

What's New for Primo/Primo VE

2023 Q3 - Primo Product Team



Highlights



- Primo Analytics - Collection Discovery Usage
- Display Documents Attributes for CDI Records
- Highlight Selected Record in FRBR Version List
- Support New Resource Types in CDI
- Option to Display the Item Policy in the Get It
- Additional Notable Items & Updates

Primo - What's New

Primo and Primo VE

Primo Analytics - Collection Discovery Usage



Display Documents Attributes for CDI Records

Highlight Selected Record in FRBR Version List

Support New Resource Types in CDI

Ongoing Accessibility Improvements

Primo VE

Add Configuration to display the Item Policy in the Get It.

Enhanced Search Capability for Resource Recommender

Add Library Notices to My Library Card – Personal Details

Secondary Resource Type Enhancements

Improve Performance of Browse Search

Allow Authentication for Customized List of Institutions

Primo & Primo VE Release Schedule

- Primo August 2023

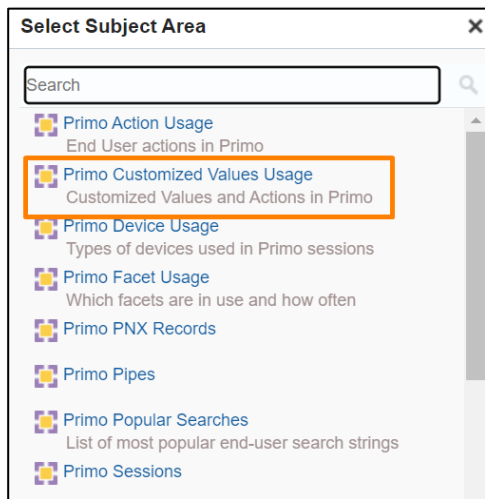
Quarterly Release	MT Sandbox	Total Care (TC)	MT Production	Local
August 2023	July 23, 2023	July 30, 2023	August 6, 2023	August 20, 2023

- Primo VE Release Schedule

Monthly Release	Sandbox Release	Production Release	Release Update (Alma only)	Release Type	Notes
June 2023	May 21, 2023	June 4, 2023	-	Resolved Issues Analytics	
July 2023	June 18, 2023	July 2, 2023	-	Resolved Issues Analytics	Repository semi annual indexing is ready
August 2023	July 23, 2023	August 6, 2023	August 13, 2023	Feature Release Resolved Issues	<ul style="list-style-type: none">Primo VE semi-annual indexing is readyPremium sandbox refresh occurs with the Release Update

Primo Analytics - Collection Discovery Usage

Introduce a new Subject Area: Customized Values Usage in which you can track the Collection Discovery's usage per collection



Customized Value	Actions	Action
Naismith Memorial Basketball Hall of Fame	203	Display a collection
Harry Potter	189	Search in a collection or sub collection
Empty collection	150	Display a collection
many items	144	Display a collection
Harry Potter	129	Display a collection
Characters	128	Display a collection
Modern Art - Gilad 9 (changed 2ND TIME!)	109	Display a collection
only sub collections, no items	93	Display a collection
Digitised Paintings	75	Display a collection
Salvador Dalí	73	Display a collection
Surrealism	73	Display a collection
Most Recent Recordings	59	Display a collection
only sub collections, no items	57	Search in a collection or sub collection
Categories	56	Display a collection
Women of the Hall of Fame	56	Display a collection
sub 1	56	Display a collection
Digitised Paintings - Materials	55	Display a collection
only items, no sub collections	55	Display a collection
Modern Art - Gilad 9 (changed 2ND TIME!)	54	Link to Collection path from full display
Naismith Memorial Basketball Hall of Fame	54	Link to Collection path from full display

You can see per collection name the number of actions applied on it

*Coming from NERS #7186 - [Ideas Exchange](#)

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Primo Analytics – Customized Values Usage

You can also track the usage of the new Resource Types Filter bar per resource type name in addition to usage per location

Select Subject Area

Search

- Primo Action Usage
End User actions in Primo
- Primo Customized Values Usage**
Customized Values and Actions in Primo
- Primo Device Usage
Types of devices used in Primo sessions
- Primo Facet Usage
Which facets are in use and how often
- Primo PNX Records
- Primo Pipes
- Primo Popular Searches
List of most popular end-user search strings
- Primo Sessions

Search anything

All Books Articles Journals Images Video/Film Dissertations

Actions	Action
1,280	Clicking on a resource type filter bar 2
1,000	Clicking on a resource type filter bar 3
676	Clicking on a resource type filter bar 1
629	Clicking on a resource type filter bar 5
432	Clicking on a resource type filter bar 4
209	Clicking on a resource type filter bar 6
100	Clicking on a resource type filter bar 9
91	Clicking on a resource type filter bar 7
83	Clicking on a resource type filter bar 8
78	Clicking on a resource type filter bar 10
22	Clicking on a resource type filter bar 11

Usage per resource type location

Actions	Customized value
1280	Books
1000	Articles
676	All
629	Images
432	Journals
209	Video

Usage per resource type name

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Display Documents Attributes for CDI Records

Indicate the users with additional attributes associated to CDI records such as Primary Source, Preprint or Retracted publication ..

Regular Document Attributes	Primary Source
	Review Article
	Preprint
Warning Document Attributes	Retracted publication
	Retraction notice
Additional Warning attributes will be gradually available	Withdrawn Publication
	Withdrawal notice
	Publication with Expression of Concern



Indication on Review Article :
Article that provides analysis, review or interpretation of a body of primary research on a specific topic



Indication on
Retracted Publication:
A retraction is the action by which a published paper in an academic journal is removed from the journal



Indication on
Retraction notice
A retraction notice typically accompanies the retraction of a scientific publication. It is a short article written by the editors or authors explaining the reason for a retraction.

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Demo

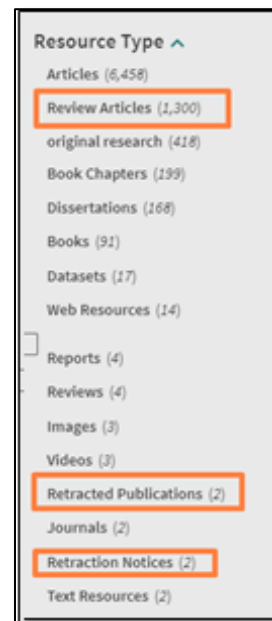
Display Documents Attributes for CDI Records

Allow users to also filter by these attributes as part of the Resource Types Facet

- This functionality is disabled by default
- Infrastructure is ready to show more attributes
 - Currently these attributes will be available
 - Review Article
 - Retracted publication
 - Retraction notice
 - Primary Source
 - Preprint
 - Gradual rollout – working on adding more attributes and more sources to load the information from

Note: Enhancement will be available with CDI – August release

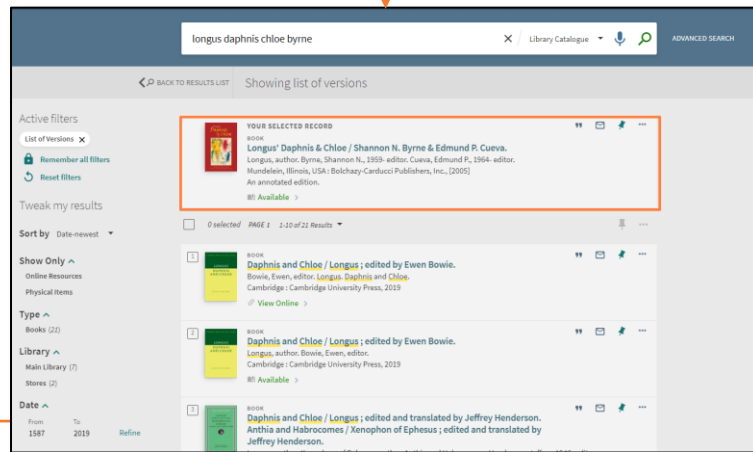
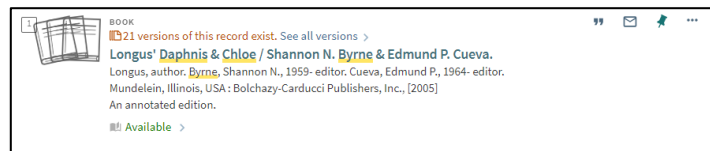
[Demo](#)



Highlight Selected Record in FRBR Version List

Upon viewing list of FRBR versions, display above the list the selected record to help users quickly understand the context and see the record they came from

- This functionality is disabled by default
- It is only relevant when using the FRBR Preferred mode
- The selected record appears above list of records even when navigating to next pages
- The selected record appears above the list and in addition as a record within the list



*Coming from [Ideas Exchange](#)

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[Demo](#)

Support New Resource Types in CDI

New Resource Types are now available in CDI for display and filter by:
Magazine, Magazine Article and Questionnaire

Magazine

A popular interest periodical usually containing articles on a variety of topics that are written by various authors in a non-scholarly style

Magazine Article

A self-contained nonfiction prose composition on a fairly narrow topic or subject, which is written by one or more authors and published under a separate title in a magazine.

Questionnaire

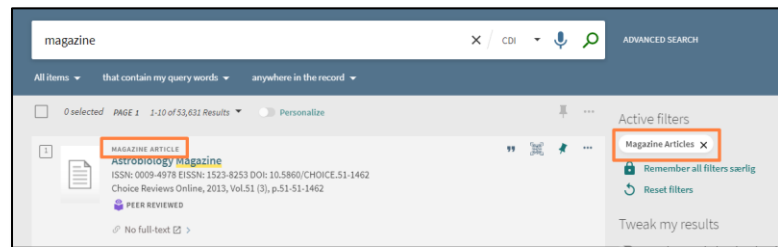
A set of printed or written questions with a choice of answers, which is devised for the purpose of a survey or statistical study. It is used for records from the Henrietta Szold collection.

Note: Enhancement will be available with CDI – August release

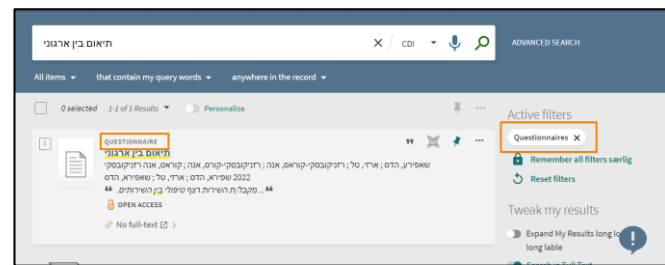
*Coming from NERS #8292 and [Ideas Exchange](#)

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Allow users to filter by resource type Magazine Articles



Allow users to filter by resource type Questionnaire

Option to Display the Item Policy in the Get It.

Library can configure the Item Policy field to be displayed in the Get It brief or full item.

The screenshot shows the 'Physical Items' list with one item: 'What to eat / Marion Nestle'. The item details include the barcode 14290256, library name 'Biology Library', and item status 'Item in place'. The 'Due back' field is highlighted with an orange box, showing 'Item Policy: Four Day Loan'. Below this, a configuration window titled 'Fields for brief item display - Row 4' is shown. It has a table with columns 'Code' and 'Item Field'. The first row has code '1' and the field 'Item Policy'. The 'Item Policy' field is highlighted with an orange box, and a dropdown menu is open showing 'Item Policy' as the selected option.

Code	Item Field
1	Item Policy

GetIt Configuration > Items Display Configuration

The screenshot shows the 'Get It' page for the item 'What to eat / Marion Nestle'. The item is 'Available' in the 'Biology Library'. The 'Item status Queue' is 'Item in place'. The 'Item policy' is 'Four Day Loan', which is highlighted with an orange box. Other details include 'Material Type: Book', 'Location: Biology Library Biology Stacks', 'Barcode: 14290256', and 'Call number: RA784 .N46 2006'.

Exposing the Item Policy to patrons and staff to better explain borrowing policy of a particular item if such defined.

*Coming from - [Ideas Exchange](#)

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[Demo](#)

Enhanced Search Capability for Resource Recommender

This enhancement allows suggested resources to be returned through the enrichment of searchable tags by adding synonyms and inflections, removing stop words from tags and searches, accepting non-ordered search words

Type of Enrichment	Search Query	Searchable Tag
Synonyms	FDA	food and drug administration
Inflections	history	histories
Remove stop words	the history of the united states	history united states
Non-ordered search words	harry potter	potter harry

Note:

- Inflections and Stops words are currently supported for English
- Feature will be fully available with the completion of indexing of all existing searchable tags – planned for August

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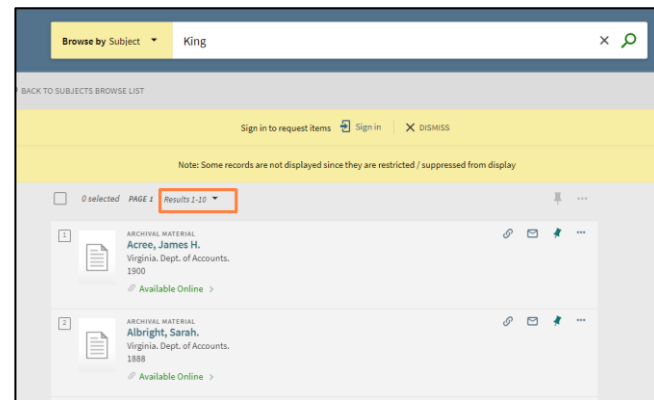
[Demo](#)

Primo VE - Improving Browse Performance

Improving the workflow of selecting an entry with many results in the Browse Search List. Reducing the response time by fetching records in bulks.

- Impact of this optimization
 - Not showing total of records, only indication that next page is available.
 - Disabling DEDUP and FRBR in Browse Search results list
- This functionality is enabled by default, to disable it open a case to support

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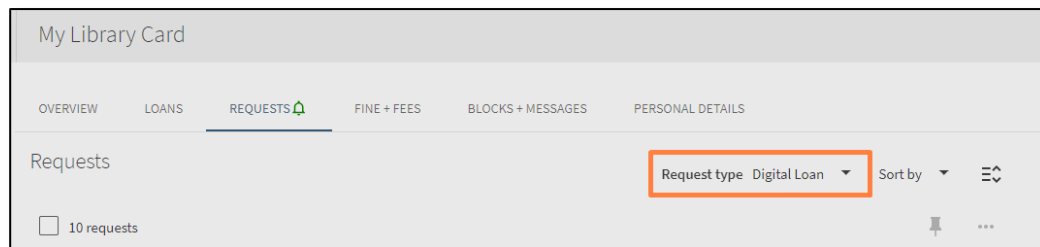


Demo

ExLibris
Part of **Clarivate**

Requests for Long-Term Digital Loans

Allow Patrons to request digital copies of physical materials from the View Online section and manage them from the My Library Card > Requests tab.



Learn more on
**Long Term Digital Fulfillment
in Alma**
In this [video](#)

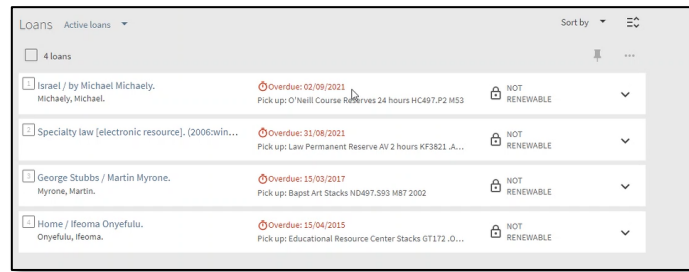
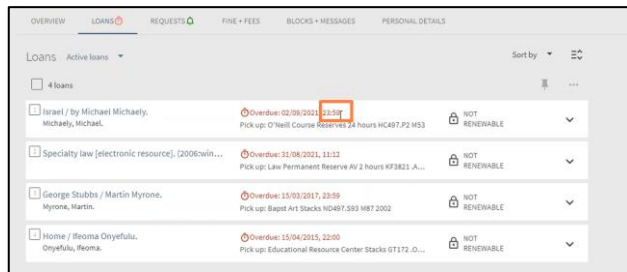
Ancient Egypt	DIGITAL LOAN. Currently In Use. Return due date: 26/05/2023	VIEW	▼
Dolphins	DIGITAL LOAN. Currently In Use. Return due date: 26/05/2023	VIEW	▼

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Note: To enable open a case

Additional Enhancement

- Integrating Melingo – Hebrew search plug-in into CDI
 - Coming in CDI August release: Improvement to Hebrew searches in CDI using Melingo Third-party search plugin
 - To support this – Hebrew data migrated to dedicated CDI index servers
 - This can serve Customers cross world that are using Hebrew collections in CDI
- Option to hide Due date in My Library Card -> Loans section and in the Get It
 - For Primo BO – Hiding due date is only relevant in the Loans section
 - Coming from [Idea](#)



Additional Notable Items

- Newspaper Search – Add configuration to determine the default sort (differently from the brief results default sort)
 - Available for Primo BO in August release
 - In Primo VE will be available with September release
- Primo VE - Add Library Notices section to My Library Card -> Personal Details
 - Enable users to opt in/out from receiving library notifications

<input type="checkbox"/>	Activity Report	<input checked="" type="checkbox"/>	Courtesy letter
<input checked="" type="checkbox"/>	Overdue Notice	<input type="checkbox"/>	Loan Status letter
<input type="checkbox"/>	Recall letter	<input checked="" type="checkbox"/>	Recall Cancellation letter

Additional Notable Items

- Linked Data – Author Info Card
 - Delayed for 2024 roadmap – different approach should be examined
 - Performance and Scalability testing shows that external service didn't stand in KPI of expected usage
- Resource Type filters in Primo VE
 - Following discussion raised in the list - aligning the numbers of results appear when clicking on resource types filter bar and counter of Facet resource type
 - planned for November
 - support 10 resource types per scope

Sneak Peek for 2023 Q4

Primo and Primo VE

Improve Search Experience when No Results Found



Introduce New Carousel Widget to Embed Library resources in other sites

Add configuration to use Filtered/Expand search for Citation Trail results

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

Define additional availability statuses when using Discovery Import Profile

Support UNIMARC in Discovery Import Profile

Thank you!

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