Primo Quarterly Update

2019 Q3 - Primo Product Team
Highlights

Discovery in Context:
Show More Items from the Same Course or the Same Collection

Display reason for Non-renewable Loans in My Library Card

Support Exact Search of Hypertext Links

Improve Glanceability of Course Material in Search Results

Support More Exact Search for Hypertext Links

Primo VE Updates
Primo Release Schedule

Upcoming release for Primo

- **July 21st**: Sandbox Release
  - Primo MT Sandbox

- **July 28th**: Primo TC

- **August 4th**: Production Release
  - Primo MT Production

- **August 18th**: Primo Local
  - Primo General Release available for customers on the FTP server

**News:** Primo Quarterly Release Schedule – 2020 is published in the CKC
Primo VE Release Schedule

Upcoming release for Primo VE

- **July 21st**: August Sandbox Release
- **August 4th**: August Production Release
- **August 18th**: September Sandbox Release
- **September 1st**: September Production Release

*The schedule is in sync with the Alma monthly release cycle*
Discovery in Context with Curated Relations

- More ways to expose curated relations in Primo e.g.
  - Course’s items
  - Collection’s items
- Show the patron more items from the same collection or from the same course in a record’s full display
Discovery in Context with Curated Relations

Show More Items from the Same Collection
Show More Items from the Same Collection

• For customers with Collection Discovery activated
• In a record’s Full Display
  • Primo checks if the record is associated to one or more collections
  • If so, it hints the patron with the new Service named “Collection”
  • More from the Same Collection
    • Show a list of collections for this record, each one as a link to a Collection Page
    • Show a mix of other items associated to the same collections (Primo triggers a search for items with the same collection parent id)
Discovery in Context with Curated Relations

Show More Items from the Same Course
Show More Items from the Same Course

- For customers with course material in Primo

- In a record’s Full Display
  - Primo checks if the record has course information in the PNX
  - If so, it hints the patron with the new Service named “Course”
  - More from the Same Course
    - Show a list of courses that current record is part
    - For Leganto customers – each course name can be a link to its Reading list in Leganto
    - Show a mix of other items from same courses (Primo triggers a search for items with the same course codes)

- Rollout:
  - Update Normalization Rules with course information + Re-index relevant data
Improve Glanceability of Course Material in Search Results

• Display Course icon for records that are part of a course in the brief results and in the record’s Full Display
Maximize your Discovery Capabilities to Expose Course Material

- Help user to find course material more easily in discovery
- Expose more course items in the right context
- Provide access to Leganto’s Reading Lists from your discovery
My Library Card: Display Reason for Non-renewable Loans

• Add an indication that a loan is not renewable

* NERS ID 5493 - Coming from Idea Exchange
My Library Card: Display Reason for Non-renewable Loans

• If reasons are provided by Alma, users can display a maximum two reasons by hovering their cursors over an item.
Support More Exact Search for Hypertext Links

• Previously when clicking on Hypertext link, Primo matches results as exact phrase (when defining Search Operator “exact” in Hypertext Linking Definitions)

• For example the link on author “Williams, John” retrieves also results with the Williams, John” and more
  • Williams, John, -1750
  • Williams, John -1791

* Completion of NERS 5387
Support More Exact Search for Hypertext Links

- Now Primo provides an option to search with relevant facet to support exact match
Support Exact Search of Hypertext Links

• New Search Operator “facet exact” can be defined per relevant field

• Note: When selecting “facet exact” there should correlation between Hypertext link value ($$Q or value itself) to the facet value (same normalization rules should be applied for both values for better matching.)
Export to Mendeley

- Adding optional action send items to Mendeley reference manager

* Coming from Ideas Exchange
Export to Mendeley

• Requires registration of your Primo Institution - use application IDs in your Primo admin

• Clicking on Mendeley prompts user to connect to their Mendeley accounts (valid for an hour per Mendeley timeout)

• Support Export to Mendeley for a single record or for a bulk of records from My Favorite

• Provides user feedback once exported succeeded
Search Engine Optimization (SEO) Friendliness

Apply the following SEO best practices as part of the ongoing effort to make your Library Catalogue visible on the web:

1. Canonical URL:
   - Adding Canonical URL informs search engines that certain similar URLs are actually one and the same
   - The tag rel=canonical was added in the head section using following URL structure:
     
     http://<DNS>/primo-explore/fulldisplay/Lang_Auto68586/weston
   - This was added to Primo’s Full Record Display

2. Adding Schema.org on record’s Full Display
   - Changing the calculation of the schem.org object to be done for each full view access
Search Engine Optimization (SEO) Friendliness

3. Adding to Primo Collection Lobby and Collection Page:
   - Document Title element
   - Meta description element
More Updates

Additional notable items

• Manage your customization labels in one place
• Customize Primo shortcut icon in IOS/Android
  • home-screen-icon.png

Ongoing improvements

• Primo Analytics
Primo VE Updates

- Additions in Normalization of Local Search and Facets
- Library Card Related Features
- Results Ranking Configuration
- Consortia Related Features
- Blank Patron Purchase Request Form
- Take Advantage of the Platform
Additions in Normalization of Local Search and Facets

New additions are available in normalization rules of local search and facets:

- **Test Tool** – an ability to test the normalization rule on Alma record

- Supporting **UNIMARC** format

* Also coming from [Idea Exchange](#)
Configuration of Display Loan Items in My Library Card

Control the presentation of brief and full display of loan items in My Library Card

• **Brief display of loan items:**
  • Define the loan parameters in the second line of brief display
  ![Example of loan parameters in brief display]

• Configure up to three parameters per field and the delimiter

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Configuration of Display Loan Items in My Library Card

• **Full display of the Loan items:**
  
  • Specify which fields will appear in the loan's full display

  ![Loan Item Display](image)

  • Enable the relevant fields and define the order in which they will appear

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Results Ranking Configuration

• Primo VE aims to give the users the most relevant results first

• In addition to our effort to rank the most relevant results, Primo VE now provides the flexibility to control of how you want to rank your own local materials.

• Boost configuration is applied in search time. You can immediately see the results of a change and decide if it is been for the better.

* Coming from Idea Exchange
Results Ranking Configuration

- You can define the ranking based on three criteria:

  **Field Boosting** – you can set a different Boosting Factor for each field. This defined Boosting Factor is multiplied for every match found in that field.

  ![Field Boosting Table]

  **Date Boosting** – you can display the most recent and up-to-date documents first. Configuration of Date Boosting can be for a specific year or boosting range of years.

  ![Date Boosting Table]
Results Ranking Configuration

Resource Type Boosting – Allow you to promote local collections owned by the library and give them high boost based on their resource type.

- Date and Resource Type boosting are affected the *document boost*. Their influence on the search result is much more significant, comparing to the field boost which is *query boost* and its affect is less noticeable.
Exclude External Data Source from Entire Network Search

• Allows institution in a consortia to exclude its external data source from Entire network search

• External data records will not be retrieved in other institution’s search when it is defined as unshared
Consortial Union View

- Consortia can create a ‘Neutral’ view to publicize the materials held by all the institutions in the consortia
- This view can be created in the Network institution:

![Define View](image)

- For unknown users (Guest), primo VE offers services that activated in consortia level (e.g. electronic or GES services)
- As soon as the user signs in to a specific institution, the available services of this institution are offered to the user
Consortial Union View - Flow
Blank Patron Purchase Request Form

- Allows users to submit purchase request for item that doesn’t exist in the library catalog
- Direct link in Links Menu to the new Purchase Request form
- Available for signed-in users. Guest users are requested to sign in first in order to submit a request.
Take Advantage of the Platform

Browse by call number

New browse call number types are available: UDC, NLM and shelving control number.
Search Response Time Improvements

- Significant improvements are encountered in search and Get It response times after rolling out several improvements during June-July.
- Monitoring the performance on a daily basis and at the institutional level.
- As part of our continuous effort, additional improvements will be rolled out in future releases.

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Sneak Peek for 2019 Q4

- Apply Actions on Bulk of Records in Brief Results
- Support Search by Voice
- Improve Email Template and Support Customization
- Support Display of Subject Chains in a record Full Display
- Browse Journals by Category
- Include Electronic Materials in Virtual Browse
  Primo VE
Thank you!

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