

# What's New for Primo/Primo VE

2023 Q2 - Primo Product Team



# Highlights



- Resource Types Filter Bar
- Improving the User's Session Timeout Experience
- Support Customization of System Resource Type Mapping
- Advanced Search - New operator "Equals exact phrase"
- My Library Card – Option to Filter by Fine Status
- Additional Notable Items & Updates

# Primo - What's New

## Primo and Primo VE

Resource Types Filter Bar

Improving the User's Session  
Timeout Experience



CDI – AI Assisted Citation Parsing

Ongoing Accessibility Improvements

## Primo VE

Advanced Search - New operator  
“Equals exact phrase”

NERS



Support Customization of System  
Resource Type Mapping

NERS



My Library Card – Option to Filter by  
Fine Status

API to Retrieve Analytics Report

Improved Usability of Resource  
Recommender Management

# Primo & Primo VE Release Schedule

- Primo May 2023

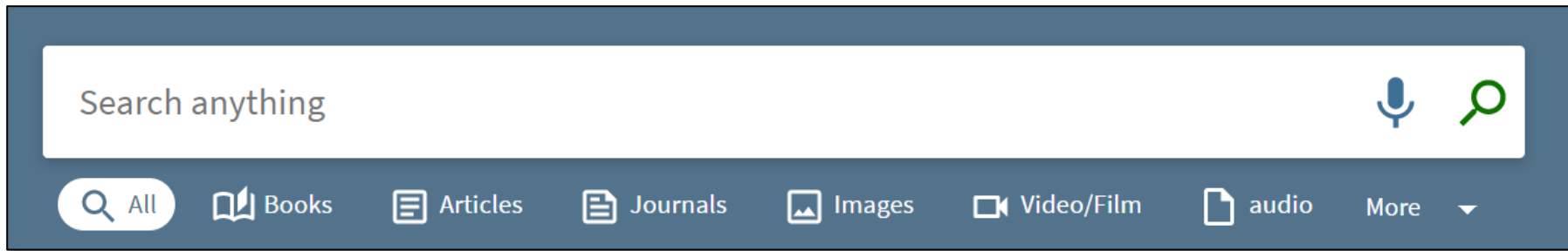
Quarterly Release	MT Sandbox	Total Care (TC)	MT Production	Local
May 2023	April 23, 2023	April 30, 2023	May 7, 2023	May 21, 2023

- Primo VE Release Schedule

Monthly Release	Sandbox Release	Production Release	Release Update	Release Type
March 2023	February 19, 2023	March 5, 2023	-	Resolved Issues Analytics
April 2023	March 19, 2023	April 2, 2023	-	Resolved Issues Analytics
May 2023	April 23, 2023	May 7, 2023	May 14, 2023	<b>Feature Release</b> Resolved Issues

# Resource Types Filter Bar

Introduce new Resource Types Filters under the Search Bar, allowing users to easily narrow their search results by selecting one of these main resource types.



Library can select up to 10 resource types (systems or local ones) to show under the Search Bar

Library can map which resource types will be displayed for each search scope

Users can use the new filter bar for main resource type and the facet Resource Types as secondary resource types

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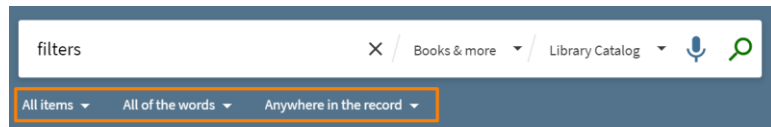
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# Resource Types Filter Bar

- Resource types will be displayed in the filter bar as pre-defined irrelevant if results were found
- Customers can customize the icons

```
<svg id="<icon-id>" viewBox="0 0 24 24"><path  
xmlns="http://www.w3.org/2000/svg" d="<new-svg>" /></svg>
```

- You can use either the
  - new Resource Types Filter bar or
  - basic search pre-filter
- Analytics:
  - usage per location
  - Checking option to have usage per type -



# Improving the User's Session Timeout Experience

Introduce new settings to notify the users upon session timeout, allowing them also to extend future sessions automatically

Users will receive a message 60 seconds before timeout, and it will allow them to extend the session for another session period

Upon session time out, guide the users with new settings to extend future sessions automatically

Your session has timed out. Note that you can choose to automatically extend your session under your Personal Settings



SIGN IN



DISMISS

Add a new toggle in the Personal Settings:  
**Automatically extend my session**

Personal settings

- Allow saving my search history ☒
- Use my search history for the recent search suggestions ☒
- Automatically extend my session ☒**  
(Show more info)  
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

Session Timeout

Your session is about to timeout.  
Do you want to stay signed in?

**YES, KEEP ME SIGNED IN**

NO, SIGN ME OUT

\*Coming from NERS #77809 - [Ideas Exchange](#)

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\* Subject also to timeout policy of library's remote authentication system

# Support Customization of System Resource Type Mapping

You can now custom the mapping of system resource types  
Your new custom mapping rules will be checked prior to system's mapping

For example: Library would like to change the mapping  
of system resource type: **conference proceedings**

View the mapping of  
conference\_proceedings  
in [documentation](#)



Define your mapping rules :  
add additional mapping to the existing one

conference_proceedings	008(29) = 1
------------------------	-------------

999 = ""conferenceproceeding""
--------------------------------

\*Coming from NERS #7790 - [Ideas Exchange](#)

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# Support Customization of System Resource Type Mapping

NERS



Resource types configuration

Custom Local Resource Types | System Resource Types

General

Resource Type: Conference Proceedings

Active: ☒

Replace existing rules: ☐

Mapping from MARC records

1 - 1 of 1

Logic	MARC field and subfield	Value in MARC field	Use Regular Expression
1. -	999 \$a	conferenceproceeding	false

Local Resource Type Mapping

Custom System Resource Type Mapping

OTB System Type Mapping

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

With the June 2023 release, we will provide options :

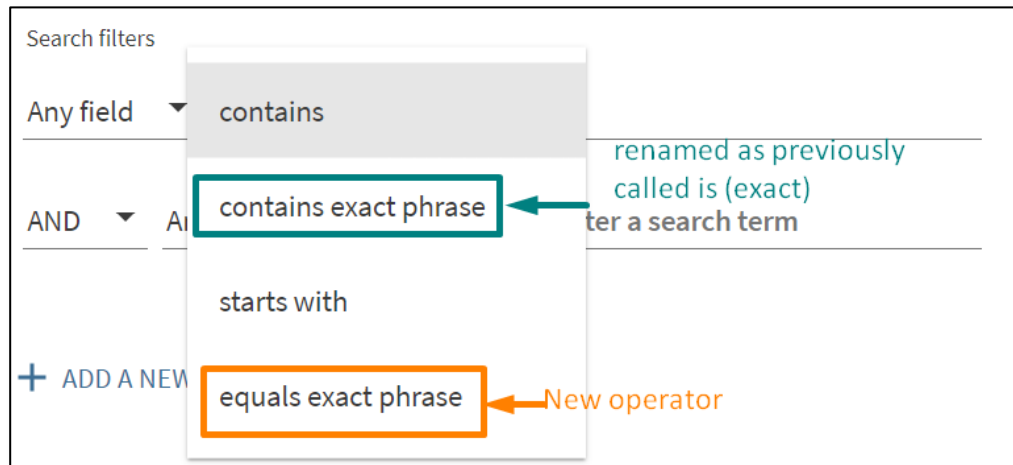
- To completely override the out-of-the-box mappings for system resource types.
- To custom the order of the mapping

# Advanced Search - New operator “Equals exact phrase”

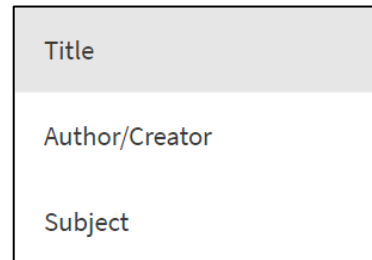
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New operator “equals exact phrase” allow users to view results in which the data in the specified Author, Title, or Subject field contains only the exact phrase



Supported fields for new Operator in both CDI and Primo VE are:



\*Coming from NERS #6693 - [Ideas Exchange](#)

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Demo

# Advanced Search - New operator “Equals exact phrase”

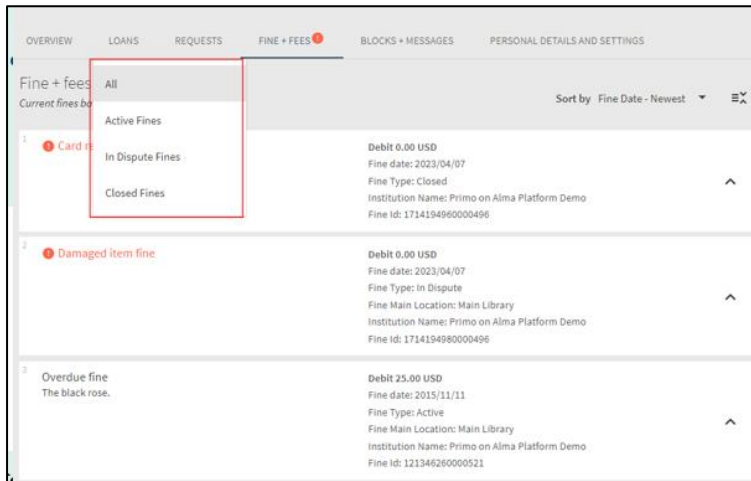
Searching the term	Contains exact phrase	Equals exact phrase	Comments
Kern, Stephen or Kern Stephen	Include also results with Kern, Stephen (1943-....) or Kern, Stephen B.	Kern, Stephen	
Stephen Kern	Same results as searching Kern Stephen	Show less results only ones indexed as <search> <creatorcontrib>STEPHEN KERN</creatorcontrib>	Changing the order will retrieve results that are indexed in the same order
Criminal law	Include also Criminal law -- History Criminal law -- Soviet Union -- History Criminal law -- France -- History	Only Criminal law	
Sasha's Tail: Lessons from a Life with Cats	Include also Agriculture -- Sasha's Tail: Lessons from a Life with Cats	Only “Sasha's Tail: Lessons from a Life with Cats”	
Journal of neurophysiology	Include also Looking Into the Future - The Journal of Neurophysiology	Only Journal of neurophysiology	
Pet	The pet , Journal of exotic pet medicine	Pet , The Pet	special characters and definite or indefinite articles (e.g., “the”)

# Advanced Search - New operator “Equals exact phrase”

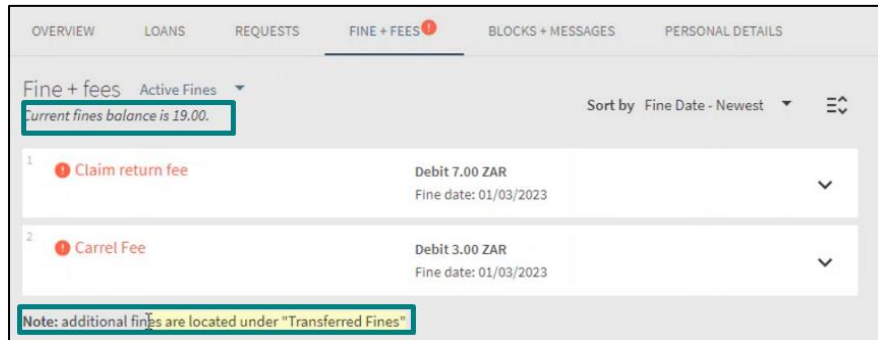
- Search Query attempts to search only the user’s terms
  - No search engine expansion is applied on search query (inflection, synonyms , melingo – Hebrew search plug-in)
  - Matched is done on specific search fields – note that display fields may be different from search field
- Option to use the “Equals exact phrase” also for Hypertext linking
  - Subject: Normalization rules were changed for all 6XX subject display fields (and 880-6XX fields) to support better format of \$Q (search query) used when clicking on subject hypertext linking
    - Changes will be applied after Repository semi-annual indexing is completed - July

# My Library Card – Option to Filter by Fine Status

Allow users to view all fines and filter fines by status



The filter shows only status that are relevant to the user's current fines and fees



If defined, current balance can include both active and transferred fines and fees, message will be added to note the users on additional fees.

\*Coming from - [Ideas Exchange](#)

# Improved Usability of Resource Recommender Management

Resource Configuration: Open Access Publication

Resource display name: Open Access Publisher

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Import Add Resource

Display translations: English (Default Language)

Active	Key	Name	Description	Tags	Display Always
<input type="checkbox"/>	custom2.0019-4964	Journal of the Indian Institute of Science	Springer Nature transformative agreement (APC)	journal of the indian institute of science;0019-4964;springer;	<input type="checkbox"/>
<input type="checkbox"/>	custom2.0019-5308	The Indian Journal of Labour Economics	Springer Nature transformative agreement (APC)	the indian journal of labour economics;0019-5308;springer;	<input type="checkbox"/>

1 2 3 ... 175 >

1 of 175 Go

Adding pagination in Resource Recommender Admin pages to support easy navigation when mass resources are defined

Import

This upload is being executed on the background, you will get notification once this is done

Monitor Jobs

Scheduled SP Scheduled Running History

1 - 68 of 68

Job Category: All Status: All Submit Date Range: 04/15/2023 - 04/16/2023

Name	Process ID	Job Category	Operator	Submit Date	Start Date	End Date	Status	Records processed	Records with exceptions
Resource Recommender Import	124578898100...	Discovery	ex_libris	04/15/2023 20:23:26 IDT	04/16/2023 20:23:32 IDT	04/16/2023 20:24:07 IDT	Completed Successfully	0	0

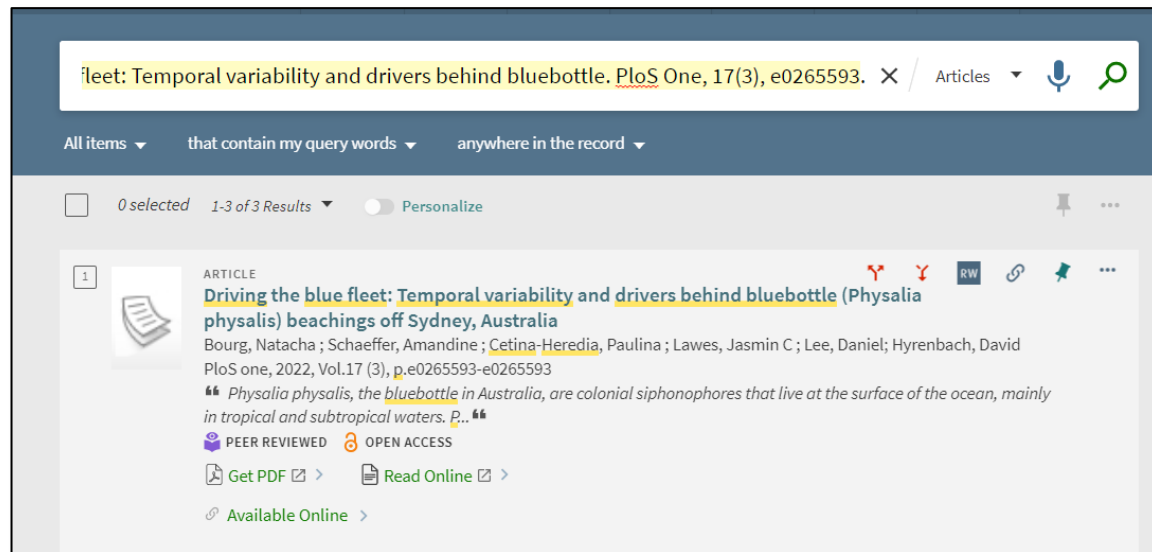
Support import from xls in the background in case of loading mass of resources. You can monitor the job in

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# CDI – AI Assisted Citation Parsing

Enhanced citation query parsing based on opensource AI tool

Use of GROBID to identify and parse citation for more accurate results to account for typical style differences such as shortened names, pagination etc.



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# Additional Notable Items

- Accessibility ongoing fixes following customer cases and input from external audit
  - New VPAT is available on CKC
  - 2023 accessibility roadmap will be published soon based on external audit
- Primo VE – Analytics API ( Idea )
  - This enhancement allows you to use an API to return a Primo VE Analytics report in XML
  - <https://developers.exlibrisgroup.com/primo/apis/analytics/>



- Adding more content providers is 2023 priority
- Now with 34 supporting providers
- Over 10,500 collections with 1.55 billion records
- Linking success rates – 99%

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/030Primo\\_VE\\_User\\_Interface/Quicklinks\\_Provider\\_List](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/030Primo_VE_User_Interface/Quicklinks_Provider_List)

Provider	Content	Type of Collection (PDR/HTML)
ACM Digital Library	All	PDR
Elsevier	All	HTML
ProQuest	All Content and using Adobe on the ProQuest Platform: <a href="https://www.proquest.com">https://www.proquest.com</a>	HTML (In most cases this is the PDR file, but it is included in the HTML)
SAGE Publications	Journals under <a href="https://journals.sagepub.com">https://journals.sagepub.com</a>	PDR, HTML
Springer Nature	Journals and Books under <a href="https://link.springer.com">https://link.springer.com</a>	PDR, HTML
Wiley-Blackwell	Journals and Books under <a href="https://onlinelibrary.wiley.com">https://onlinelibrary.wiley.com</a>	PDR, HTML
Boone	Journals under <a href="https://boone.org">https://boone.org</a>	PDR
IQD Publishing	All	PDR
National Library of Medicine	Content which is part of PubMed Central collection under <a href="https://www.ncbi.nlm.nih.gov/pmc/">https://www.ncbi.nlm.nih.gov/pmc/</a>	PDR, HTML
New England Journal of Medicine	Content under <a href="https://www.nejm.org">https://www.nejm.org</a>	PDR, HTML
Emerald	Journals and Books under <a href="https://www.emerald.com/">https://www.emerald.com/</a>	PDR, HTML
Crucio Reference	Content under <a href="https://search.crucio.com/">https://search.crucio.com/</a>	PDR, HTML
Triana	All Journals content including conference proceedings under <a href="https://www.triana.com">https://www.triana.com</a>	PDR, HTML
IEEE	Content under <a href="https://ieeexplore.ieee.org">https://ieeexplore.ieee.org</a>	HTML
Wiley-Blackwell, Inc.	Journals under <a href="https://www.wiley.com/">https://www.wiley.com/</a>	PDR, HTML
SPR	Content under <a href="https://www.spr.com/">https://www.spr.com/</a>	PDR, HTML
University of Chicago Press		PDR, HTML
Royal Society Publications	Content under <a href="https://royalsocietypublishing.org">https://royalsocietypublishing.org</a>	PDR, HTML
Project MUSE	Journals and Books under <a href="https://muse.jhu.edu/">https://muse.jhu.edu/</a>	Journals (PDR, HTML) Books (HTML)
JSTOR	Journals Content under <a href="https://www.jstor.org/">https://www.jstor.org/</a>	PDR, HTML
American Institute of Aeronautics and Astronautics	Journals, Standards, Proceedings, Books under <a href="https://arc.aiaa.org">https://arc.aiaa.org</a>	Journals, Standards, Proceedings (PDR, HTML) Books (HTML)
Alexander Street	All	HTML
Taylor & Francis	All	PDR, HTML
Emerald Publishers	All	PDR
World Scientific Publishing	Journals	PDR
Cambridge University Press	Journals, Books	HTML
American Chemical Society	Journals, Books	PDR, HTML
高等教育出版社 (Higher Education Press)	Journals	HTML
American Society for Microbiology	Journals	PDR, HTML
INFORMA	All	PDR, HTML
Edinburgh University Press	Journals under <a href="https://www.edupublishing.com/">https://www.edupublishing.com/</a>	PDR, HTML
Hammar	Books	HTML
O'Reilly Media, Inc.	Books	HTML
USPTO	Published applications and issued patents under <a href="https://www.uspto.gov/patents/publications">https://www.uspto.gov/patents/publications</a>	PDR

# Sneak Peek for 2023 Q3

## Primo and Primo VE

Collection Discovery Usage



Introduce New Carousel Widget to  
Embed Library resources in other  
sites

## Primo VE Linked Data – Person Info Card

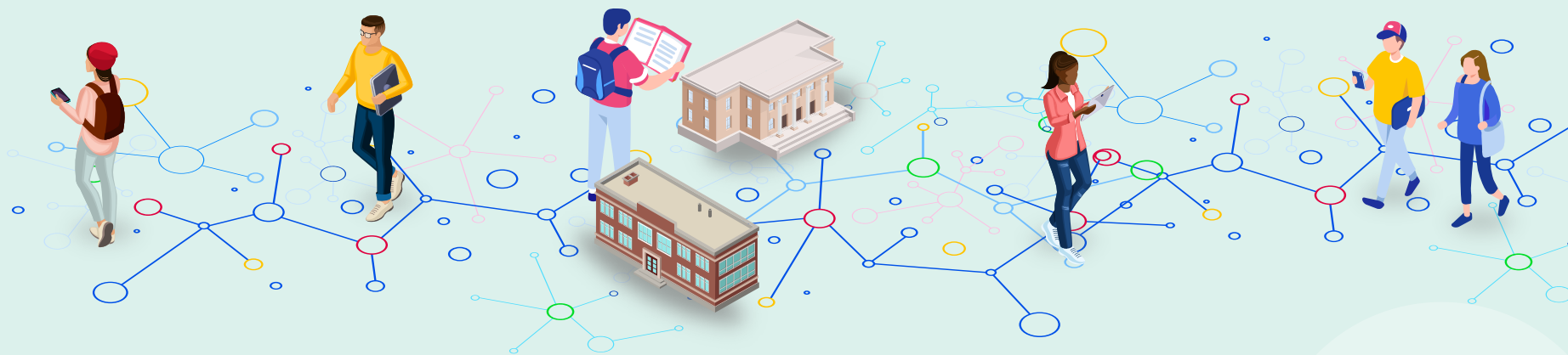
*\*was delayed from May*

Highlight the Preferred Record  
on Top of the List of Versions

Enhancing DEDUP & FRBR  
Definitions to include Keys based  
on local fields.

Enrich Resource Recommender  
Matching

Display Item Policy



# Community Engagement

# Webinar next week – Thursday April 27, 2023

  innovative  
Part of Clarivate

Ex Libris & Innovative present:

  
Webinar

**Diversity and inclusion by design –  
How technology can ensure a better world**



**Orly Lobel**  
Award-Winning Author



**April 27, 2023**  
11:00 am EDT (New York)  
4:00 pm GMT+1 (London)



SCAN ME

Link in the chat

# Upcoming User Group Events



# Thank you!

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