Primo November 2023 Release Notes

February 2024 Sneak Preview

- Using the new CDI Subject and Keyword fields.

Features

Primo Analytics - Track Provider for Quicklink Actions

November 2023

With the addition of the following actions to the Customized Values Usage subject area, you can now track the selection of HTML and PDF Quicklinks based on the provider:

Group	Subgroup	Action	Description
Document	Link	Link to HTML fulltext using CDI Quicklink	The user selected a CDI Quicklink to the HTML version of the full text from a specific provider.
		Link to PDF fulltext using CDI Quicklink	The user selected a CDI Quicklink to the PDF version of the full text from a specific provider.

For more information, see Primo Customized Values Usage.

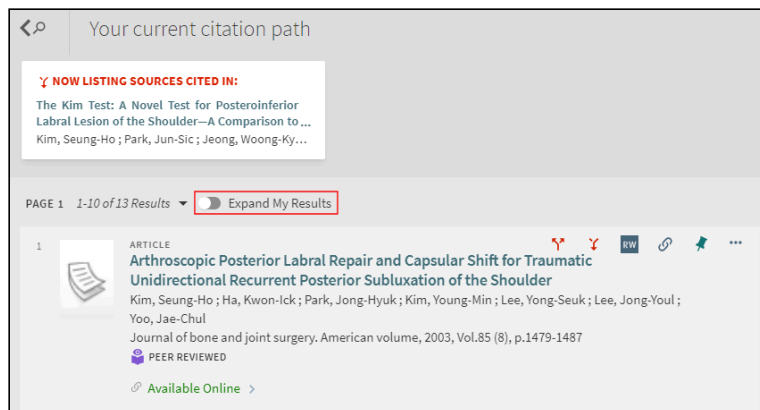## Preserve the Formatting of Citations Copied from Primo (NERS #8157)

November 2023

Previously, the Citation export action copied citations to the clipboard in plain text format, but the citation's formatting (such as italics) was lost when copying it to a document (such as Word). The Citation export action now saves the citation to the clipboard in Rich Text Format (RTF) and retains the citation's formatting when copied to Word documents. When using a text editor such as Notepad, the text is copied without formatting.

Enable Users to Filter or Expand Citation Trail Results

November 2023

Previously, citation trail results were filtered only by availability, which meant that citations were not included if the citations belonged to CDI collections that did not have access to full text. With this enhancement, users can enable/disable the expansion of citation trail results. In addition, you can set the default setting (filter or expand results) for your views. The default setting is to filter out CDI collections that do not have access to full text.

Filter by Availability in Citation Trail Results

Note

This functionality works independently from the **Expand My Results** option on the main search page.

Analytics - Expand Citation Trail Results

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

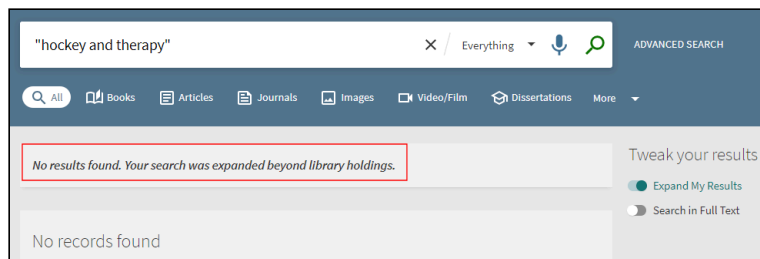| Group	Subgroup	Action	Description
Document	Citation Trail	Turn on Expand My Results	The user selected the toggle to expand citation trail results to include collections that do not have access to full text.
		Turn off Expand My Results	The user selected the toggle to filter the citation trail results by availability.

Configuration Options

The ability to filter or expand results is displayed without configuration, but you can configure whether to filter or expand citation trail results by default by setting the new **citation_trail_filter_results** parameter to **true** (default) or **false** in the View Properties mapping table (**Primo Home > General > Mapping Tables**). When set to **false**, the results are expanded to include all citations regardless of availability. For more information, see Configuring Citation Trails.

Improve Search Experience for No Results Found (NERS #6729)

November 2023

You now have the ability to set whether searches that return no results will automatically expand the search to include CDI collections that have not been activated in Alma. In addition, users will be notified when their searches have been expanded automatically. When enabled and searches are not already expanded for CDI, the following message appears if a search in CDI first returns no results without expansion:

Expansion Used - No Results Found

Configuration Options

This functionality is disabled by default. Refer to the following table for information on how to enable this functionality and configure additional settings.

Element	Description
Institution Properties mapping table (**Primo Home > General > Mapping Tables**)	To enable this functionality, set the **expand_my_results_when_no_results** parameter to **true**. For additional information, see Configuring Institution Properties in Primo.
Results Tile code table (**Primo Home > General > Mapping Tables**)	The following code was added to support the customization and translation of the messages display label: default.nui.results.search.was.expanded – **No results found. Your search was expanded beyond library holdings.**

Additional Enhancements

- **November 2023**
  Support Delivery to Additional Personal Delivery Locations from Hold Request Form – In addition to home and work locations, users can now select additional personal locations on the Request Form if they have been configured in the user's account. For more information, see Configuring Additional Personal Delivery Locations.

Select Personal Address Location from Request Form

Resolved Issues

- **November 2023 SF: 6656725**
  The alignment direction of the Authentication note was not displayed correctly for Hebrew. This has been fixed.

- **November 2023 SF: 6471080**
  The alignment direction of the fine/fee numbers on the My Account > Fines and Fees page displayed incorrectly for the Hebrew interface. This has been fixed.

- **November 2023 SF: 6467119**
  English titles in My Account displayed from their end instead of their beginning in the Hebrew interface. This has been fixed.

- **November 2023 SF: 6467091**
  When a viewing a record's PNX with the Hebrew interface, the PNX fields were aligned on the right instead of the left. This has been fixed.

- **November 2023 SF: 6460144**
  In Resource Recommender suggestions, space was missing between resources when using the Hebrew interface. This has been fixed.

- **November 2023 SF: 6460134, 6752730**
  The My Favorites pin in Collection Discovery was aligned to the left instead of the right when using the Hebrew interface. This has been fixed.

- **November 2023 SF: 06589144, 06718554**
  The following actions were not being recorded in Analytics: **Reference Entry - Full text** and **Reference Entry - View More**. This has been fixed.

- **November 2023 SF: 6873528**
  While trying to publish to Google, some of our sitemap links were not able to be indexed. This has been fixed.

- **November 2023 SF: 6867612, 6874967**

When using PDS authentication, logins from outside of campus did not work for some cases. This can be fixed by adding the new **allow_multiple_institutions_login** parameter and setting to **true** in the Institution Properties mapping table.

- **November 2023** SF: 6837310
  In some cases, records in the database were not indexed. This has been fixed.

- **November 2023** SF: 6637167, 6768340
  The screen reader read text as English instead of the user's UI language. This has been fixed.

- **November 2023** SF: 6546820, 5302249, 5318707, 5327039, 6041754
  When using the Send to Email action from My Favorites, some of the specified records were missing. This has been fixed.

- **November 2023** SF: 5303541
  After labels were added to records in My Favorites, they were not announced by the screen reader, and keyboard navigation could not be used to edit the labels. This has been fixed.

- **November 2023** SF: 5320973, 5328692, 6438745, 6561167, 6574797, 6599779, 6670524, 6679771, 6707296, 6844289
  Local facets were not collected for Analytics. This has been fixed.