

Primo VE November 2018 Release Notes

Features

Normalization of Display Fields and Local Display Fields

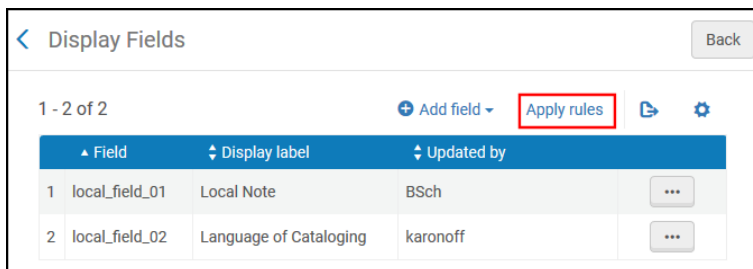
November 2018

This enhancement allows you to create MARC21 normalization rules, which allow you to alter the presentation of the out-of-the-box display fields and any local display fields that you have created in Primo VE. The normalization rules are applied immediately to the records for discovery.

Configuration Options

To support this functionality, the following changes have been made:

- The name of the Local Fields page has been changed to Display Fields.



Display Fields Page

- The Display Fields page is accessed by selecting **Configuration Menu > Discovery > Manage display and local fields**.
- The **Apply rules** option has been added to the Display Fields page to apply changes to all updated normalization rules.
- The following changes have been made to the Define a Local Field page:
 - It is now accessed by selecting **Add field > Add local field** on the Display Fields page.
 - The configuration fields from the previous version of the page have been moved to a new tab called **Bibliographic Local Field Mapping**.
 - The **Normalization Rules (for display)** tab has been added to allow you to add normalization rules for the display of local fields. For more information on how to add MARC21 normalization rules for Primo VE, see [Configuring Normalization Rules for Display and Local Fields](#).

Define a Local Field

Field to edit: local_field_01 Display label: [empty]

Bibliographic Local Field Mapping Normalization Rules (for display)

Marc21 Normalization Rule

Normalization rule	Updated by	Updated date
1 Marc21 normalization rule	-	-

Define a Local Field Page (Modified)

- When editing a normalization rule for a local display field, Primo VE provides a normalization template to assist in the creation of the field's normalization rule. You have the option to save your changes (**Save**), cancel changes to current session (**Close**), or restore the default template (**Restore Default**).

Normalization rule for local_field_03

```
rule "Primo VE - Lds03"
  when
    MARC is "XXX"
  then
    create pnx:display: "lds03" with MARC "XXX"
  end
```

Restore Default

Close Save

Edit Normalization Rule Dialog Box for Local Display Field

- The Define a Display Field page has been added to allow you to add normalization rules for display fields (such as Creator and Contributor).
 - This page is accessed by selecting **Add field > Add display field** on the Display Fields page. For more information on how to add MARC21 normalization rules for Primo VE, see [Configuring Normalization Rules for Display and Local Fields](#).

Define a display Field

Field to edit: Creator

Marc21 Normalization Rule

Normalization rule	Updated by	Updated date
1 Marc21 normalization rule	-	-

Define a Display Field Page (New)

- When editing a normalization rule for an out-of-the-box display field, Primo VE displays the out-of-the-box normalization rule, which can be modified as needed. You have the option to save your changes (**Save**), cancel changes to current session (**Close**), or restore the out-of-the-box rule (**Restore Default**).

Normalization rule for Edition

```

rule "Primo VE - Complete Edition 250"
when
  MARC:"250" has any "3,a,b"
then
  create pnx:"display"."edition" with MARC:"250" sub without sort "3,a,b"
end

rule "Primo VE - Complete Edition 880-250"
when
  MARC:"880" has any "3,a,b" AND
  MARC:"880"."6" match "250-.*"
then
  create pnx:"display"."edition" with MARC:"880" sub without sort "3,a,b"
end

```

Restore Default

Close Save

Edit Normalization Rule Dialog Box for Edition Field

Browse Databases by Category

November 2018

The Database Search page has been enhanced to allow users to display a list of databases by clicking specific categories and subcategories up to three levels.

The screenshot shows the Database Search interface. At the top, there's a search bar with the placeholder text "Enter database name" and a magnifying glass icon. Below the search bar, on the left, is a sidebar titled "Databases by category". It lists several categories: Agriculture and Food Sciences, Agriculture, Food Science, Education, Engineering, and Law. The "Agriculture and Food Sciences" category is expanded, showing subcategories. On the right, there's a section titled "Search for databases" with the text "To search for databases you can do the following:" and two bullet points: "Enter keywords in the search box." and "Browse databases by category."

Categories in Database Search

When the Database Search page opens, the categories display the first category level only. Users can select the



icon to display the category's next level.

Assigning Categories to the Database Records

This feature requires you to apply database categories, which can contain up to three category levels, to the bibliographic records of your local databases.

To assign categories to your local database records:

1. Choose a local bibliographic field (for example, select any 6XX or 9XX field for MARC21) in which to store the database categories in your local bibliographic records, and then enter that field in the **db_categories_field** parameter on the Alma Customer Parameters page (**Configuration Menu > Resources > General > Other Settings**).

Note

Administrators will need one of the following roles to update the above parameter:

-
- Catalog Administrator
 - Repository Administrator
 - General System Administrator
-

2. For each local database, use the Metadata Editor (**Resources > Cataloging > Open Metadata Editor**) to add the chosen MARC field with the following subfields to assign up to three category levels: \$\$a (level 1), \$\$b (level 2), and \$\$c (level 3). For example:

```
699 ##$aEducation $bMedical $cFitness
699 ##$aEducation $bHealth
```

Note

As shown in the example above, a database can belong to more than one category/subcategory.

3. Enable the **Creates DB Categories File** job (**Admin > Monitor Jobs > Scheduled tab**) under the **Discovery** filter to update the record's categories for discovery in Primo VE. This job is scheduled to run daily.

Customizing the Display Labels

The following codes have been added to the Database Search Labels code table (**Configuration Menu > Discovery > Display Configuration > Label**) to support the new display text on the Database Search page:

Code	Description
dbcategories.databases	Search for databases
dbcategories.description	To search for databases you can do the following:
dbcategories.option1	Enter keywords in the search box.
dbcategories.option3	Browse databases by category.
dbcategories.results	databases found for
dbcategories.title	Databases by category

Creating Translations for Categories

In addition to the labels that appear on Database Search page, the Database Search Labels code table allows you to translate your categories to other languages.

When creating a translation for a category, make sure that the code name is the same as the English translation (which is the default translation) of the category and that all spaces in the category are changed to an underscore (_). For example, if your category is **Medicine & Technology**, the value of the translation's **Code** field should be **dbcategories.Medicine_&_Technology**.

Code Table

Database Search Labels

Table code	DatabaseSearchLabels	Table Description	Database Search Labels
Patron Facing	No		
Customization mode:	Entire table needs to be customized		

Filter: English

Enabled	Move Up	Move Down	Code	Description	Translation
1	<input type="checkbox"/>		nui.databasesearch.title	Database Search	Database Search
2	<input type="checkbox"/>	▲	nui.databasesearch.searchbox.help	Enter database name	Enter database name
3	<input type="checkbox"/>	▲	dbcategories.title	Databases by category	Databases by category
4	<input type="checkbox"/>	▲	dbcategories.databases	Search for databases	Search for databases
5	<input type="checkbox"/>	▲	dbcategories.results	databases found for	databases found for
6	<input type="checkbox"/>	▲	dbcategories.option1	Enter keywords in the search box.	Enter keywords in the search box.
7	<input type="checkbox"/>	▲	dbcategories.option2	Click on a letter above.	Click on a letter above.
8	<input type="checkbox"/>	▲	dbcategories.option3	Browse databases by category.	Browse databases by category.
9	<input type="checkbox"/>	▲	dbcategories.description	To search for databases you can do the following:	To search for databases you can do the following:
10	<input type="checkbox"/>	▲	dbcategories.Medicine_&_Technology	Medicine & Technology	Medicine & Technology

Default English Translation for Category

To add a translation for another language (such as Spanish), select **Spanish** from the **Language** filter drop-down list and enter the category's translation in the **Translation** field. The **Description** field for all languages should contain the default English translation of the category.

Code Table

Database Search Labels

Table code	DatabaseSearchLabels	Table Description	Database Search Labels
Patron Facing	No		
Customization mode:	Entire table needs to be customized		

Filter: Spanish

Enabled	Move Up	Move Down	Code	Description	Translation
1	<input type="checkbox"/>		nui.databasesearch.title	Database Search	Búsqueda de base de datos
2	<input type="checkbox"/>	▲	nui.databasesearch.searchbox.help	Enter database name	Introducir nombre de la base de datos
3	<input type="checkbox"/>	▲	dbcategories.title	Databases by category	Databases by category
4	<input type="checkbox"/>	▲	dbcategories.databases	Search for databases	Search for databases
5	<input type="checkbox"/>	▲	dbcategories.results	databases found for	databases found for
6	<input type="checkbox"/>	▲	dbcategories.option1	Enter keywords in the search box.	Enter keywords in the search box.
7	<input type="checkbox"/>	▲	dbcategories.option2	Click on a letter above.	Click on a letter above.
8	<input type="checkbox"/>	▲	dbcategories.option3	Browse databases by category.	Browse databases by category.
9	<input type="checkbox"/>	▲	dbcategories.description	To search for databases you can do the following:	To search for databases you can do the following:
10	<input type="checkbox"/>	▲	dbcategories.Medicine_&_Technology	Medicine & Technology	Medicina y Tecnología

Spanish Translation for Category

Direct Linking from Brief Results

November 2018

This enhancement uses existing Alma configuration to enable direct linking for online records. When direct linking is enabled, users are directed to the full text after selecting the record's availability status in the brief results. Otherwise, the user is directed to the full display of the record, where access to the record's full text is provided in the View It section.



Availability Status for Online Record

For details on configuring direct linking, see [Enabling Direct Linking for Primo VE](#).

Direct Linking Configuration Page

Additional API Support

November 2018

Primo VE now supports the following APIs:

- Primo User JWT – Returns a token that allows you to perform searches for restricted material and to display information for a specific user's My Favorites.
- Primo Configuration – Returns view, institution, and general configuration information that is associated with the specified view.

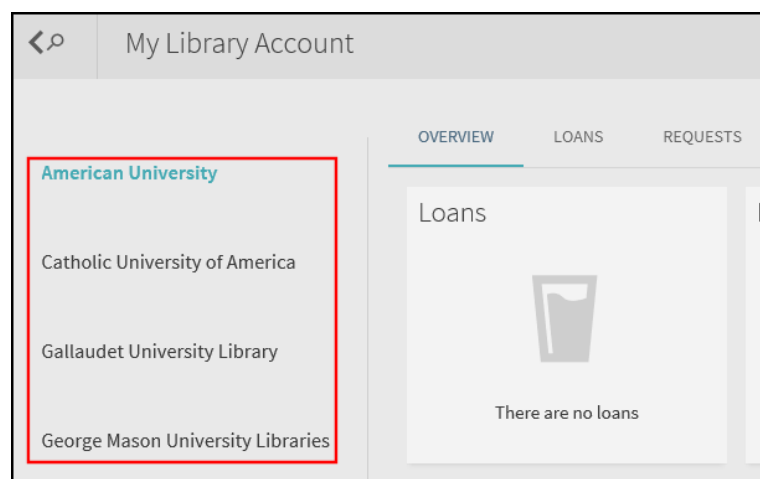
- Primo Translations – Returns the translations for all code labels based on a specified language.
- Primo Favorites – Returns information from the user's My Favorites. This API requires you to get a token using the Primo User JWT API.

For more details on each API, see [Ex Libris Developer Network](#).

Improved Display of Institutions in My Library Card

November 2018

In multi-institution networks, users are permitted to perform requests for specific institutions. Previously, users had difficulty locating the Location drop-down menu that allows users to display request information per institution in My Library Card. This enhancement allows users to easily switch between institutions to see relevant information by clicking an institution name from the page's left panel.

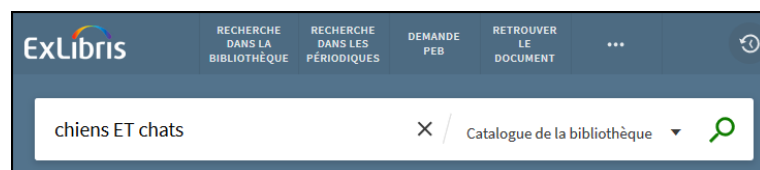


Institution Panel in My Library Card

Boolean Operators for Additional Languages

November 2018

For searches in English, the Boolean operators (AND, OR, and NOT) allow users to create more complex search queries in both basic and advanced searches. This enhancement adds the Boolean Operator mapping table, which allows you to configure these operators for other languages. For more information, see [Configuring Boolean Operators for Primo VE](#).



French Boolean Operator for AND in Basic Search

Note

That Boolean operators must be all capital letters.

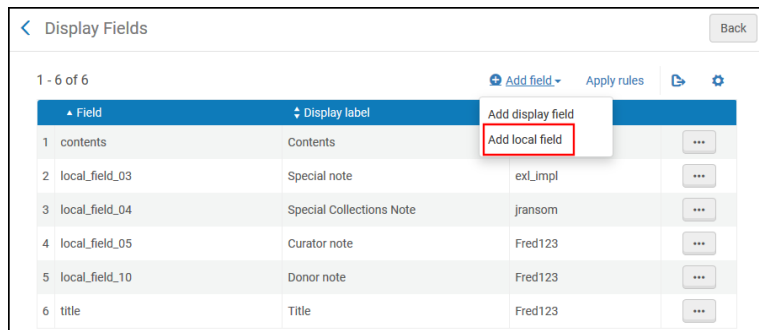
Support Translations for Local Facet and Display Values

November 2018

This enhancement allows you to define and use translations for local facet/display field values. If no translation is provided, Primo VE will display the value provided by the source record.

To support this functionality, the following changes have been made:

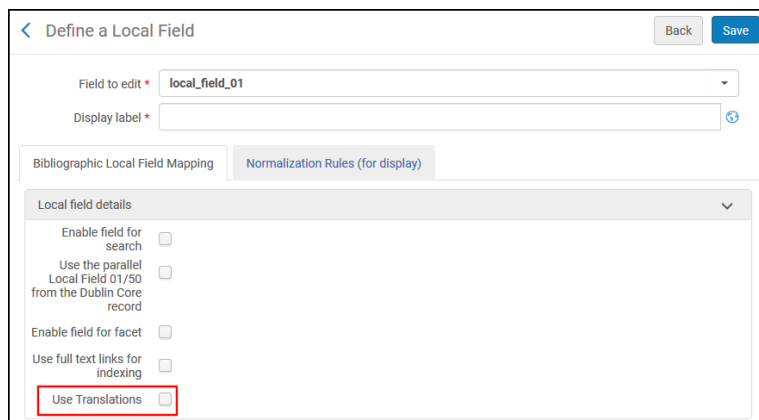
- The Local Fields page (**Configuration Menu > Discovery > Display Configuration > Manage Local Fields**) has been removed and its functionality is now handled by the Display Fields page (**Configuration Menu > Discovery > Display Configuration > Manage Display Fields**). To open the Define a Local Field page, you must select **Add local field** from the **Add Field** drop-down list:



Field	Display label	Add display field	
1 contents	Contents	Add display field Add local field	...
2 local_field_03	Special note	ex_impl	...
3 local_field_04	Special Collections Note	jransom	...
4 local_field_05	Curator note	Fred123	...
5 local_field_10	Donor note	Fred123	...
6 title	Title	Fred123	...

Accessing the Define a Local Field Page

- The **Use Translations** option has been added to the Define a Local Field page (**Configuration Menu > Discovery > Display Configuration > Manage Display Fields**) to allow you to configure whether a local facet or display field contains translations for the local field's values.



Field to edit: local_field_01

Display label:

Bibliographic Local Field Mapping | Normalization Rules (for display)

Local field details

Enable field for search ☐

Use the parallel Local Field 01/50 from the Dublin Core record ☐

Enable field for facet ☐

Use full text links for indexing ☐

Use Translations ☒

New Use Translations Option

- The Local Field Translate code table has been added to define the values for the local facet and display values. If the **Use Translations** option is selected for a field and a corresponding value is not defined, Primo VE will display the value supplied in the source record. For each mapping row, use the value of the mapped subfield. For example, if you are mapping the MARC 907 \$\$a subfield to a local field, you would create a code for each value and modify the **Translation** field as needed per language:

Mapping:

907 \$a 610medicineAndHealth

Code :

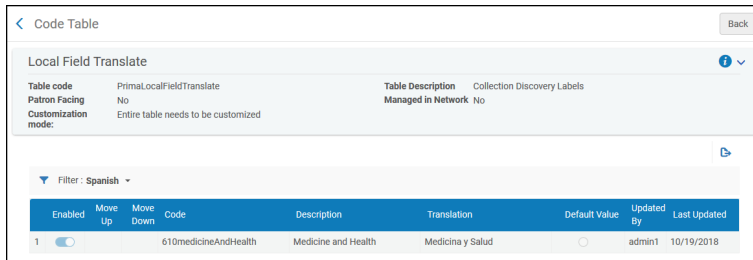
610medicineAndHealth

Description (English) :

Medicine and Health

Translation (Spanish) :

Medicina y Salud



Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated
1			610medicineAndHealth	Medicine and Health	Medicina y Salud		admin1	10/19/2018

Local Field Translate Code Table

UNIMARC Improvements

November 2018

The following issues have been resolved to improve the normalization and display of UNIMARC records in Primo VE:

1. For the UNIMARC 011 field, Primo VE now displays the ISSN label for the \$\$a subfield in the record's full display.
2. The UNIMARC 205 field has been added to the Brief Record Display.

Japanese Index and Search

November 2018

To support Japanese searches, the following areas are now supported:

- **Indexing:**
 - 1-gram
 - Normalization of special characters (based on mapping)
 - Variant Kanji
 - Hirigana - Katakana
 - Half-width
 - Full width
 - Punctuation marks are removed
- **Search:**

- BASIS to tokenize the search query
- Search for each token as a phrase
- Normalization (based on mapping)

For example:

ABCD, which composes the words AB & CD, would be indexed as A_B_C_D and searched as “A_B” AND “C_D” (and not ‘char by char’).

- **Sort:**

Ranking is based on Basis tokens:

- With exact match first
- According to field weight

Resolved Issues

- **November 2018 SF: 00510447, 00585684, 00585722, 00565550, 00589525, 00542282, 00551893, 00570917, 00572611**
In some cases, Primo Central records contained links to physical items that were unrelated to the title. This has been fixed.
- **November 2018 SF: 00507627, 00522383, 00584638**
Enabling login restrictions is Alma blocked staff from accessing Primo VE. This has been fixed.
- **November 2018 SF: 00587580, 00588377**
Display fields on the Request/Digitization forms could not be customized. This has been fixed.
- **November 2018 SF: 00526046**
In some cases, the **Issued With** display constant displayed when it should not have for the record. This has been fixed.
- **November 2018 SF: 00564026, 00585151, 00582380, 00591770**
Display labels for View It were not displaying correct translations. This has been fixed.
- **November 2018 SF: 00539689, 00540358, 00551592, 00561095, 00579216, 00580156, 00591147**
Exact titles were not given precedence in Journal searches. This has been fixed.
- **November 2018 SF: 00533492**
In some cases, license information was not displayed in View It. This has been fixed.
- **November 2018 SF: 00588015**
The place of publication can now be added to the brief and full views using View Configuration.
- **November 2018 SF: 00541649, 00585588**
Local fields were duplicated on the Configuration Menu > Discovery > Manage Local Fields page. This has been fixed.
- **November 2018 SF: 00563250, 00570574**
The values in the Locations facet are not displaying the correct physical location names according to the interface language. This has been fixed.
- **November 2018 SF: 00563139**
Language drop-down list in Advanced Search does not display languages based selected interface language. This has been fixed.
- **November 2018 SF: 00573955**
The value of the 77X/78X \$\$9 subfield displayed in the details. These display mappings have been removed.
- **November 2018 SF: 00511100**
The Collection path displayed more than once in the record's full display. This has been fixed.

- **November 2018 SF: 00571319**
In some cases, search profiles could not be added to a slot. This has been fixed.
 - **November 2018 SF: 00546146**
In some cases, angle brackets displayed in the record's full display and facets search. This has been fixed.
 - **November 2018 SF: 00587124**
In some cases, the creation date was calculated incorrectly for facets. This has been fixed.
 - **November 2018 SF: 00590672**
The filtering of items in Get It did not work for languages other than English. This has been fixed.
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Next Month Sneak Peek

- **November 2018**
Support Silent Login.
- **November 2018**
Inserting Hebrew Core (Melingo).
- **November 2018**
For consortia, support the creation of search scopes on other institutions/libraries in IZ.