

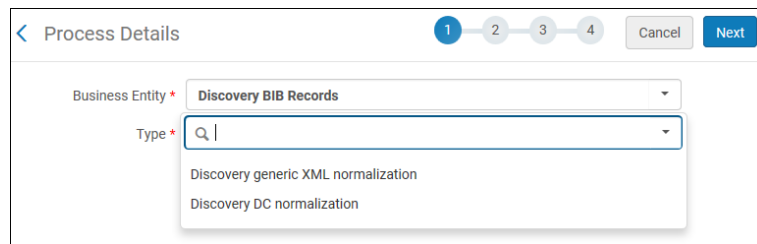
Primo VE February 2018 Release Notes

Improved Workflow for the Normalization of External Resources

This enhancement improves the workflow of creating normalization process tasks. After clicking **Normalization Process Task** under **Configuration Menu > Discovery > Loading External Data Sources**, you will now follow a simpler flow to define the normalization process tasks and group rules together. In addition, this workflow extends to other types of data formats (such as generic XML).

The following changes have been made to the Process List page (**Configuration Menu > Discovery > Loading External Data Sources > Normalization Process Task**):

1. Added the **Discovery BIB Records** business entity to categorize and filter processes associated with the normalization of external records for Primo VE.



Normalization Process Tasks

2. Changed the name of type **Qualified DC Normalization** to **Discovery DC normalization** for DC normalization process tasks.
3. Added the type **Discovery generic XML normalization** to support generic XML normalization process tasks. For more information, see [Loading Records from External Sources \(Generic XML Format\)](#).

Loading Records from External Sources (Generic XML Format)

This enhancement allows you to import records from external sources into Primo VE for discovery in your local catalog, using a generic XML format. With the use of XML normalization rules and a discovery import profile, the generic XML records can be mapped and normalized into Primo VE's expanded DC schema.

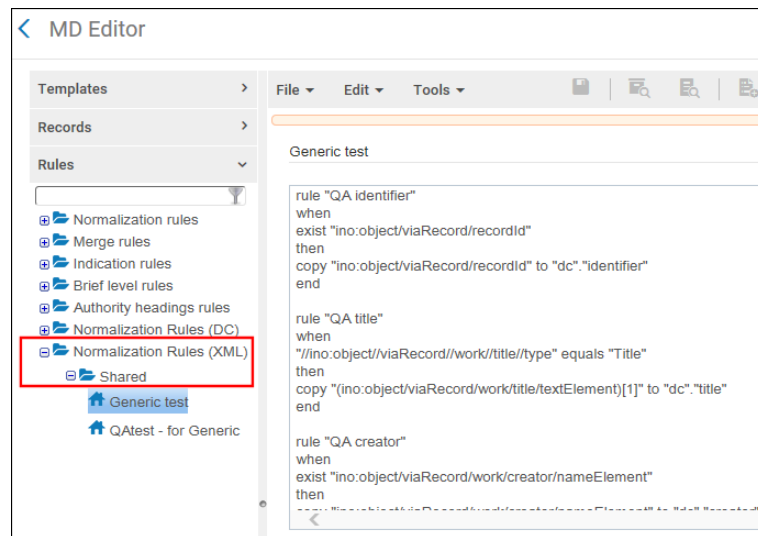
Note

These records are loaded into Primo VE directly and cannot be searched and viewed using Alma's repository search.

This configuration uses the following workflow, which incorporates existing Alma configurations and modifications needed to import and normalize the generic XML records into Primo VE:

1. Define the XML normalization rules in the MD Editor (**Configuration Menu > Discovery > Loading External Data Sources > Normalization Rules for External Data Sources**). The Normalization Rules (XML) folder has been

added to the Rules section in the MD Editor so that you can map and normalize the external XML records into Primo VE's expanded DC schema for discovery. For more information, see [Configuring Normalization Rules for Primo VE](#).



Rules Section in the MD Editor

2. Create an XML normalization process task (**Configuration Menu > Discovery > Loading External Data Sources > Normalization Process Task**). For more information, see [Creating a Normalization Process Task](#). To support this functionality, the following options have been added to this workflow:

- The **Discovery generic XML normalization** import type indicates that this normalization process includes XML normalization tasks.

Process Details - Step 1

- The **Generic XML - Normalization** task type indicates that this task contains XML normalization rules.

Name	Description
<input type="checkbox"/> Generic XML - Normalization	Import generic XML Drool Normalization

Add Task Dialog Box

3. Test your normalization process task and normalization rules (**Configuration Menu > Discovery > Loading External Data Sources > Test Normalization Rules**). For more information, see [Testing Normalization Rules for External Data Sources](#). To support this functionality, the **Generic XML** record type option has been added to the Testing Normalization of non-Alma Primo VE Records page.

Testing Normalization of non-Alma Primo VE records

Testing External Discovery Records

Select record type: ☐ DC ☒ Generic XML

Browse for file: [] Upload

Select test type: ☒ Normalization rule ☐ Normalization process

Normalization rule: test1 Run test

Source Record: []

Normalized Record: No records were found.

Testing Normalization of Non-Alma Primo VE Records Page

- and Create a **Discovery** import profile (**Configuration Menu > Discovery > Loading External Data Sources > Discovery Import Profiles**) for the external data source. For more information, see [Configuring Import Profiles for Primo VE](#). To support this functionality, the following fields have been modified or added to the Import Profile Details page (Step 2 of the import workflow):

Import Profile Details Fields for Generic XML Normalization

Field	Description
Profile Details:	
Source format (modified)	Select the new Generic XML option to process records that are stored in a generic XML format.
File Splitter Parameters (new section and fields):	
Root element tag	The XPath to the first tag in the file.
Record elements tag	The XPath to the beginning of a record. A file may contain one or more records.
XPath to the identifier tag	The XPath to the identifier tag of the record. This should be the tag that contains the unique identifier for the record.
XPath to the location of the deleted status	The XPath to the location of the deleted status of the record. Default value for a record is: deleted = false.
Delete record regular expression	This regular expression is applied to the value found under the XPath to the location of the deleted status field. If the regular expression matches the value found, the record is marked as deleted.

Import Profile Details (Step 2)

Profile name *

Profile description

Data Source Code *

Data Source Label *

Originating system *

File name patterns

Import Protocol: Upload File/s

Physical source format: XML

Source format: **Generic XML**

Target format: Dublin Core

Status: Active

File splitter parameters

Root element tag *

Record elements tag *

XPath to the identifier tag *

XPath to the location of the deleted status

Delete record regular expression

Import Profile Details Page (Step 2)

- Run and monitor the import profile.

Create Bibliographic Record Sets Using the Primo VE Index

Previously, sets could be created for records that were stored in Alma only. This enhancement extends this capability to allow staff users to create a set of records that are based on conditions defined in the Primo VE index (such as records of a specific Primo VE resource type). Once a set is created, jobs and processes can be run on the records of that set in Alma. For more information creating sets, see [Managing Search Queries and Sets](#).

To create a set:

- Open the Manage Sets page (**Admin > Manage Jobs and Sets > Manage Sets**).
- Select one of the following set types from the **Add Set** drop-down list: **Logical** or **Itemized**.
- On the Set Details page, make sure that select the **Discovery** option for the new **Content Origin** field.

Set Details (Logical Set)

Set name *

Description

Note

Set content type: All Titles

Set type: Logical

Private: ☒ Yes ☐ No

Status: ☒ Active ☐ Inactive

Creation date: 01/20/2018 16:27:23 MST

Created by: Ex Libris

Updated by: Ex Libris

Content Origin: ☐ Institution only ☒ **Discovery**

Set ID: -

Set Details Page (Logical Set)

- For the remaining steps, see [Managing Search Queries and Sets](#).

Support the Discovery of Alma KORMARC Records

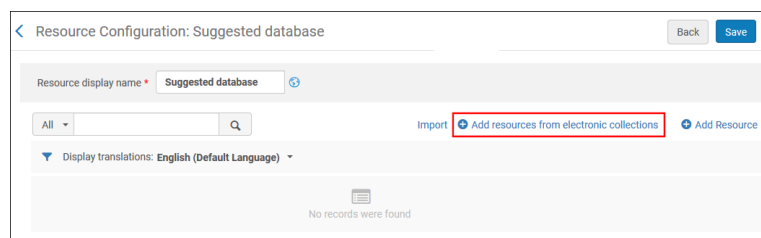
Primo VE now supports discovery for records that are cataloged in Alma in KORMARC format as it does for MARC 21 and Dublin Core. Records that are cataloged in KORMARC will be indexed for searching and/or displayed in Primo VE out of the box and do not require additional data loading or indexing.

Populate the Resource Recommender from Alma Electronic Collections

This enhancement allows you to add Alma electronic collections easily to the Resource Recommender (Suggested Databases type only) by searching for and selecting electronic collections from your repository. For each selection, the system will automatically configure the following fields to create a suggested database recommendation, which can be edited later:

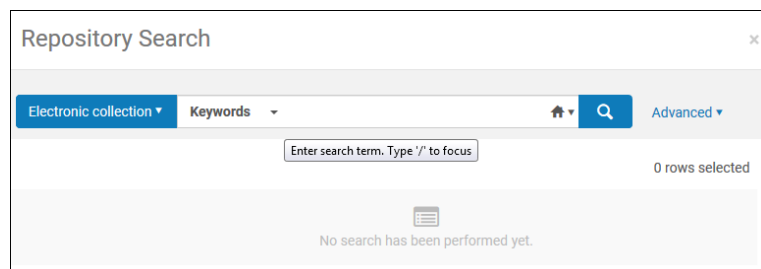
- **Name** and **Tags** - These fields are automatically populated with the selection's database name.
- **Link** - This field is automatically populated with the value of the selection's **UResolver Electronic collection URL** field.

To support this functionality, the **Add resources from electronic collections** option has been added to the Resource Configuration - Suggested Database page (**Configuration Menu > Discovery > Other > Resource Recommender Configuration**):



Add Resources from Electronic Collections - Resource Configuration Page

After this option is selected, you can search for and select one or more electronic collections, which are added to the recommendation list. For more details, see [Configuring the Resource Recommender Service for Primo VE](#).



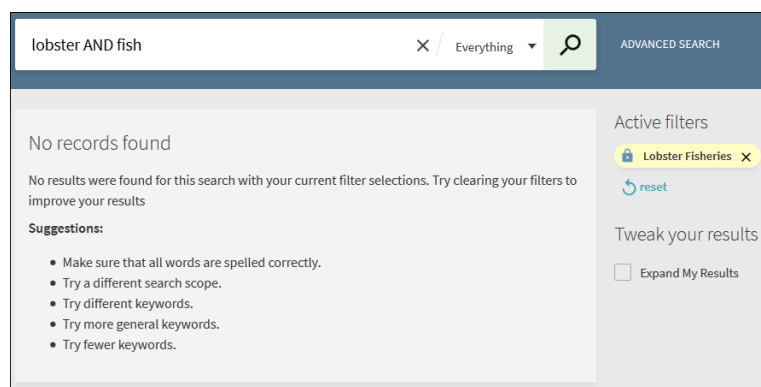
Searching for Electronic Resources

Improvements to the No Results Page

The results page has been enhanced to assist users by providing the following options when no results are returned from a search query:

- Display the **Expand My Results** option to allow users find collections to which the library does not have a subscription.

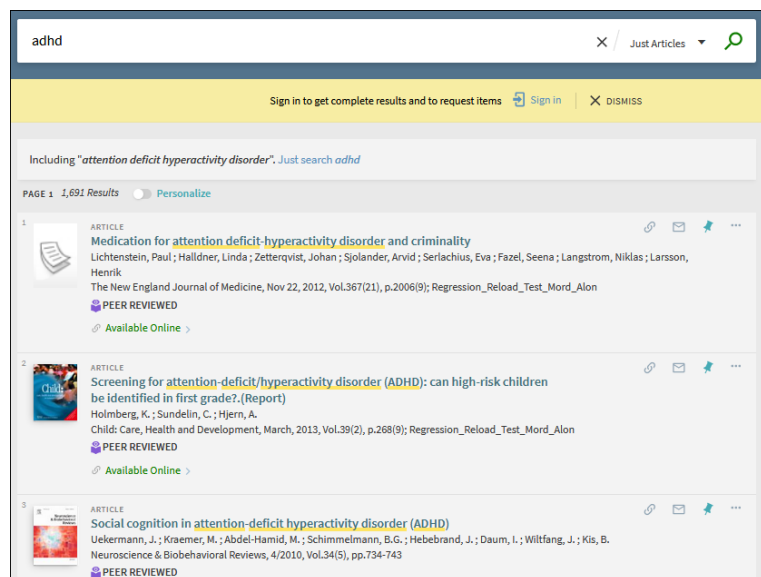
- Display any locked facets that may prevent users from getting results.



No Results Page

Highlight Expanded Terms in Results

With this release, we now highlight search terms coming from the expansion service (such as controlled vocabulary) in users' search results. For example, the system will highlight the search term **ADHD** and also its expansion **attention deficit hyperactivity disorder**.



Highlighted Search Terms for Controlled Vocabulary

Ongoing Accessibility Improvements

With this release, we focused on improving product accessibility to make it comply with the standard of WCAG 2.0 AA level. With the consultation of an external accessibility company, we resolved more than 40 issues, which consisted of the following types of changes.

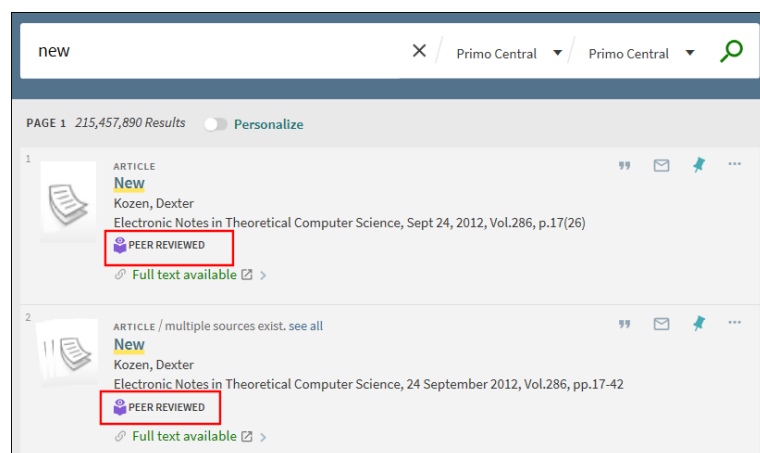
- WAI-ARIA markup corrections: Removed all of the unnecessary alternate text and unsupported ARIA label attributes that are not announced by the screen reader.
- Hierarchical page improvements: Ensured that a hierarchical heading structure was used on all pages and that there was consistent navigation throughout the site by using “skip to” links.

- Element focus corrections: Ensured that the focus was on the last interactive element upon opening and closing an object.

We are continuously working to improve the product's accessibility and adhere to the WCAG accessibility standards.

Peer Reviewed Icons for Articles

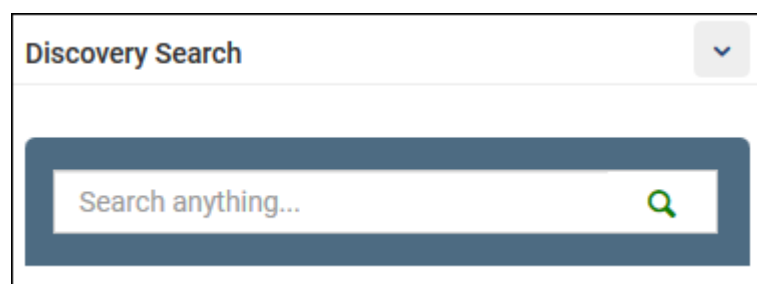
This enhancement increases the visibility and accessibility of peer-reviewed articles by replacing the text-only indication with a more visible icon.



Peer Reviewed Icons

Primo VE Search Widget for Alma Staff

This enhancement allows you to add a Primo VE search widget to Alma to allow staff users to search for items using Primo VE's search interface, which uses the default view defined on the View Configuration page ([Configuration Menu > Discovery > Display Configuration > Configure Views](#)).



Discovery Search Widget

Configuration Options

For Primo VE environments only, select the new **Discovery Search** option in the Manage Widgets dialog box to add the widget to the main page in Alma. For more information, see [Managing Widgets](#).

Manage Widgets		
Active	Widget name	Description
<input checked="" type="checkbox"/>	Tasks	Tasks Widget
<input checked="" type="checkbox"/>	Notifications	Notifications Widget
<input checked="" type="checkbox"/>	Organization Calendar	Calendar Widget
<input type="checkbox"/>	Scheduled Jobs Status	The Scheduled Jobs Status Dashboard widget presents the status of scheduled jobs for the last 5 days
<input checked="" type="checkbox"/>	Discovery Search	Primo Dashboard Widget
<input type="checkbox"/>	Consortia Member Links	Consortia Links Widget

Manage Widgets Dialog Box

Resolved Issues

The following issues were resolved in this release:

(URM-79457) Users who did not have permission to access resource sharing were unable to back out of the Resource Sharing page after clicking the ILL Request button in the main menu. This has been fixed.

(URM-80198) The Source format field on the Import Profile Details page does not indicate that it is required for Discovery import profiles. This has been fixed.

(URM-82026) After uploading a test file on the Testing Normalization of non-Alma Primo VE records page, the record did not display in the Source Record pane. This has been fixed.

(URM-82138) For cases in which the creator name contained apostrophes, the Author facet had incorrect capitalization and spacing. This has been fixed.

(URM-82275) Users were not receiving notifications for saved search alerts. This has been fixed.

(URM-82595) The Data Source code table ([Configuration Menu > Discovery > Display Configuration > Labels > Data Sources](#)) has been added to allow staff users to modify the display label of the data source in the UI.

(URM-83241) In some cases, no results were returned in Journal Search when the query had Chinese characters. This has been fixed.

(URM-83799) The needed by date for requests was being set to a date earlier than the date specified in the Primo VE request. This has been fixed.

(URM-83982) When EBSCO was configured to communicate via HTTPS only, results were not appearing in Primo VE. This has been fixed by using HTTPS to communicate with the EBSCO API.

(URM-85171) In some cases, links coming from Primo Central records were not using the defined proxy prefix. This has been fixed.

Next Month Sneak Peek

- Enhance consortia capabilities, which includes allowing patrons to see and request items in other institutions.
- Allow staff users to subscribe to Primo VE analytics reports.
- Configuration to define how Primo VE should treat Chinese character searches (tokenization or character by character).