# ExLibris Primo

**Release:** May 2016

## Highlights:

### User Experience -

• **Citation Trails** - Primo Central has added "cited" and "cited by" relations to many articles, enabling users to view these relations by clicking the new **Citations** and **Cited by** links in the brief and full view of an item. From citation lists, users can browse between lists to follow a chain of citations and to learn more about the intended topic. The original title will appear at the top of each citation list to provide context for users. Because the citation lists are not comprehensive and are meant to be used as an exploratory service, the total number of citations will not appear in the citation lists. The citation links will appear automatically for Primo Central articles after the installation of the the May release.

• **Ascending Date Sort** - This enhancement adds an out-of-the-box option that allows you to sort records in ascending order. To use this functionality, you will only need to enable the new date sort in the Views Wizard.
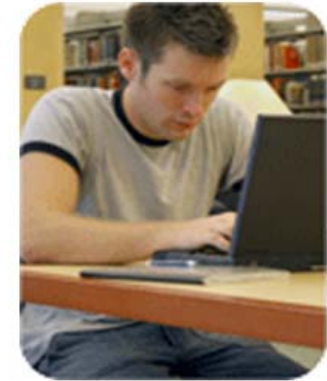
### Primo Analytics -

• **Support of Referrer and User Groups** - This enhancement enables the system to collect referrer and user group information so that customers can retrieve useful information regarding the usage of their libraries. The collection of this data will start with this release and be available for reporting in Primo Analytics during the August 2016 release.

• **Primo Analytics APIs** - One of the most voted items in the Ideas exchange is now coming to life. This enhancement enables you to use APIs to display reports and retrieve information from Primo Analytics. For for more information, refer to the following page in the Developer's Network:

https://developers.exlibrisgroup.com /primo/apis/Analytics

### IPV6 Support -

This enhancement enables customers to utilize IPV6 networks without changing the configuration. To support this functionality, the IP fields in the Institution Wizard and various mapping and code tables now support both IPV6 and IPV4 addresses.

## New User Interface -

The general release of the new Front End UI is coming in August. In the meantime, you are welcome to check out its improvements and new features in relation to your environment. Please feel free to send feedback to the following email address:

Primo-new-ui@exlibrisgroup.com

To see the new Front End UI, use the new syntax for the URL:

    <server:port> /primo-explore/search?vid=<YOUR_VIEW>

This version of the new UI includes a new display for the full results, requests and locations options for Alma and Voyager customers, support for the services page, improvements to the availability link performance, and much more.

Notes:
 • Not all Primo features are available on the UI, yet. All of the the accessibility issues and support for mobile, advanced search, and bX will be available with the August release. More details about the next UI release will be available soon in the Documentation Center.

 • This pre-release version is best viewed with Chrome.

## Documentation and Webinars:

More information can be found in the Primo May 2016 Release Notes in the Ex Libris Knowledge Center:
 • Knowledge Center > Primo  > Release Notes
 • Knowledge Center > Primo  > Product Documentation > Highlights
Updated versions of both documents will be published on April 28, 2016.

We also invite you to attend one of the following Webinar sessions:
 • Primo May Release Webinar – APAC and Middle East
    April 27 at 5 GMT
Register here

 • Primo May Release Webinar – America and Europe
    April 27 at 15 GMT
Register here

# May 2016 - Primo Defect Fixes

| Description | Implementation Notes | Module | Case Number | Preconfigured |
|---|---|---|---|---|
| There were pipe execution errors due to the inability to recognize files with a date of 29/2. This has been fixed. | | Publishing Platform-Pipe Execution | | Yes |
| For Alma multicampus configurations in which multiple Primo institutions were defined with the same Alma institution, RTA failed for records that belonged to the institution of the view. This has been fixed. | | | 149897, 157213, 111555, 127850 | Yes |
| The $$9 field was not copied from the enrichment/availability field to the display/availlibrary field in the PNX. This has been fixed to display the correct availability. | In order for the fix to take place, customers should reload the relevant data. | | 103998, 128233 | Yes |
| When adding IP ranges for an institution, a check has been added to verify that there are no overlaps between ranges. | | | | Yes |
| When using Primo behind a proxy server, the saved search URL was using the Primo physical server as the base url instead of the proxy base URL. This has been fixed. | | Front End - Alerts, Front End - Basic Search | | Yes |
| The "Extract and arrange XML elements" normalization transformation has been changed to always use UTF-8 encoding to prevent errors when data contains diacritics. | | | | Yes |
| There was an issue loading the Remove Duplicates Enrichment parameters from the Plugins Parameters mapping table, which prevented the enrichment from working properly. This has been fixed. | | | | Yes |
| When Google links were configured to display in the Links section of the Details tab, the Google link did not display if it was the only link in the PNX record. This has been fixed. | | | 141489 | Yes |
| Records with diacritic characters could only be retrieved by searches with plain Latin characters. This has been fixed. | | Search Engine - Indexing | 184137, 127490 | Yes |
| The mouse-over text for the Delete Condition button (-) in the Normalization Rules Editor has been change to Delete condition. | | | 162064 | Yes |
| The Generate Sitemap tool (Primo Home > Monitor Primo Status > Tools Monitoring) did not allow users to create the tool using the default scope. This has been fixed. | | Primo Tools - Generate Sitemap | 173811, 176283 | Yes |
| When the out-of-the-box delivery option for the Alma-D delivery category was changed to Get It instead of View It, the following issues occurred if access was restricted to digital objects and the record contained physical inventory:<br><br>    1. The system did not dedup the two Get It tabs - one for Alma-D and one for Alma-P.<br>    2. The system did not display the "more" option in the Get It tab created for the Alma-D delivery category.<br><br>This has been fixed. | | | 182795 | |

# May 2016 - Primo Defect Fixes

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| Removing a resource type caused the Material Type to be inaccessible for editing in the advanced and basic search tiles of a view. This has been fixed. | | BO configuration - Code & Mapping Tables, BO configuration - Views Wizard | 167179, 198106, 203357, 205267 | Yes |
| The sign-in link on the Alma Get It tab returned an error page. This has been fixed | | | 187757 | Yes |
| In some cases, the last Japanese character was removed form the search query. This has been fixed. | | | 175761, 189007 | Yes |
| When searching for multiple Japanese search terms in the TOC field, no results were returned. This has been fixed. | | | 189238 | Yes |
| Tag searches in Japanese interface did not work. This has been fixed. | | | 177191 | Yes |
| Because Japanese queries that consist of only Chinese characters (Kanji; example: 単純接触効果) are identified as Japanese, these queries will follow the Japanese tokenization rules and will match only Japanese documents that were tokenized in a similar manner.<br><br>Note: This change will not apply if the locale of customer is Chinese, Japanese, or Korean. (They will be identified according to their locale.) | | | | Yes |
| When performing blended searches that resulted in a timeout with no results, the following message was returned:<br>"An unexpected error has occurred"<br><br>This result has been changed to return the following message:<br>"Due to temporary technical problem the result list may be incomplete. Please try again soon" | | | 177892, 185528, 194193, 194323, 199720, 202658, 204088 | Yes |
| The icons used for the Personalize your Results feature were transferred to background-images in the Primo CSS file to allow you to customize them in the Primo CSS. These icons are controlled by the following classes in the CSS:<br>- EXLMyAccountRankingImage<br>- EXLMyAccountRankingImageRemove | | | 171377 | Yes |

# May 2016 - Primo Defect Fixes

| Description | Implementation Notes | Module | Case Number | Preconfigured |
|---|---|---|---|---|
| The Include/Exclude Subfields (starts with) transformation has been added and allows the following options:<br><br>    * Include - This option can be used with the Split Field transformation to split information from a single subfield value into separate PNX fields.<br><br>        include@@<starts with value to match - not case sensitive>@@<separator to include><br><br>    * Exclude - This option can be used to exclude specific subfields (starting with a particular value) from the PNX record.<br><br>        exclude@@<starts with value to match - not case sensitive><br><br>For example, if Alma includes a subfield 0 with the authority control ID (for Browse) in the author (1XX, 7XX) and subject (6XX) fields and is planning to add additional 0 subfields with linked data to these fields, this transformation can be used to exclude subfields '0' if they start with (Uri) from Browse, and it can be used to include subfields '0' if they start with (Uri) in a linked data field. | | | | Yes |
| While running pipes that exceeded the default 10,000 records, there was an issue deduping records using the C5 field if the dedup process was run in the Back Office memory. This has been fixed. | | | | Yes |
| It is now possible to configure two active SAML authentication profiles. | | Front End - Sign In | 201577 | |
| The AUTH_BASE_URL parameter (which is optional) has been added to the SAML authorization configuration page (Primo Home > Ongoing Configuration Wizards > User Authentication Wizard > Login Profile) to support a different base URL for each institution in the same Primo environment.<br><br>The URL should be in the following format:<br><protocol>://<base_url><br><br>For example:<br>https://www.primo.com | | | | Yes |
| The deployment of the General Configuration mapping table at the institution level inadvertently changed the date format settings of other institutions to the out-of-the-box settings. This has been fixed. | | | 200131, 208614 | Yes |
| An error page resulted while trying to print or send items by email from the e-Shelf. This has been fixed. | | | 202499, 203208, 205438, 206162, 211520, 213316, 28115 | Yes |
| In some cases, accessing the Define Pipe page from the pipe's Job Details page saved incorrect pipe settings. This has been fixed. | | | 204417 | Yes |

# May 2016 - Primo Defect Fixes

| Description | Implementation Notes | Module | Case Number | Preconfigured |
|---|---|---|---|---|
| While performing collection discovery, an error message resulted when users clicked the "Back to results list" link from an item's full view page. This has been fixed. | | | | Yes |
| Hebrew Inflections are now also performed on the Subject field. | | | | Yes |
| Primo has upgraded to reCaptcha version 2. To activate this service, see the Implementation Notes. | To activate reCaptcha version 2 from the Back Office:<br>1. On the General Configuration page (Primo Home > Advanced Configuration > General Configuration Wizard) select the E-mail and SMS Configuration subsystem.<br>2. Specify the following fields:<br>- Activate Captcha [Y/N] - Set to Y.<br>- Private Captcha Key' - Type the value of the 'secret key' that you received from Google.<br>- Public Captcha Key' - Type the value of the 'site key' that you received from Google.<br>3.click save | | | No |

# May 2016 - Primo Defect Fixes

| Description | Implementation Notes | Module | Case Number | Preconfigured |
|---|---|---|---|---|
| The following fixes were made to the Rosetta Template:<br>1.<br>Field: control/colldiscovery<br>Note: Required for the link to Collection Discovery from the details tab to work.<br>Description:<br>Two changes:<br>* The last rule to append the institution to this field based on delivery/institution field was present 3 times, but it is needed only once. The two unnecessary occurrences were deleted.<br>* The transformation in this rule was changed from "Add period at the end" to "Add to the beginning of the string"<br><br>2.<br>Field: display/ispartof<br>Note: Prevents the dcterms:isPartOf xsi:type="collection" from displaying.<br>Description:<br>Added a condition to the rule with dcterms:ispartof as the source to prevent the dcterms:isPartOf when the xsi type is collection so that the collection ID does not display. The regular expression checks if the content is digits.<br>Conditions Logic: true<br>Conditions Logic 1: true<br>Source: XML/dcterms:isPartOf<br>Success if: Match any<br>Routine: Validate (use reg. exp.) / ^(\d+)$ | If you have normalization rules that were copied from the Rosetta Template and you want to implement any of the reported changes in your local rules, you have the option of "Synchronizing" with the template by invoking the "Reset" button at the bottom of the rules editor page for the specific PNX field. Note that if you made any changes to the rule, these changes will be overridden. If you made changes and do not want to override all of the rules for the target PNX field, you can implement the changes manually by following the release notes. | | | No |
| While performing collection discovery, an error message resulted when users attempted to sort by title from the page that lists a collection's items. This has been fixed. | | | | Yes |
| After receiving a validation error while adding an IP range on the Edit IPs page (Primo Home > Ongoing Configuration Wizards > Institution Wizard), users were not able to add or edit IP ranges without exiting and returning to the page. This has been fixed. | | | | Yes |
| In some cases in which there were multiple normalization rules that depended on each other, empty PNX fields were created. This has been fixed. | | BO configuration - Normalization rule configuration | | Yes |
| The following changes have been made to the Alma MARC Template:<br><br>  Field: browse/author and browse/subject<br>  Description: Change the existing rules for subfield $0.<br>  For subfield $0, a new transformation was added to ensure that linked data information in subfield $0 starting with (Uri) will not be included in $$I – intended for Authority control ID information.<br>  Transformation: Include/Exclude Subfields (starts with): exclude@@(Uri) | | BO office UI - Normalization Rules Sets | | |

# May 2016 - Primo Defect Fixes

| Description | Implementation Notes | Module | Case Number | Preconfigured |
|---|---|---|---|---|
| The changes below have been made to the Alma UNIMARCTemplate<br><br>Alma publishing to Primo options allows inclusion of headings enrichment data for author and subject information. For each UNIMARC record published to Primo, Alma enables you to include authority headings information. To correctly handle this authority headings information, the following changes have been made in the Alma UNIMARC template:<br><br>1. Field browse:author<br>Description:<br>1.1 Add new rules to the following fields: 700, 701, 702, 710, 711, 712, 716, 720, 721, 722<br>New rule for subfield $0 (Contains the Alma authority control record ID.)<br>New rule for subfield $9 (Contains indication whether term in authorized field is preferred or nonpreferred.)<br>Note: For subfield $0, a new transformation has been added to ensure that linked data information in subfield $0 starting with (Uri) will not be included in $$I – intended for Authority control ID information.<br><br>1.2 Add subfield $0 and $9 in the exclude subfield section for $$E for the following fields: 701, 702, 710, 711, 712 - to ensure the authority headings information is not included in the display. | | BO office UI - Normalization Rules Sets | | |

# May 2016 - Primo Defect Fixes

| Description | Implementation Notes | Module | Case Number | Preconfigured |
|---|---|---|---|---|
| 2. Field: browse:subject<br>Description:<br> 2.1 Add new rules to the following fields: 600, 601, 602, 604, 605, 606, 607, 608, 610, 615, 616, 617<br> New rules for subfield $2 (Contains the vocabulary code used for authorization. The current supported values include: LCSH, LCNAMES, MESH, LCAC)<br> New rules for subfield $0 (Contains the Alma authority control record ID.)<br> New rules for subfield $9 (Contains indication whether term in authorized field is preferred or nonpreferred.)<br> Note: For subfield $0, a new transformation was added to ensure that linked data information in subfield $0 starting with (Uri) will not be included in $$I – intended for Authority control ID information.<br><br> 2.2 Enabled all rules<br><br> 2.3 Added subfield $0, $2 and $9 in the exclude subfield section for $$E for the following fields: 600, 601,602, 604, 605, 606, 607, 608, 610, 615, 616, 617 - to ensure the authority headings information is not included in the display.<br><br> 3. In Alma UNIMARC - display, Facet, FRBR and addata sections<br> 3.1 Add condition to existing rules - > unless subfield 9 equals 'N'<br> Do this for following fields:<br> 410 411 416 500<br> 600 601 602 605 606 607 616 617<br> 700 701 702 703 710 711 712 713 720 721 722 723 730 740, 741, 742 | | | | |

# May 2016 - PC Defect Fixes

| Description | Implementation Notes | Module | Case Number | Preconfigured |
|---|---|---|---|---|
| Previously, an indexed record and an item in the institutional holdings file could be matched by the title alone, which caused false matches. To resolve the false matches, the item must now match the title and the resource type. | | Primo Central | 179149, 178805, 179893, 192388, 43347, 86373, 110593, 128108, 137546, 138211 | Yes |
| When items in the institutional holdings file had Hebrew characters in the title and did not have an ISSN or ISBN, these items were incorrectly marked as not having full text available. This has been fixed. | | | 172462, 24038, 52408 | Yes |
| Some words caused the system to expand the Primo Central search results to full text unnecessarily, causing the following issues:<br>  - irrelevant results<br>  - wildcard queries (without expansion to full text) returned less results than the whole word<br><br>This has been fixed. | | Primo Central | 153730, 88212 | Yes |
| Improved 1-3 word topic searches in Primo Central by boosting titles that have an exact subject match, but do not necessarily have an exact title match. This allows topic-related documents to appear earlier in the results. | | | | Yes |
| A number of unrelated records were incorrectly grouped together and attempts to split them failed. This has been fixed and now the records are no longer grouped together. | | | 140875 | Yes |
| Issues with Hebrew inflections created different queries between the original query and the facet queries, which then caused different facet counts. This has been fixed. | | | | Yes |
| When searching with multiple terms and wildcards, the wildcard terms were not searched in the full-text field. This has been fixed and will now be searched with the other terms as a proximity query. | | | 180166, 181199 | Yes |