

## Primo VE November 2023 Release Notes

### February Sneak Preview

- NERS #8141 – Add configuration to set the display level in the Get IT section to Item level or Location level.
- Add option to exclude field 561 with indicator 0 (marked as private) from being searchable.
- NERS #8134 – Allow HTML coding in labels, public notes and collection description.
- Using the new CDI Subject and Keyword fields.
- New Primo Showcase Tool - A visual carousel of items tailored to the library's specifications, helping libraries promote their content in other sites.

## Features

### 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 on the Citation Results page, but you can configure whether to filter or expand citation trail results by default by selecting (default) or clearing the new **Filter by availability** checkbox, which is accessed from the Full Record Services tab on the View Configuration page ([Configuration > Discovery > Display Configuration > Configure Views](#)). When the checkbox is cleared, the results are expanded to include all citations regardless of availability. For more information, see [Configuring the Citations Service](#).

### Edit Citation Service

☒ Citation Trail

☒ Filter by Availability

☒ Times Cited

Done

Filter by Availability Option - Edit Citation Service Dialog Box

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## 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.

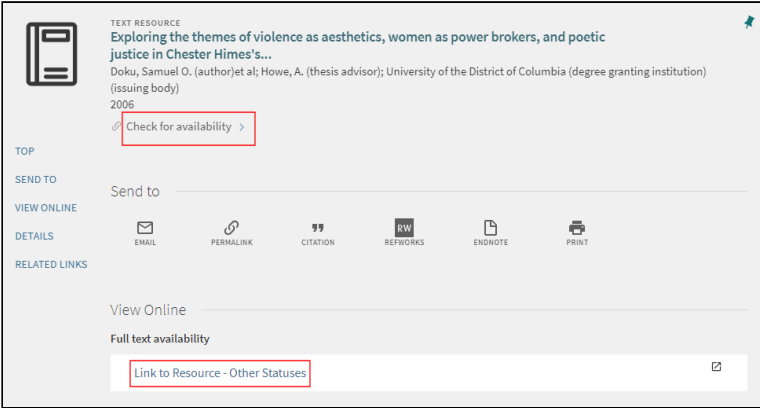
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## Support Restricted Availability Statuses for External Records

### November 2023

Previously, records loaded into Primo VE from external data sources were considered unrestricted and given the **Available online** availability status and the same label for links to full text in the View Online and Links sections of the record's full display. With this enhancement, you can now display a different availability status for records with restricted or no access to

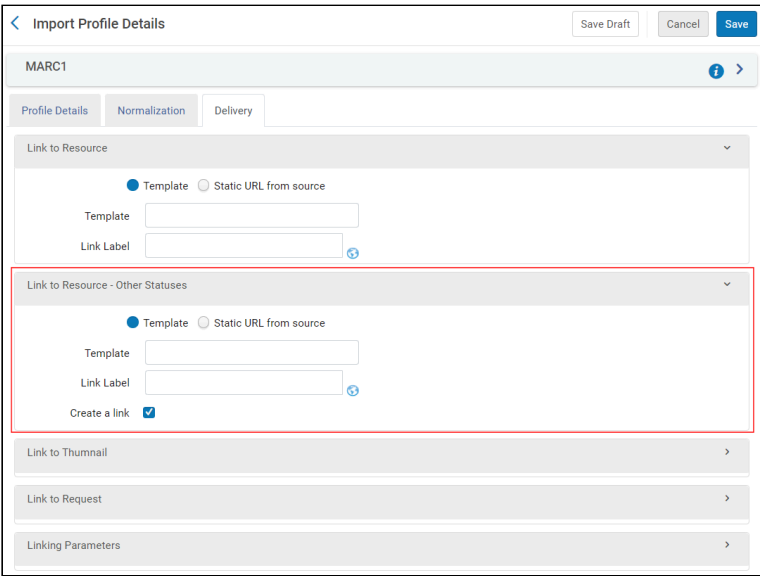
full text. In addition, you have the option to omit the links in the View Online and Links sections of the record's full display if full text is unavailable for the record.



Restricted Access to Full Text in Full Display

# Configuration Options

The Link to Resource - Other Statuses section has been added as a delivery option in discovery import profiles ([Configuration > Discovery > Loading External Data Sources > Discovery Import Profiles](#)) to enable restricted availability statuses and links to full text. If both restricted (Link to Resource - Other Statuses) and unrestricted (Link to Resource) sections are enabled, only one option is used based on precedence and conditions. For detailed information, see [Configuring Import Profiles for Primo VE](#).



Discovery Import Profile - Add Other Statuses

In addition, the following codes have been added to the Calculated Availability Text Labels code table to provide labels for availability statuses and links for records with restricted or no access to full text:

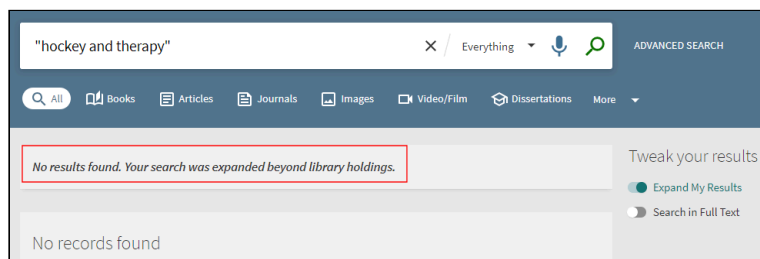
Code	Description
delivery.code.ext_restrictedNoLink	This code displays the following availability status label when there is no access to full text:

Code	Description
	<b>Not available online</b>
delivery.code.ext_restrictedWithLink	This code displays the following availability status label when there is restricted access to full text: <b>Check for availability</b>
delivery.code.ext_restrictedNoLink_and_physical	This code displays the following availability status label when there is no access to full text, but there may be access to physical inventory: <b>Not available online + Check holdings</b>
delivery.code.ext_restrictedWithLink_and_physical	This code displays the following availability status label when there is restricted access to full text, but there may be access to physical inventory: <b>Check for availability + Check holdings</b>
delivery.code.ext_restrictedNoLabel	This code displays the following label for full text links if no label is configured for restricted resources: <b>Link to external resource</b>

## 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 to configure additional settings.

Element	Description
Discovery Customer Settings page ( <a href="#">Configuration &gt; Discovery &gt; Other &gt; Customer Settings</a> )	To enable this functionality, set the <b>expand_my_results_when_no_results</b> parameter to <b>true</b> .  For additional information, see <a href="#">Discovery Customer Settings</a> .
Results Tile Labels code table ( <a href="#">Configuration &gt; Discovery &gt; Display Configuration &gt; Labels</a> )	The following code was added to support the customization and translation of the messages display label:  <b>nui.results.search.was.expanded – No results found. Your search was expanded beyond library holdings.</b>

## Loading Records from External Sources (UNIMARC)

### November 2023

You can now import UNIMARC records from external sources into Primo VE for discovery in your local catalog. With the use of existing UNIMARC normalization rules, the records are mapped and normalized into Primo VE for discovery.

To support this functionality, the following changes were made to the Primo VE configuration pages:

- Discovery Import Profile page ([Configuration > Discovery > Loading External Data Sources > Discovery Import Profiles](#)):

The screenshot shows the 'Import Profile Details' page with a progress bar at the top (1, 2, 3, 4) and buttons for 'Save Draft', 'Cancel', and 'Next'. The 'Profile Details' section includes fields for 'Profile name', 'Profile description', 'Data Source Code', 'Data Source Label', 'Originating system' (set to 'Other'), 'Import Protocol' (set to 'Upload File/s'), 'Physical source format' (set to 'XML'), 'Source format' (set to 'UNIMARC Bibliographic'), and 'Status' (set to 'Active'). The 'File name patterns' field is empty. The 'Target format' is also set to 'UNIMARC Bibliographic'.

## Resource Recommender - Enhanced Search Capability

### November 2023

Resource Recommender now supports the following enrichments so that the search query does not have to exactly match the searchable tag to display the matching recommendations:

Type of Enrichment	Search Query	Searchable Tag
Synonyms	FDA	food and drug administration
Inflections (English only)	history	histories

Type of Enrichment	Search Query	Searchable Tag
Stop words (English only) are ignored in the search query and searchable tag: <b>a, an, and, are, as, at, be, but, by, if, in, into, is, it, for, of, on, or, no, not, such, that, the, their, then, there, these, they, this, to, was, will, with.</b>	harry potter stone	harry potter and the philosopher's stone  <b>Note</b> By default, at least 75 percent of the search terms (not including stop words) must be included in the search query to return a recommendation. In this example, three out of four words match the tag.
Words ordered differently from searchable tag	harry potter	potter harry

### Note

Upon updating or adding new resource recommendations, tags are indexed immediately like other metadata changes to records.

## Configuration Options

This functionality is enabled by default. If you do not want to change the default setting of the minimum number of matching search terms, modify the value of the **resource\_recommender\_tags\_min\_coverage** parameter on the Discovery Customer Settings page (**Configuration > Discovery > Other > Customer Settings**). For more information, see [Discovery Customer Settings](#).

## Create Local Keys for FRBR/Dedup Matching

### November 2023

To update how records are matched for FRBR and Dedup, you can now create a maximum of 20 local keys (L1 – L20), which can be used to create or update complete keys used for matching. To support the creation of local keys, the Create Local Key tab has been added to the Dedup/FRBR Complete Key Combination page (**Configuration > Discovery > Other > Dedup/FRBR Complete Key Combination**). For more details, see [Creating a Local Key](#).

Enabled	Local Key	Format	Field	Description
<input checked="" type="checkbox"/>	L1	UNIMARC Bibliographic	300	-

### Dedup/FRBR Complete Key Combination Page - Create Local Key Tab

## Enable Setting of Personal Delivery Locations from Hold Request Form

### November 2023

When this functionality is enabled, users can select a personal delivery location (such as home or work) and either add or

modify its details on the Request Form. After placing the request, the location information is updated in the user's account. In addition to the home and work locations, additional personal delivery locations can be configured and selected from the Request Form.

In the following example, the user selected **Work Address**, but it had not been added to the user's account previously.

Request Type

☒ Request ☐ Booking

Pickup Location

★ Work Address ▼

Address Line 1

Address Line 2

Address Line 3

Address Line 4

City

State/Province

Postal Code

Add Address for User's Work Location from Request Form

Configuration Options

This functionality is disabled by default. Refer to the following table for information on how to enable this feature and to set other configuration options. For more details, see [Setting Personal Delivery Locations from Hold Request Form](#).

Element	Description
Hold and Booking Request Form page ( <a href="#">Configuration Menu &gt; Discovery &gt; GetIt Configuration &gt; Hold and Booking Request</a> )	To enable users to add or modify address information for personal delivery location types, display the following fields on the Request Form: <b>addressLine1</b> – <b>addressLine4</b> , <b>city</b> , <b>stateProvince</b> , <b>postalCode</b> .
Request Labels code table ( <a href="#">Configuration &gt;</a>	The following codes enables you to customize and translate the display labels for the

Element	Description
Discovery > Display Configuration > Labels)	<p>address fields on the Request Form:</p> <ul style="list-style-type: none"> <li>• almaRequest.addressLine1 – Address Line 1</li> <li>• almaRequest.addressLine2 – Address Line 2</li> <li>• almaRequest.addressLine3 – Address Line 3</li> <li>• almaRequest.addressLine4 – Address Line 4</li> <li>• almaRequest.city – City</li> <li>• almaRequest.stateProvince – State/Province</li> <li>• almaRequest.postalCode – Postal Code</li> </ul>
Additional Personal Delivery Address Types (Configuration > Fulfillment > Patron Configurations > Additional Personal Delivery Address Types)	<p>Other than the standard personal delivery location types for work and home addresses, this table enables you to define 10 additional personal delivery location types to which users can add or modify address information (such as their address and city).</p> <p>You can customize and translate the display values for each type by updating the Description and Translation columns for each of the following codes:</p> <ul style="list-style-type: none"> <li>• P_DELIV_ADDRESS_1 – Personal delivery address type 1</li> <li>• P_DELIV_ADDRESS_2 – Personal delivery address type 2</li> <li>• ...</li> <li>• P_DELIV_ADDRESS_10 – Personal delivery address type 10</li> </ul> <p>For more information, see <a href="#">Configuring Additional Personal Delivery Locations</a>.</p>

## 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 [Analytics Subject Areas for Primo VE](#).



## Additional Enhancements

- **November 2023**

**Resource Type Filter Bar Improvement** – Previously, you could activate a maximum of 10 resource types. With this enhancement, you can now activate a maximum of 10 resource types for each search profile slot. If you attempt to add more than 10 for any search profile slot, you will receive the following message:

Only 10 active filter bar resource types are allowed per scope

- **November 2023**

**Normalization Improvements** – Added the words **intro** and **introduction** to the English synonym files: `en_systemSynonyms` and `en_systemSynonymsAnalyzed`.

- **November 2023**

**My Account Improvements** – The message that returns when a user attempts to download/view a digital item too many times from My Account > My Requests can now be customized and translated by updating the following code in the Library Card Labels code table:

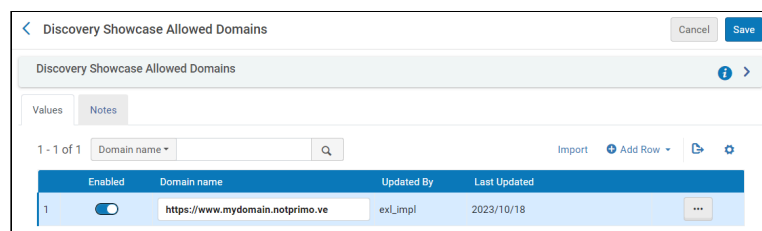
Code	Description
310044	Maximum number of views exceeded

- **November 2023**

**Hebrew Search Improvements** – Previously, when a Melingo expansion was done on a Subject search query, not all subject fields in the index were searched with the expanded words, but only those fields meeting the limitation of 4 X {# of words in query} = index distance. This distance limitation has been cancelled to align with Primo.

- **November 2023**

**Enable the Use of Discovery Showcase Widgets in External Domains** – This enhancement provides external domains permission to embed Discovery Showcase widgets in their website to display specific queries, collections, and new books. In this phase, institutions can define which domains are permitted to embed the widgets. The ability to embed the widgets will be released in February. To support the first phase, the Discovery Showcase Allowed Domains page ([Configuration > Discovery > Other > Discovery Showcase Allowed Domains](#)) has been added. For more details, see [Adding Domains for Discovery Showcase](#).



Discovery Showcase Allowed Domains				Cancel	Save
Discovery Showcase Allowed Domains					
Values Notes					
1 - 1 of 1 Domain name					
Import Add Row					
Enabled	Domain name	Updated By	Last Updated		
1	<input type="checkbox"/>	https://www.mydomain.notprimo.ve	ex_impl	2023/10/18	...

### Discovery Showcase Allowed Domains

#### Note

This enhancement's release has been moved to the December 2023 release.

- **November 2023 (Updated November 30, 2023)**

**CSL Upgrade** – The CSL third-party version has been upgraded to resolve the issue of not being able to generate the first initial of the first author's name when using the APA 7 format. If you were using the workaround CSL style to fix this issue, you can return to the default **apa.csl** style, which is now fixed.

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## Note

Please verify all other citation formats to ensure that there are no issues after the upgrade.

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## Resolved Issues

- **November 2023 SF:** 6539913, 6547637, 5305150, 5328560, 6023299, 6024573, 6024888, 6024934, 6025191, 6025590, 6025970, 6026245, 6026410, 6027097, 6027772, 6028244, 6034378, 6036125, 6037172, 6040996, 6042520, 6043642, 6043948, 6044300, 6047533, 6050244, 6050413, 6055178, 6058265, 6204767, 6216628, 6217661, 6218688, 6219903, 6222299, 6224683, 6233186, 6236443, 6238235, 6239117, 6246167, 6248160, 6249636, 6251793, 6251983, 6252051, 6257086, 6266476, 6272763, 6283540, 6288394, 6291082, 6291557, 6298016, 6315845, 6316659, 6328438, 6330663, 6346323, 6346498, 6346659, 6349485, 6354513, 6366466, 6373874, 6374040, 6374846, 6387372, 6427271, 6428452, 6433800, 6440623, 6445039, 6455915, 6456290, 6458333, 6460093, 6477920, 6478261, 6498244, 6499541, 6500857, 6505234, 6505420, 6513489, 6525670, 6528353, 6556209, 6569732, 6627568, 6628201, 6629074, 6649808, 6664216, 6666014, 6687550, 6750197, 6780610, 6821510, 6822618, 6863667, 6912789, 6925684  
CSL - APA 7th style is not generating the first initial of the first author. This has been fixed. For more information, see [CSL Upgrade](#).
- **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:** 06789711  
The CT Display Constant Labels code table was missing the out-of-the-box label for the following code: `fulldisplay.constants.SUCCEEDS`. This has been fixed.
- **November 2023 SF:** 06662937, 06666640, 06685651, 06697468  
When records were held by multiple IZs, records with call numbers that did not start with the specified term were returned in search results. This has been fixed.
- **November 2023 SF:** 06537957, 06806535

Open Access records from CDI were being proxied in the Links section when proxies were disabled for Open Access records. This has been fixed.

- **November 2023 SF: 06428253**  
The order of full text items on the record's full display page were not in the correct order and should match what displays in Alma. This has been fixed.
- **November 2023 SF: 6806362**  
Primo VE was not allowing users to request items. This has been fixed.
- **November 2023 SF: 6864115, 6877299, 6877696, 6877832, 6877846, 6878522, 6878993, 6879531, 6879700, 6879781, 6881383, 6881506, 6881591, 6908148, 6908696, 6881828, 6882231, 6882390, 6882574, 6882689, 6882769, 6885323, 6885628, 6886883, 6893450, 6895350, 6899333, 6909950, 6917889, 6918113, 6919363, 6920086, 6920211, 6922980**  
The description for the **specificChapterPages** code was not displaying its description. This has been fixed and now uses the **almaResourceSharing.specificChapterPages** code in the Resource Sharing Labels code table.
- **November 2023 SF: 6845852**  
Display CDI document attributes appeared 'on' without the customer activating it in the DB. This has been fixed.
- **November 2023 SF: 6584248**  
Permalink does not work when institution code is masked. This has been fixed.
- **November 2023 SF: 6824281, 6852070, 6862625, 6890497**  
Dedup and FRBR Test Utility consistently throwing errors on FRBR test only. This has been fixed.
- **November 2023 SF: 6794146, 6818765**  
Suppressed records were still displayed after repeated Barcode search. This has been fixed.
- **November 2023 SF: 6824445**  
The Refine My Search section could no be displayed on the right side of the Journal Search page. This has been fixed.
- **November 2023 SF: 6762843, 6805849, 6830952, 6926225**  
Links for Web of Science were returning an error. This has been fixed.
- **November 2023 SF: 6744370**  
The full display of the related record did not show book chapter links in Alma ebook records. This has been fixed.
- **November 2023 SF: 6807986**  
Subject values were not sorted properly in the record's details. This has been fixed.
- **November 2023 SF: 6737664**  
View Online section does not appear for guest users for deduped records in Union View. This has been fixed.
- **November 2023 SF: 6623808, 6730422**  
For blended searches, the Subject facet record numbers did not match the number of records returned when selected. This has been fixed.
- **November 2023 SF: 6779826**  
Fines and fees alert icon appeared for waived fines. This has been fixed.
- **November 2023 SF: 6798949**  
Unable to export records from newspaper search to EndNote. This has been fixed.
- **November 2023 SF: 6717788, 6777674**  
Spanish or French saved search alert email contained English subject label. This has been fixed.
- **November 2023 SF: 6623502, 6847338**  
Some NZ electronic records were excluded/included in the Custom scope that should not include NZ electronic records. This has been fixed.
- **November 2023 SF: 6639905**  
Email address of external user could not be updated and returned the following error: home type is not valid for user of

type Staff. This has been fixed.

- **November 2023 SF: 6596007**  
When using Display Logic Rules to hide digital or electronic services, location and services from institution members were hidden. This has been fixed.
- **November 2023 SF: 6750878, 6751206**  
Search operators in Advanced Search were not readable by JAWS. This has been fixed.
- **November 2023 SF: 6687454**  
The Featured Results Bar was not displaying in Search Profile Slot with Search Webhook. This has been fixed.
- **November 2023 SF: 6721397**  
When filtering by author/creator using the checkbox and applying filters, no results displayed. This has been fixed.
- **November 2023 SF: 6764204, 6870180**  
Slow Create-loan APIs when there is a lot to index for Primo VE following the loan. This has been fixed.
- **November 2023 SF: 6227389, 6602566, 6651892, 6791531, 6796374, 6881582**  
For external data sources, facets were displayed in lowercase. This has been fixed.
- **November 2023 SF: 6656119**  
Collection discovery was very slow or not loading at all. This has been fixed.
- **November 2023 SF: 6496116, 6625468, 6778633 (Updated November 15, 2023)**  
The Resource Sharing Request form should not have populated Author and Article Title fields for Journals. This has been fixed to allow users to specify them.
- **November 2023 SF: 6632812**  
The request form was not reset and displayed error messages (in red). This has been fixed.
- **November 2023 SF: 6604436**  
Thumbnails for external records were not displaying for some cases. This has been fixed.
- **November 2023 SF: 6357162**  
Pickup institution for "request other issue" did not default to the home institution. This has been fixed.
- **November 2023 SF: 6305668, 06312696 (Updated February 6, 2024)**  
Exact subject search with parentheses failed. This fix requires you to set the new parameter **primo\_ve\_remove\_parentheses\_from\_query** to **true** on the Discovery Customer Settings page ([Configuration > Discovery > Other > Customer Settings](#)).
- **November 2023 SF: 5317479**  
Facet menu was not available when coming from saved search email alert. This has been fixed.
- **November 2023 SF: 6231054**  
Related records were not fully displayed in Get It. This has been fixed.
- **November 2023 SF: 6291918, 6521654**  
Request form should include Roman numeral 'X' for the ISBN field. This has been fixed.
- **November 2023 SF: 5324790, 6276017, 6286410, 6531215**  
Resource Sharing request created with "Not Needed After" date set to current date showed corresponding hold request as "Date Needed By" in the past. This has been fixed.