Highlights

July 2015

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1

Introduction

This section includes:

- **Purpose of This Document** on page 3
- **Product Interoperability Matrix** on page 4
- **Primo Documentation** on page 4

Purpose of This Document

This document summarizes the various enhancements and changes that are new for the April 2015 release of Primo. These updates are described under the following sections:

- **New User Experience Functionality** – The updates to the Front End include the following main enhancements:
  - Improved the Personal Ranking functionality.
  - Improved the ranking algorithm and added the ability to display a separate Primo location for each holdings record even if they belong to the same sublibrary and collection.
- **New Administration Tools Functionality** – The updates to the Back Office include the following main enhancements:
  - Added the ability to view additional logs from the Back Office.
  - Added the ability to update the search indexes on an ongoing basis.
  - Added Primo Analytics, which utilizes the Oracle Business Intelligence tools to create and run reports on end user usage of Primo functionality.
- **New Search and Ranking Functionality** – The updates to search and ranking include the following main enhancements:
  - Improved the support of inflections in Latin scripts and Hebrew.
  - Added various improvements to the Did You Mean functionality.

- **New Infrastructure Functionality** – The updates to Primo's infrastructure include the following main enhancements:
  - Added the Primo Authentication Manager, which currently supports user authentication and authorization using PDS.

Product Interoperability Matrix

The following table lists the minimum version that is needed for other Primo products to support some of the new features in Primo version 4.0 and later releases.

Table 1. Product Interoperability

Product	Version
Aleph (to allow OvP)	Aleph 18 with the April 2010 service pack (SP), Aleph 20.1 with the February 2010 SP, Aleph 22 (photocopy requests)
Voyager (to allow OvP)	Voyager 7.2 with the April SP (7.2.1)
MetaLib (to allow Find Database)	4.3.3
SFX	March 2010 revision

Primo Documentation

The following is a list of the primary documentation for Primo version 4 and later releases:

- *Primo Back Office Guide*
- *Primo Technical Guide*
- *Primo Interoperability Guide*

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New User Experience Functionality

This section includes:

- **Personalized Ranking** on page **5**
- **Support Aleph AVA per Holdings Records** on page **11**

Personalized Ranking

Purpose of Enhancement

This enhancement improves the algorithm that ranks Primo Central search results based on the user's personal settings (such as discipline) and enables all users (not just signed-in users) to specify personal settings.

Description

The personalized ranking settings (which were previously configurable by only signed-in users under My Account) are now configured from the Personalize your results area on the Brief Results page.

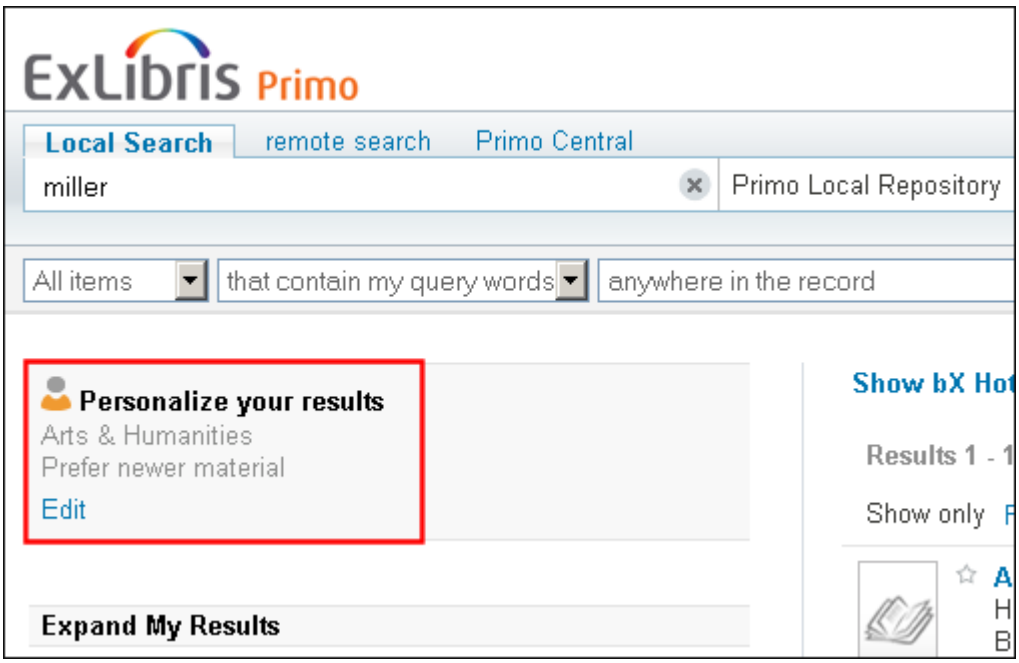

Figure 1: Personalize Your Results Area

NOTE:
The Personalize your results area displays only if searches return one or more results.

An ellipsis below the list of options indicate that the user has selected more options than are visible:

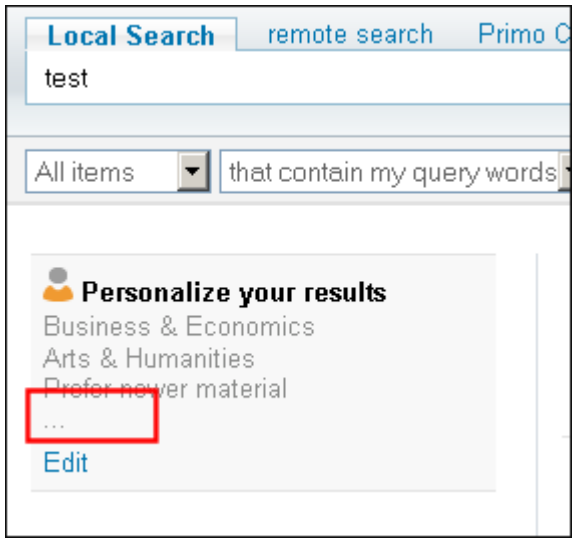

Figure 2: Additional Personalization Options

When searches are performed with any personalize ranking option selected, the Personalized button will appear above the search results. You can click this button to remove ranking for individual searches:

Figure 3: Personalized Ranking Button

Users can see which options have been selected by hovering the cursor over the button:

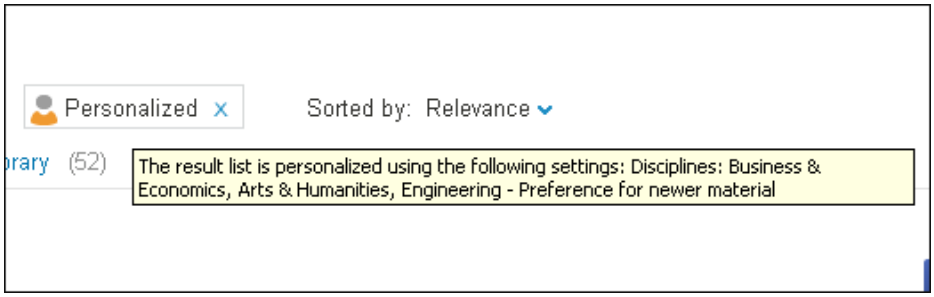

Figure 4: Viewing Selected Personalized Ranking Options

To configure personalized settings in the Front End:

1 Click **Edit** in the Personalize your results area to open the Personalize your results dialog box.

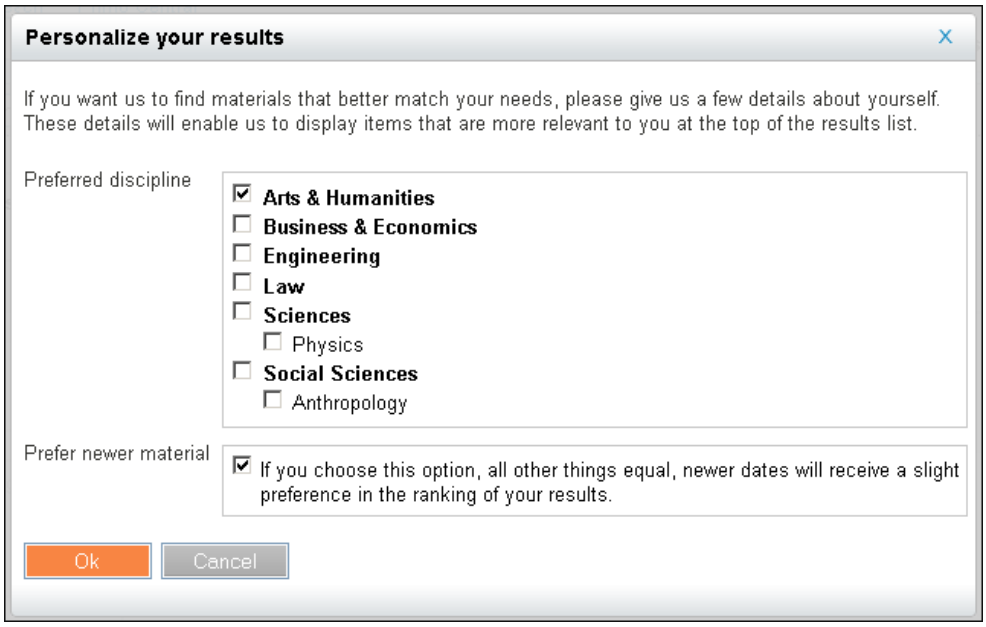

Figure 5: Personalize Your Results Dialog Box

2 Select up to five disciplines in the **Preferred discipline** field.

3 Select the **Prefer new material** option if you want to rank newer material higher in your results.

4 Click **OK**.

Back Office Configuration

The following table lists the changes to various components in the Back Office:

Table 2. Keeping this Item Tile Code Table

Component	Description
Views Wizard	The **Display "Personalize Your Results" pop-up page** option has been removed since the settings are now configured from the Brief Results page only. The **Enable the "Personalize Your Results" service** option will continue to enable this functionality for each view.

Table 2. Keeping this Item Tile Code Table

Component	Description
Personalize Your Results Disciplines Fields mapping table	The following changes have been made to this mapping table: ■ The **Part of broader discipline** column has been added to allow the categorization of disciplines and to allow users to drill down to specific areas within a discipline. ■ The **Business** and **Economics** disciplines have been merged into a single discipline called **Business & Economics**. ■ The following disciplines are now supported: Diet & Clinical Nutrition, History & Archaeology, Journalism & Communication, Materials Science, and Statistics.
Personalize Your Results Disciplines code table	The following changes have been made to this code table: ■ The codes for the **Business** and **Economics** disciplines have been removed and replaced with the following code: **pyr.discipline.business_economics**. ■ Additional codes have been added to support the following disciplines: Diet & Clinical Nutrition, History & Archaeology, Journalism & Communication, Materials Science, and Statistics.

Table 2. Keeping this Item Tile Code Table

Component	Description
Personalize Your Results Labels code table	The following changes have been made to this code table: ■ The codes for the **Business** and **Economics** disciplines have been removed and replaced with the following code: pyr.discipline.business_economics ■ The following codes have been removed: pyr.discipline, pyr.degree, pyr.popup.help, pyr.popup.selectdegree, pyr.popu.initial.no, and pyr.myaccount.label. ■ Codes have been added to support additional labels: ■ pyr.popup.discipline – Preferred discipline ■ pyr.popup.date – Prefer newer material ■ pyr.popup.help – If you want us to find materials that better match your needs, please give us a few details about yourself. These details will enable us to display items that are more relevant to you at the top of the results list. ■ pyr.popup.date_help – If you choose this option, all other things equal, newer dates will receive a slight preference in the ranking of your results. ■ pyr.search.label – Personalize your results ■ pyr.search.recent_date – Prefer newer material ■ pyr.search.edit – Edit ■ pyr.icon.label – Personalized ■ pyr.icon.tooltip.general – The result list is personalized using the following settings: ■ pyr.icon.tooltip.disciplines – Disciplines: ■ default.pyr.icon.tooltip.date – Preference for newer material

Table 2. Keeping this Item Tile Code Table

Component	Description
Error messages	Added the following code, which displays a message when the maximum number of disciplines has been selected: validation.pyr.maxDisciplines – You have reached the maximum number of disciplines. Please select up to five.
Primo Analytics	The following actions were added to the Actions Subject Area to support personalized results profiles. ■ Update Personalized Results Profile – End users who update their personalized results profile. ■ Remove Personalized Results Profile – End users who have removed their personalized results profile. **NOTE:** The above reports begin tracking after the update to the Primo July 2015 release.

Support Aleph AVA per Holdings Records

Purpose of Enhancement

This enhancement enables Aleph customers to display a separate Primo location for each holdings record even if they belong to the same sublibrary and collection. Previously, the holdings records and associated notes were merged and displayed as a single Primo location in the Locations tab.

Description

The **HoldingRecordID** matching method has been added to the ILS API Configuration mapping table to provide matching at the holdings record level.

To utilize this functionality, you must perform the following configuration changes:

1 In Aleph, configure the extract from Primo to use the new expand procedure `expand_doc_bib_avail_hol` (which is available with Aleph 22). This procedure creates an AVA field per holdings record, which includes some

additional subfields: $t (copy number), $z (public note), and $7 (holdings record ID).

2 In Primo, perform the following actions:

a Update the normalization rules of the display/availlibrary field to include changes to the AVA field. The $$H element (which includes the holdings record ID) has been added to the out-of-the-box normalization rules templates. You may want to append the call number to the display/availibrary field to differentiate the Primo locations.

b Run a complete pipe (including harvesting) to include the changes to the AVA field.

c Update the following fields in the ILS API Configuration mapping table under the OPAC via Primo subsystem to specify the new matching method:

- **Adaptor ID** – Select **ALEPH_22** from the drop-down list.
- **Match for Holdings** – Select the **HoldingsRecordID** option from the drop-down list.

d Deploy the **OPAC via Primo Mapping Tables** option on the Primo Home > Deploy All page.

3

New Administration Tools Functionality

This section includes:

- **Pipe Debugging** on page **13**
- **Ongoing Indexing** on page **15**
- **Primo Analytics** on page **17**

Pipe Debugging

Purpose of Enhancement

This enhancement enables staff users to view additional logs from the Back Office and improves the display of some logs.

Description

The following changes have been made to the Primo Home > Monitor Primo Status > Job Details page:

- Added the following links to view the `DedupGrouper.log` and `FrbrGrouper.log` files (which are stored on the server) from the Back Office, respectively: **View Dedup Log** and **View FRBR Log**.
- Added the Download icon to allow staff users to download the log file locally.

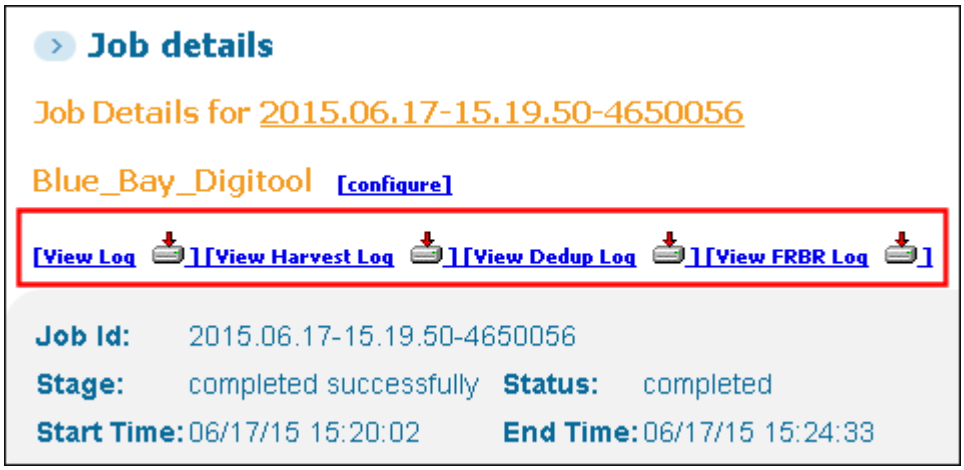

Figure 6: Job Details Page

The following changes have been made for the pipe logs on the Primo Home > Monitor Primo Status > Pipe Monitoring > Process Log page:

- Improved the display of the log files.
- Added the following buttons:
  - **Refresh** – Refreshes the screen to display updated status of the log file.
  - **Download Log** – Downloads a copy of the log file to your local machine.

Figure 7: Example Pipe Log

The following changes have been made for the tool process logs on the Primo Home > Monitor Primo Status > Tools Monitoring > Tools Process Log page:

- Improved the display of the log files.
- Added the following buttons:
  - **Refresh** – Refreshes the screen to display updated status of the log file.
  - **Download Log** – Downloads a copy of the log file to your local machine.

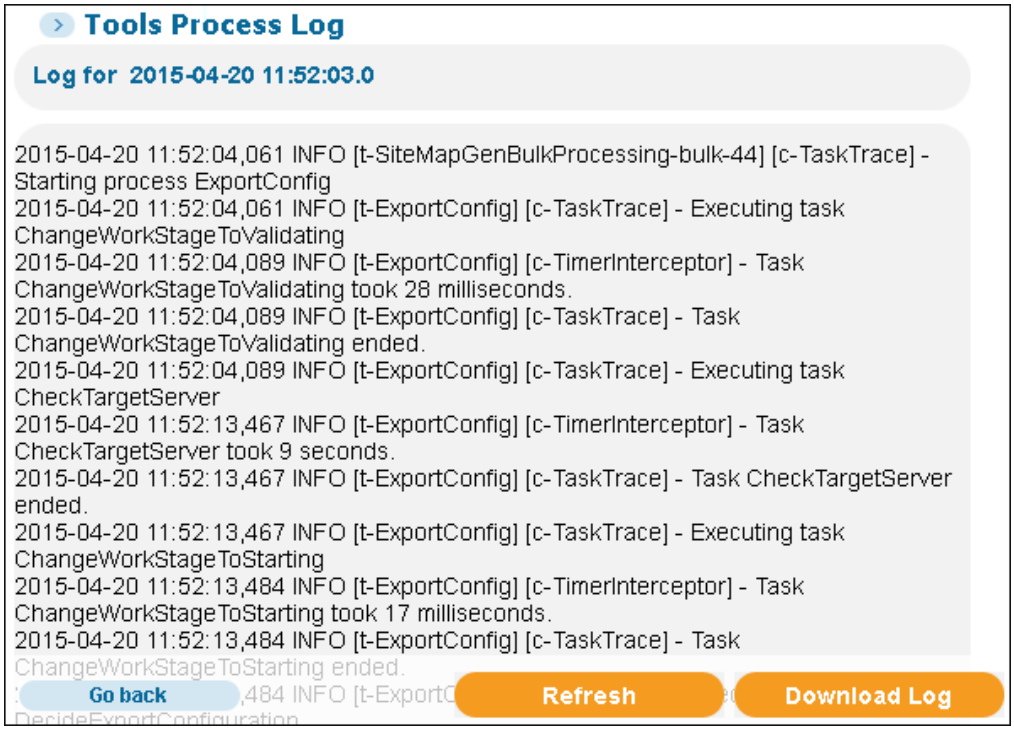

Figure 8: Example Tools Process Log

Ongoing Indexing

Purpose of Enhancement

This enhancement allows indexing to be run on an ongoing basis for institutions in a multitenant environment, enabling indexes to be updated more quickly for institutions.

NOTE:
This functionality is being released gradually in multitenant environments and requires provisioning from Ex Libris.

Description

Ongoing indexing is a new indexing mechanism that uses a queue to run indexing processes in parallel with other back office processes (such as pipes and tools). This allows records added to the queue to be indexed on an ongoing basis until the daily scheduled hotswapping process runs. This means that pipes may be indexed and hotswapped in stages. The status of the pipe in terms of indexing and hotswapping will be available in the Back Office monitoring pages.

Monitoring

For environments in which Ongoing Indexing is active, the following changes have been made to the monitoring pages in the Back Office:

- The **Primo Home > Monitor Primo Status > Process Monitoring** and **Job Monitoring** pages now display a single line for the ongoing indexing process.

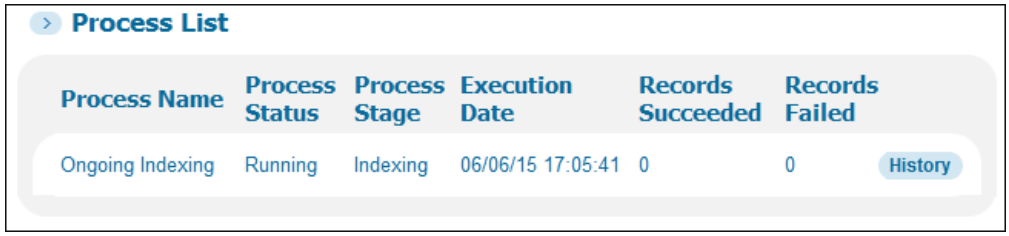

Figure 9: Ongoing Indexing Status Line

The new line includes the following information:

- **Process Name** – Ongoing Indexing
- **Process status** – The following statuses are possible. They are relevant to all the stages except for the Completed stage:
  - **Running**
  - **Stopped** – The indexer has been stopped.
  - **Stopped Error** – The Indexer stopped with an error. For example, if the mirror gets corrupted and auto-recovery is set to **false**, the indexer will not start.
  - **Completed** – The Completed stage.
- **Process stage** – The following stages are possible:
  - **Indexing**
  - **Hotswapping**
  - **Reindexing**

- **Recovering**
- **Completed** – This stage is seen on the history monitoring page only.

- **Execution date** – The start time of the active indexing run.
- **Record succeeded** – The number of records that were successfully indexed.
- **Records failed** – The number of records that the system failed to index.
- The **History** option allows you to display a list of the previous runs of the indexing daemon.

- The Indexing Data section has been added to the **Primo Home > Monitor Primo Status > Pipe Monitoring** > **Job Details** page. This section includes the following information:
  - **Number of records** – The number of records that were normalized by the pipe.
  - **Waiting for Indexing** – The number of records remaining in the indexing queue.
  - **Indexed** – The number of records that have been indexed.
  - **Hotswapped** – The number of records that have been hotswapped.

  When the number of hotswapped records equals the number of normalized records, this indicates that all of the records from the pipe have been indexed and are available for discovery.

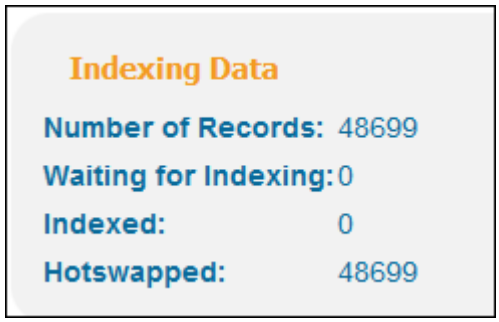

Figure 10: Indexing Data Section on Job Details Page

Primo Analytics

Purpose of Enhancement

This enhancement enables staff users to utilize the Oracle Business Intelligence tools to create and run reports on end user usage of Primo functionality. Groups of reports can be displayed in customizable dashboards. Users can share reports

and dashboards that they create with other users in their institution or in other institutions. These reports can help you to understand how Primo is being used and decide whether changes are necessary in the system.

NOTE:
This functionality is being released gradually to customers and requires provisioning from Ex Libris.

Description

The **Primo Home > Primo Analytics** interface can be accessed by any institution-level Back Office role. All staff users can activate reports and also create new reports using data belonging to the institution.

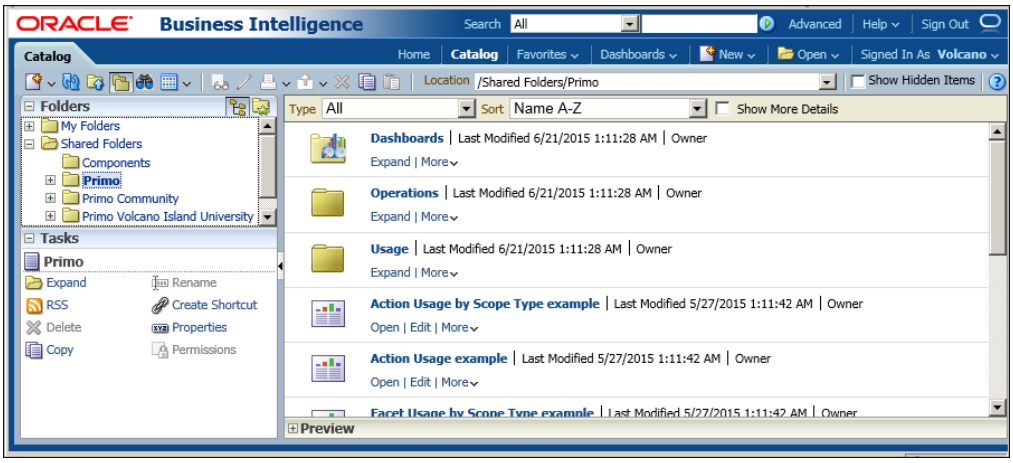

Figure 11: Primo Analytics Interface - Showing Out-of-the-Box Reports

NOTE:
If you have a "central institution" that is used for only harvesting shared data sources, accessing Primo Analytics with users that belong to an institution will enable them to view only operations-related reports regarding pipes and PNX records. In addition, if the "central institution" has a view that is in use, users will be able to view usage-related reports.

Reports in Primo Analytics can be based on data that is organized by subject areas that include two broad categories:

- **Usage** – Subject areas that are related to usage of the Primo Front End.
  - Primo Action – Provides information on end-user use of the various Primo functionality.
  - Primo Facets – Provides information on facet usage.
  - Primo Popular Searches – Lists the details for the most popular searches.

  - Primo Sessions – Provides information on Primo sessions.
  - Primo Zero Result Searches – Lists the details for searches that found no results.
- **Operations** – Subject areas that are related to Primo Back Office processes and Primo's database:
  - Primo Pipes – Provides details on Primo pipes processing.
  - Primo PNX Records – Provides information on PNX records.

For more information on creating reports and using the Primo Analytics interface, see the *Primo Analytics Guide*.

4

New Search and Ranking Functionality

This section includes:

- **Enable Inflections for Multiple Languages** on page **21**
- **Did You Mean Improvements** on page **22**

Enable Inflections for Multiple Languages

Purpose of Enhancement

The following improvements for English searches have been extended to other languages that use the Latin script and Hebrew:

- Primo will attempt to fix spelling mistakes. Corrections for spelling mistakes are limited to cases where a maximum of five corrections can be generated, and are applied only to searches in the title field.
- Primo will expand the original query with inflections in the title field. Examples of inflections:
  - The root form of a word: For example: going > go, computers > computer
  - If the word is a noun, use the plural form of the word. For example: human right > human rights
  - If the word is a verb, use simple past, past participles, and third person singular forms. For example: go > went, gone, and goes

Non-English examples:

- German: öffentlich > öffentlicher
- French: inversée > inversés

Did You Mean Improvements

Purpose of Enhancement

This enhancement includes the following improvements to DYM (Did You Mean) suggestions:

- The existing DYM index was replaced with an alternative index that enforces the suggested word to be within a single character of the query term: one insertion of a letter, one deletion of a letter, one replacement of a letter, or one transpose of two letters.
- The index is based on the Title and Creator fields only, and whether the check has results.
- A suggested query must have more than five times the number of results of the original query.
- DYM will activate for the following:
  - One word queries that have a minimum of 5 characters.
  - Multiple word queries that have a minimum of 4 characters.

5

New Infrastructure Functionality

This section includes:

- **Primo Authentication Manager** on page **23**

Primo Authentication Manager

Purpose of Enhancement

This enhancement modifies how the Patron Directory Services (PDS) configuration wizard is accessed and provides the groundwork for future authentication methods.

Description

The following changes have been made to the Back Office to support the new authentication manager.

- The User Authentication Wizard (Primo Home > Ongoing Configuration Wizard > User Authentication Wizard) has been added to support multiple user authentication managers (currently PDS).

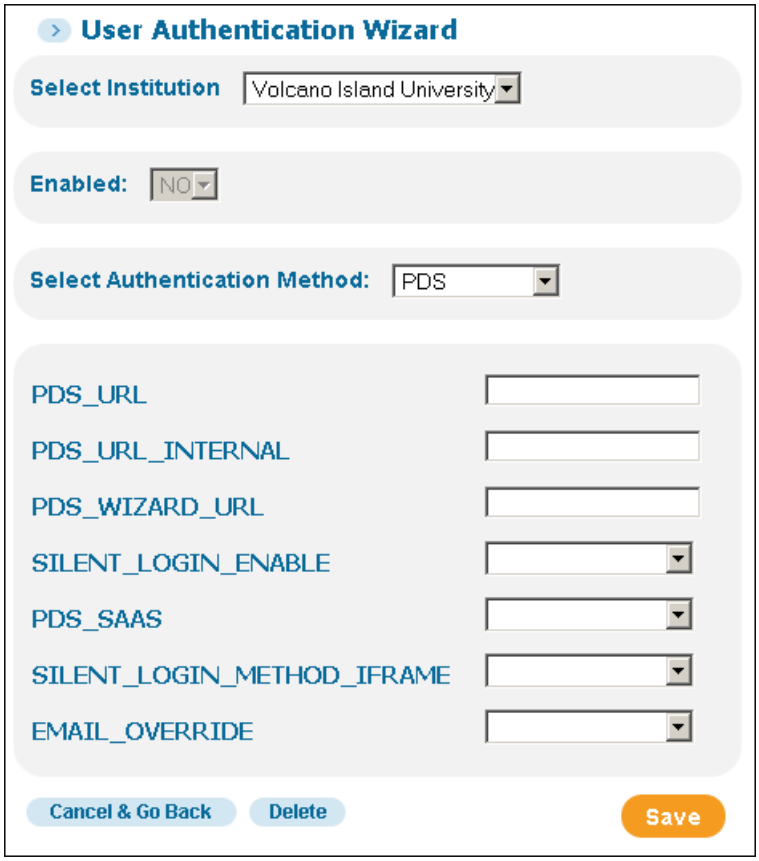

Figure 12: User Authentication Wizard - PDS

- The PDS configuration parameters that were defined with the General Configuration Wizard and the PDS Configuration mapping table have been moved to the new User Authentication Wizard (Primo Home > Ongoing Configuration Wizard > User Authentication Wizard).

For more information on configuring PDS, see the *Primo Back Office Guide*.