

Group	Subgroup	Action	Description
	ral My Account	Fines and Fees - Active fines	The user selected the <b>Active Fines</b> filter in My Library Card > Fines & Fees.
		Fines and Fees - Closed fines	The user selected the <b>Closed Fines</b> filter in My Library Card > Fines & Fees.
General		Fines and Fees - Transferred fines	The user selected the <b>Transferred Fines</b> filter in My Library Card > Fines & Fees.
		Fines and Fees - In dispute fines	The user selected the <b>In Dispute Fines</b> filter in My Library Card > Fines & Fees.

Group	Subgroup	Action	Description
		Fines and Fees - All	The user selected the <b>All</b> filter in My Library Card > Fines & Fees.

## **Configuration Options**

This functionality does not require configuration to enable it. The following table lists the configuration options associated with this functionality.

Option	Description
Library card Labels code table (Configuration > Discovery > Display Configuration > Labels)	The following codes were added to support accessibility for this enhancement:  • nui.fines.active – Active Fines  • nui.fines.closed – Closed Fines  • nui.fines.transferred – Transferred Fines  • nui.fines.indispute – In Dispute Fines  The following code is used to display the balance that appears under the active fines when users do not have have active fines, but they do have transferred fines that are reported in the total balance:  • nui.fines.noActiveWithBalance – <b>Note:</b> additional fines are located under "{0}"
Aria Labels code table (Configuration > Discovery > Display Configuration > Labels)	The following codes were added to support accessibility for this enhancement:  • nui.aria.account.fines.types – Select fine type
Alma's Fulfillment Customer Parameters mapping table (Configuration > Fulfillment > General > Other Settings)	When the existing allow_activity_on_transferred_finesfees parameter is set to true, all active Transferred fines and fees are also included in each user's balance in My Library Card.

# Ongoing Accessibility Improvements (May)

#### May 2023

As part of our continuous effort to comply with Web Content Accessibility Guidelines 2.1 Level AA, we have fixed the following color contrast issues for this release:

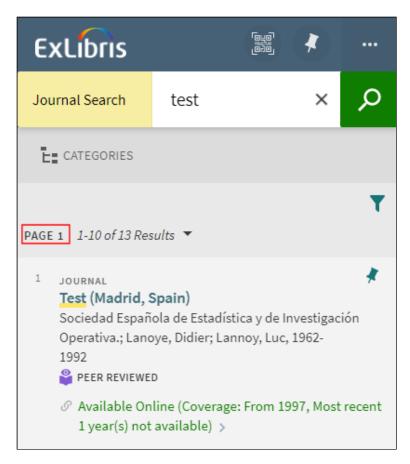
Issue ID	Description
1110223	Pickup location in Request section – The contrast ratio between text and its background was not at least 4.5:1. This has been fixed by adjusting the text and/or background to increase the contrast to at least 4.5 to 1.

Issue ID	Description
1113855	Available in institution in Full Display – The contrast ratio between link or button text and its background was not at least 4.5:1 on hover and/or on focus. This has been fixed by adjusting the color of the hovered or focused link or button text and/or background to increase the contrast to at least 4.5 to 1.
1114142	Error messages in Request and Resource Sharing section – The contrast ratio between text and its background is not at least 4.5:1. This has been fixed by adjusting the text and/or background to increase the contrast to at least 4.5 to 1.
1123820	Links in How to Get It! section – The contrast ratio between link or button text and its background was not at least 4.5:1 on hover and/or on focus. This has been fixed by adjusting the color of the hovered or focused link or button text and/or background to increase the contrast to at least 4.5 to 1.
1102713	Elements did not have sufficient color contrast. This has been fixed by adjusting the color contrast to at least 4.5 to 1.
1108274	Fully adheres to international copyright laws in Resource Sharing section – The contrast ratio between text and its background is not at least 4.5:1. This has been fixed by adjusting the text and/or background to increase the contrast to at least 4.5 to 1.
1113759	Apply Filter button in Tweak you Results section – The contrast ratio between link or button text and its background is not at least 4.5:1 on hover and/or on focus. This has been fixed by adjusting the color of the hovered or focused link or button text and/ or background to increase the contrast to at least 4.5 to 1.
1124195	bX image in the Related reading section – All or portions of text over an image do not meet the minimum 4.5:1 contrast requirement. This has been fixed by adjusting the text and/or background to increase the contrast to at least 4.5 to 1.
1099610	Elements did not have sufficient color contrast – This has been fixed by adjusting the color contrast to at least 4.5 to 1.

# **Additional Enhancements**

• May 2023 SF: 06733268

**Page Number Realignment in Journal and DB Search Results** – For mobile devices, the page number for Journal and Database search results now displays next to the record count instead of below it.



• May 2023 SF: 06396746, 06427160, 06458573, 06486037, 06577004

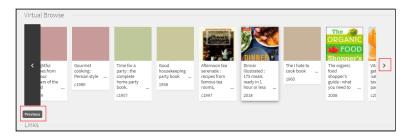
Filter by Availability for Newspaper Search – This enhancement enables you to configure whether Newspaper Search can return articles that are not available to the institution. To support this functionality, the Newspapers Search Filter By Availability field has been added to the General tab on the View Configuration page (Configuration > Discovery > Display Configuration > Configure Views). For more details, see Configuring Discovery Views for Primo VE.

#### May 2023

**Support Translation of Navigation Links in Virtual Browse** – The following codes have been added to the GetIT! Tab1 Labels code table to translate the mouse over labels for the Previous and Next icons in the Virtual Browse section of the record's full display:

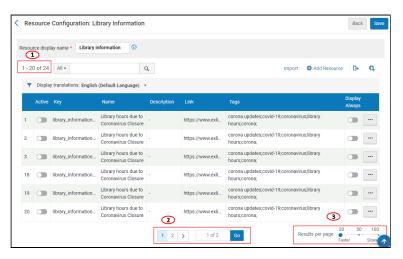
Code	Description
brief.results.tabs.browseshelf.previous	Previous
brief.results.tabs.browseshelf.next	Next

The follow example shows the mouse over label for the Previous icon:



#### **Mouse Over Label for Previous Icon**

- May 2023 SF: 06293589, 06360357, 06584375
   Improve the Usability of Resource Recommender Administrative or Management Pages The following enhancements have been added to Resource Recommender configuration to improve usability and performance:
  - On the Resource Configuration page for each type of resource, pagination is now used to limit the number of recommendations to 20, 50, or 100 per page so that it is not necessary to load all recommendations before performing any action on the page (such as changing the language or searching for a specific recommendation).



#### Pagination in Resource Recommender

The paging functionality includes the following elements:

- 1. **Number of recommendations** Displays the numbers of the currently listed recommendations and the total number of recommendations.
- 2. **Pagination bar** This bar displays only when there are more than 20 recommendations, and it enables users to navigate between pages of recommendations.
- 3. **Results per page** This slider bar displays only when there are more than 20 recommendations, and it enables users to set whether a page displays a maximum of 20, 50, or 100 recommendations. This setting is saved between sessions for each recommendation type.
- Imports that include more than 500 recommendations will now run in the background. When complete, an email is sent to the user. In addition, you can check the progress of the new Resource Recommender Import job on Alma's Monitor Jobs page in the Running or History tabs (Admin > Manage Jobs and Sets > Monitor Jobs).
- May 2023

**Retrieve Analytics Report** – This enhancement allows you to use an API to return a Primo VE Analytics report in XML. For more details, see <u>Analytics</u> in the Ex Libris Developer Network.

### Resolved Issues

May 2023 SF: 6287334

The aria-label was missing for the **Add this item** button. This has been fixed.

May 2023 SF: 6287354

The aria-label was missing for the display check boxes button. This has been fixed.

• May 2023 SF: 6293256

During Citation exports, addata/title field was not present for content type patent, audio. This has been fixed.

• May 2023 SF: 6538249

External links had role=link instead role=button. This has been fixed.

May 2023 SF: 6538263

Exclude filter button/indication should be 'del' instead of 'strong'. This has been fixed.

May 2023 SF: 6247313, 6569462

External Alma-P records appeared as available online instead of Available in library. This has been fixed.

May 2023 SF: 6288870

The View management role could not see and edit labels. This has been fixed.

May 2023 SF: 6351400 (Updated June 14, 2023)

The normalization of local facet values was not disabled. This has been fixed, but it requires re-indexing.

May 2023 SF: 6330518, 6614468

View it showed the label code instead of the description. This has been fixed.

May 2023 SF: 6348399, 6373989

The same records with the same MMS ID appeared in the Virtual Browse section of the record's full display. This has been fixed.

May 2023 SF: 6456214

Repeated and duplicated saved search email for the same alert. This has been fixed.

May 2023 SF: 6428437

The last collection item was missing in full display. This has been fixed.

May 2023 SF: 6439205

Google Books thumbnails were not displayed when regular expressions were used. This has been fixed.

May 2023 SF: 6534943

Digital representation thumbnails were not displayed. This has been fixed.

May 2023 SF: 6568889

Primo VE failed to properly build a citation from an OpenURL that included a ")" character. This has been fixed.

• May 2023 SF: 6597295

Not all links to resource displayed in Full Display or permalink of Search Webhook record. This has been fixed.

May 2023 SF: 6618232

New Search Profile Slots were not returning results and displayed endless diamonds. This has been fixed.

May 2023 SF: 6635757

When all My Favorites records were deleted, the record count was not zero. This has been fixed.

• May 2023 SF: 6666047

Full display links did not work with a Webhook. This has been fixed.

• May 2023 SF: 6670595

The Springer Holdings File job failed. This has been fixed.

May 2023 SF: 6678087

Additional dash in the page header in Hebrew. This has been fixed.

• May 2023 SF: 6679847

Search results of Search Inside functionality returned the wrong language of UI. This has been fixed.