

Primo August 2020 Release Notes

Upcoming Issues to Note

The OBI that is used with Primo Analytics will be upgraded to OAS (Oracle Analytics Server) and <u>rolled out in Q4 2020</u>. For more details on the migration of reports, see <u>Primo OAS (Oracle Analytics Server) Rollout</u>. Note that Data Visualization (DV) is currently in preview mode and is not planned for Primo Analytics at this stage.

November Sneak Peek

- Configure the FRBR Preferred Record Allow customers to give preference to newer records (NERS).
- Utilize Mobile Device Capabilities Add a QR code for a permalink to any search or results page.
- Primo Analytics Add option to share Primo Analytics reports by sending them to an FTP server.
- Ongoing Accessibility Improvements Based on external audit.

Features

New Action - Export to Excel

August 2020 - NERS Enhancement (ID #6190)

The new **Export to Excel** action allows users to download information (which includes all enabled display fields and a permalink) for one or more records to a .csv or .xlsx file.

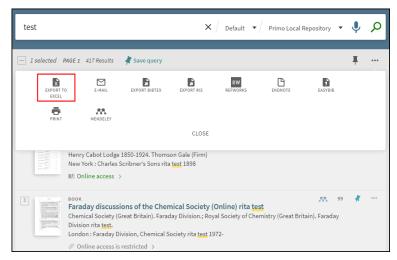
Title, Creator, Is Part Of, Subject, MESH subjects, Genre, Contents, Other title, Related titles, Series, Publisher, Creation Date, Edition, Format, Source, Identifier, Donation Info, Audience, Course Information, Permalink

Dinner illustrated: 175 meals ready in 1 hour or less, "America's Test Kitchen (Firm), editor. ", Dinner and dining; Quick and easy cooking; Cookbooks; COOKING / Courses & Dishes / General; COOKING / Methods / General; COOKING / Reference, ,, Includes index.,,, "Boston, MA: America's Test Kitchen", 2018, ,300 pages cm, Library Catalog, LC: 2017055764; ISBN: 9781945256301 (paperback),,,,https://sqa-na01.alma.exlibrisgroup.com/permalink/PRIMO_OAP_INST/1kh011t/alma99221941300496

A Single Record Saved to a CSV File

This action is supported in the following areas of the UI:

Brief Results page – Users can either export a single record or select and export one to 50 records in bulk to a file.



Export to Excel Action on the Brief Results Page (Bulk Selection)

- Full Display page Users can export the record to a file.
- My Favorites > Saved Records Users can either export a single record or select and export one or more records in bulk to a file.
- My Library Card > Loans and Requests In Alma environments only, users can either export a single record or select and export one or more records in bulk to a file.

After selecting the **Export to Excel** action in UI, users will have the option to download the results to a file using one of the following file types: .csv or .xlsx.



Select File Type to Download

Note

When using the CSV file type for non-Latin languages, we recommend that you use Notepad to open the file, but if you prefer to use Excel, make sure that you use UTF-8 encoding.

Configuration Options

The following table lists the configuration settings that are associated with this functionality.

Back Office Element	Description	
Actions List mapping table	The Excel mapping row has been added to allow you to enable the new Export to Excel action, set its position, and set whether it is a top-level action.	
	The following codes have been added to support the customization and translation of the associated labels in the UI:	
Keeping this item tile code table	default.fulldisplay.command.pushto.option.Excel: Export to Excel	
code table	• default.fulldisplay.command.pushto.option.Excel.FileType: File Type	
	default.nui.Excel.tooltip: Processing file	

Analytics - Export to Excel Action

To support this functionality, the following actions have been added to the Action Usage subject area:

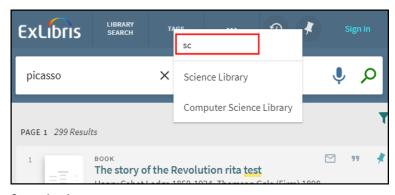
Group	Subgroup	Action	Description
Document	Actions	Excel export	The user has exported to Excel by selecting the Export to Excel action for a specific record.
Results List	Records Bulk	Send bulk of records to Excel	The user has exported results to Excel using the bulk file selection method.

Enhanced Personalization - Easy Selection of Recently Used Search Scopes

August 2020

The Scope drop-down list for basic searches has been modified as follows to allow users to find scopes quickly or to reuse recently selected scopes:

• The **Look-up or select** prompt has been added to the top of the Scope drop-down list. As users begin typing characters at the prompt, matching scopes will appear in the lower portion of the box for selection. Recently selected scopes will appear only once in the selection list.

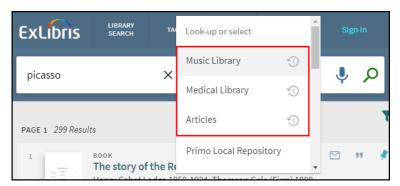


Scope Lookup

 The last three scopes that were recently used in a search appear just below the Look-up or select prompt and are indicated by the Recent icon



. For signed-in users only, the scopes for each search tab are retained between sessions.



Recently Used Scopes

Configuration Options

This capability is not enabled out of the box. The following table lists the configuration settings that are associated with this functionality.

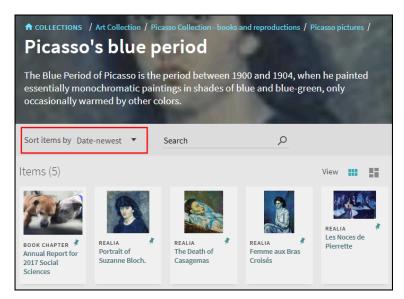
Option	Description
View Properties mapping table	To enable this feature, add the enable_recent_scopes property name to the View Properties mapping table (if it does not exist) and set its value to true .
Search Tile code table	The following code was added to support the new Look-up or select prompt: default.nui.searchLookup: Look-up or select
aria Labels code table	The following code was added to support accessibility for this functionality: default.nui.search.searchTabFilter: You can filter to a specific search tab by typing its name. Use the up arrow to get to the filtering field

Collection Discovery Enhancement - Add More Sort Options

August 2020

Since the launch of Collection Discovery, it is apparent that many customers configure their Collection Discovery pages to show only collections or items. With this in mind, we have added separate sort drop-down lists for sub-collections (**Sort sub-collections by**) and items (**Sort items by**). This allows users to independently sort sub-collections and items on a collection's discovery page. For sub-collections, users can sort by relevance and title only, and for items, users can sort by author, date (oldest and newest), relevance, and title. The default sort type is now configurable with top-level collections in Alma (see Configuration Options).

Only relevant sort drop-down lists will appear on the collection's discovery page. Since the collection has only items in the following example, the page displays only the **Sort items by** drop-down list for the listed items in the collection:



Sort Filters for Items Only

Note

If the collection contains both items and sub-collections, the page will display both **Sort by** drop-down lists to allow each section to be sorted independently.

Configuration Options

This functionality is enabled by default. The following table lists all configuration options associated with this functionality.

Option	Description							
Collection Resource Editor page in Alma	On the Discovery tab, you can set the default sort option in Collection Discovery by selecting one of the following options from the Sort titles by drop-down list under the Display section on the Discovery tab: Relevance , Title , Author , Date - oldest , or Date - newest . If no option is selected or the selection is not relevant to sub-collections, the default sort is Relevance for Collection Discovery in Primo VE.							
Collection Title Sorting Routing mapping table in Alma (Configuration	Advance table. Collection Table Descrip		guration > A				nfig mapping table in Prin	•
Menu > Fulfillment > Discovery	Enable	d Code	Name	Direction		Order		
Interface Display Logic > Collection	1	rank	Relevance	Ascending	-			
Titles Sorting Routine)	2	title	Title	Ascending	Ψ.	3		
	3	author	Author	Ascending	-	4		
	4	date	Date - newest	Descending	Ψ.	1		
	5	date2	Date - oldest	Ascending	¥	2		
	Collect	ion Title S	Sorting Rou	tine Ma	ppir	g Table	in Alma	

Option	Description			
Collection Discovery code table	This table allows you to customize and translate the labels associated with this functionality: • default.nui.colldiscovery.sortItemsBy: Sort items by • default.nui.colldiscovery.sortSubcollectionsBy: Sort sub-collections by The following codes were updated to allow for the display of the number of collections and sub-collections in Collection Discovery. If you have customized these codes, make sure that you add the placeholder. • default.nui.colldiscovery.collections.title: Collections ({1}) • default.nui.colldiscovery.subcollections.title: Sub-collections ({0}) The following codes are no longer in use: • default.nui.colldiscovery.lobby.no.collections: ({1}) collections • default.nui.colldiscovery.lobby.no.subcollections: ({1}) sub-collections • default.nui.colldiscovery.lobby.no.items: ({1}) items • default.nui.colldiscovery.sortby: Sort by Note The options for the Sort by filters are customized with the Sort Values Labels code table.			

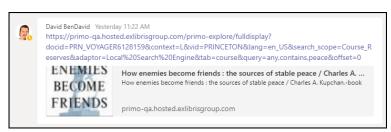
Search Engine Optimization: Add Metadata Tags to Improve Visibility on the Web

August 2020

This release includes the following changes to improve the visibility of Primo sites on the Web:

Added support for the following open graph meta tags (which are part of Facebook's Open Graph Protocol) in Primo
pages to control how their URLs are displayed when shared with social media sites: og:title, og:description, og:url,
og:type, and og:image. For example:

<meta id="ogTitle" property="og:title" content=""><meta id="ogDescription"
property="og:description" content=""><meta id="ogImage" property="og:image"
content=""><meta id="ogType" property="og:type" content="website"><meta id="ogURL"
property="og:url" content="">



Display of a Primo Record in Microsoft Teams

Note

This functionality is supported only for the full view of a record and not for any other Primo page.

 Added the ability to use the head meta tag to configure the description that appears for the main Primo pages in Web search results. For example:

```
<meta name="description" content="Access to My Library's services and resources, which
provided to support the teaching, learning, and research needs of our university.">
```

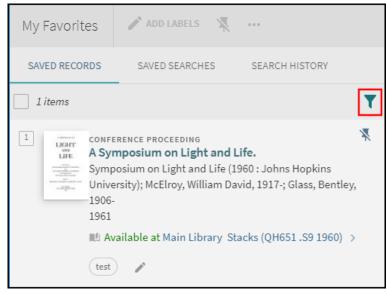
Customers can set this description per institution by modifying the following code in the Header/Footers Tiles code table:

default.main.description: Primo by Ex Libris

Mobile Device Usability Improvements to My Favorites

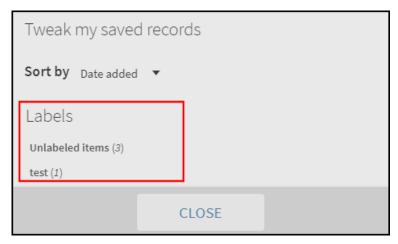
August 2020

A Filter icon has been added to the Saved Records tab in My Favorites to allow users who are using mobile devices to sort and filter their saved searches by specific labels.



New Filter Icon for Mobile Devices

Selecting the Filter icon opens the Tweak my saved records page, which allows users to select/clear labels and to specify one of the following sort types: **Author**, **Date added**, or **Title**.



New Tweak My Saved Records Page for Mobile Devices

Configuration Options

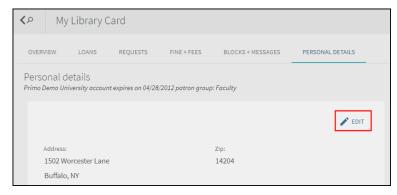
This capability is enabled out of the box. The following table lists additional configurations that are associated with this functionality.

Option	Description
Results Tile code table	The following code was added to support the new section for mobile devices: default.nui.sortAndlabels.title: Tweak my saved records
aria Labels code table	The following code was added to support accessibility for this functionality: default.nui.aria.sortAndlabels: Tweak my saved records

My Library Card: Disable Edit Option in Personal Details

August 2020

In many cases, borrower information comes directly from corporate systems and cannot be modified from within Primo. With this enhancement, the Edit option can now be hidden on the Personal Details tab in My Library Card since changes in Primo would have no effect in the corporate system.



Edit Button Enabled in My Library Card - Default Setting

Configuration Options

The Edit button on the Personal Details Tab in My Library Card is displayed out of the box. To hide the Edit button, add the **enable_edit_my_library_card** property name to the View Properties mapping table (**Primo Home > Advanced Configuration > All Mapping Tables**) and set its value to **false**.

Ongoing Accessibility Improvements (August)

August 2020

We are continuously working to improve product accessibility to make it comply with the standard of WCAG 2.0 AA level. In this release, we have resolved the following issues:

- Added the following ARIA label to the aria Labels code table, which was missing for the Primo Search Box: default.nui.aria.search.searchField.
- The ARIA label for the Saved Search Alert button was the same for both active and inactive states. This has been fixed by providing a code for each state in the aria Labels code table:
 - default.nui.aria.savedQueriesList.alert: Set alert for this saved search
 - default.nui.aria.savedQueriesList.unset.alert: Unset alert for this saved search

Ongoing Primo Analytics Improvements (August)

August 2020

Improved the following issues with the Primo Zero Result Searches Report in Primo Analytics:

- False zero results In some cases, no results were sent for a search query that did have results..
- Missing zero results In some cases, users received no results in the UI, but the searches were not reported or listed in the report. In some cases, customers did not see any reporting of searches with no results.

The following table lists the new usage actions for features that were added in previous releases.

Group	Subgroup	Action	Description	
Document	General	Click on Icon	An icon in the brief results was selected by an end user.	
Exploration	Resource Recommender	Click on "See all suggested resources"	The See all suggested resources link was selected by an end user.	

Additional Enhancements

August 2020

Primo now supports Irish as an Interface language.

August 2020

When exporting Primo records to RefWorks, the system now opens RefWorks in the same browser tab. Due to limitations with IE and Edge, the export still opens in a new tab.

Resolved Issues

- August 2020 SF: 511077, 514910, 694287, 730756, 732253, 739020, 739727, 789075, 380170
 For the control/colldiscovery PNX field, \$\$I has been removed from rules #2,4,7,9,11,13 in the Alma MARC Template.
- August 2020

For CDI results, the ampersand character is now treated as a stop word in German records.

August 2020

The following details have been updated in the Alma MARC template:

- Existing rule: addata/isbn is pulled from 020\$a if not exists 776 \$z and if INT \$a = 'E'
- Existing rule: addata/isbn is pulled from 776\$z if exists 020 \$a and if INT \$a = 'E'
- New rule: addata/isbn is pulled from 020\$a
 if INT \$a = 'P' OR 'D' OR 'C'
- Existing rule: addata/eisbn is pulled from 020\$a if exists 776 \$z and if INT \$a = 'E'
- New rule: addata/eisbn is pulled from 776 \$z
 if INT \$a = 'P' OR 'D' OR 'C'
- Existing rule: addata/issn is pulled from 022\$a if not exists 776 \$x and IF INT \$a = 'E'
- Existing rule: addata/issn is pulled from 776\$x if exists 022 \$a and if INT \$a = 'E'
- New rule: adddata/issn is pulled from 022\$a
 if INT \$a = 'D' OR 'P OR 'C'
- Existing rule: addata/eissn is pulled from 022\$a if exists 776 \$x and if INT \$a = 'E'
- New rule: adddata/eissn is pulled from 776 \$x
 if INT \$a = 'D' OR 'P OR 'C'
- August 2020

Based on feedback from many customers, the following link rule has been changed:

If the library has access to at least one of the collections that use the link in the record, those collections will be given precedence over the collections that use OpenURL. Links that use a document ID will be given priority over metadata links.

To:

If the library has access to at least one of the collections that use the link in the record and that link is not for an open access item, those collections will be given precedence over the collections that use OpenURL. Links that use a document ID will be given priority over metadata links. If the "link in the record" collection is open access then the OpenURL link will be given precedence. For more information on linking rules, see <u>Linking and the Merged Record</u>.

August 2020 SF: 736779, 738667, 743724

The permalinks for older ScienceDirect records do not resolve or redirect to the desired article record in Primo. This has been fixed.

• August 2020 SF: 833353

DOI searches for coronavirus articles did not return results. This has been fixed.

August 2020 SF: 824819

Searching for a DOI as a keyword returned too many results in CDI. This has been fixed.

• August 2020 SF: 825313

Incorrect No Full text rights at first search, L2R link rule not invoked. This has been fixed.

August 2020 SF: 829542, 830947

In some cases, the "Limited results found" error message was returned while searching CDI. This has been fixed.

August 2020 SF: 351639

Title sorts were not ignoring definite and indefinite articles (the, a, and an). This has been fixed.

August 2020 SF: 848012

The **Online resource** top level facet appeared twice in some cases. This has been fixed.

• August 2020 SF: 160885

Email record links showed restricted records to guest users. This has been fixed.

August 2020 SF: 190196

Admin users were able to access and make changes to some Installation-level menus. This has been fixed.

• August 2020 SF: 394999

In the new UI long list of authors were not truncated in the brief and full displays (including mobile devices). This has been fixed in the brief display only.

August 2020 SF: 514635, 529643, 650566, 823155, 378003

After selecting the 'return' keyboard button or 'Magnifying Glass' keyboard button on some mobile devices, the keyboard was still displayed. This has been fixed.

August 2020 SF: 633715, 657879, 671767

Unable to search for labels in My Favorites on mobile devices. This has been fixed. For more information, see <u>Allow Mobile Devices to Search for Labels in My Favorites</u>.

August 2020 SF: 461670, 524999, 427699, 552627, 477498, 635415, 687695, 552440, 661867, 461671, 528297, 723550, 641662, 481745

The Zero Search Results report in Primo Analytics contained searches that had results. This has been fixed.

August 2020 SF: 447154

Refreshing a record's full display after being found with Browse Search, left an empty search box and no way to return to the Browse results. This has been fixed.

August 2020 SF: 562953, 567853, 606473, 397997

Messages on the No Results page did not support the display of the search term. This has been fixed by allowing the following codes to support the use of the "term" placeholder in the code table:

- -nui.noresults.title
- -nui.noresultswithfilter.description
- -nui.noresults.description

- nui.noresults.suggestions
- nui.noresults.suggestion1 nui.noresults.suggestion5

Note: out of the box, the description for the codes will not change, but each will allow you to include a "term" placeholder.

August 2020 SF: 476766

In the new UI the loans list was limited to 10 items on some mobile devices. This has been fixed.

August 2020 SF: 500074, 391300

Translation codes from Collection Names table were not used for emails and print output. This has been fixed.

August 2020 SF: 504059

While using JAWS in the new UI, the following message was returned after clearing a search: There are no matches available. This has been fixed.

August 2020 SF: 498674, 546528, 569087, 630365, 655699

In the new UI's Full display, text within the "location items" could not be highlighted by user due to click-induced expand/collapse. This has been fixed.

August 2020 SF: 664654, 709448, 713846, 724735

In some cases, Boolean parameters appeared in the Newspaper Search box. This has been fixed.

- August 2020 SF: 498658, 523266, 546294, 577417, 682170, 755621, 817457, 829284, 847290, 847301, 427699
 Zero Result Searches in the new UI were not reported to Primo Analytics. This has been fixed.
- August 2020 SF: 508999

In the search results, the buttons to add/remove current item from My Favorites did not reflect its correct state. This has been fixed.

August 2020 SF: 600767

Books from EBSCO API search did not display titles in Primo. This has been fixed.

August 2020 SF: 656029, 657993, 691171, 708976, 838559, 840114

Topic overview delivery was not using a proxy base prefix. This has been fixed.

August 2020 SF: 679888

Pre-filters were missing aria labels and could be recognized by screen readers. This has been fixed.

• August 2020 SF: 648226, 805438, 823549

Search results facets were not visible to screen readers. This has been fixed.

August 2020 SF: 680915

The {language_bibliographic} placeholder in ILS Adaptors Templates was not working for the new UI. This has been fixed.

• August 2020 SF: 691544

When using JAWS/NVDA, there was no indication that you were signed in to Primo. This has been fixed.

August 2020 SF: 646478, 670457

In the new UI, the DataBase brief results displayed only one description field. This has been fixed.

August 2020 SF: 698950

When using advanced searched in the new UI, the sort type changes to **Date-newest** after clicking **See all versions**, but it does not switch back to **Relevance** after performing a new search. This has been fixed.

August 2020 SF: 691609

The text for the Add to Favorites pin icon, did not correctly reflect whether the record had been added previously to My Favorites. This has been fixed.

• August 2020 SF: 683441

In some cases, question marks appeared in links from saved searches. This has been fixed.

August 2020 SF: 646478, 723557

After performing a Database Search in the new UI, the description appeared as a code in the results. This has been fixed.

• August 2020 SF: 687848

In some cases, the A - Z Journal list page did not load properly. This has been fixed.

August 2020 SF: 683167

In the new UI, autocomplete was not disabled while changing password/pin. This has been fixed.

• August 2020 SF: 692381

For mobile devices, the Tweak my results section appeared at the bottom of the Citation Path page. This has been fixed.

- August 2020 SF: 687733, 718177, 724521, 736840, 751462, 755573, 789403, 806979, 836629, 842123
 Find Online/Find in Library links led to wrong place in permalink records. This has been fixed.
- August 2020 SF: 735394

See Ongoing Accessibility Improvements (August).

August 2020 SF: 742619

In some cases, users with screen reader could not log out of Primo VE. This has been fixed.

August 2020 SF: 757288

In some cases, staff users with the View Manager role in the Primo Back Office could not customize FE code tables. This has been fixed.

August 2020 SF: 757327, 793988, 798355

For Voice Search, the tooltip did not display. This has been fixed.

August 2020 SF: 753873

In some cases titles were missing in saved search email alerts. This has been fixed.

August 2020 SF: 429850

Some terms were missing from the British American synonym files. This has been fixed.

August 2020 SF: 797164

[NEW] BIRT reports returned HTTP Error 400. This has been fixed.

• August 2020 SF: 714803

Unable to remove the Edit option from the My Library Card > Personal Details tab. This has been fixed. For more information, see <u>Disable Edit Option in My Library Card</u>.

August 2020 SF: 712072

In some cases, the analysis for zero results searches was not accurate because the other3 Beacon parameter contained the string '0' instead of the number 0. This has been fixed.

August 2020 SF: 794726

Security issues regarding CVE-2019-12418 have been addressed for Primo.

• August 2020 SF: 800829

Import Primo configuration to Sandbox failing on staff import - integrity constraint violated - child record found. This has been fixed.

• August 2020 SF: 823809

The CDI - Controlled Vocabulary parameters were always sent to CDI. This has been fixed.

• August 2020 SF: 787951, 788523, 802231, 821548, 823548

In the new UI, the improved Email Template created bad links when sent from IE and Edge. This has been fixed.

August 2020 SF: 825790

In the new UI, the placement of the Full record overlay thumbnail was misaligned and pushed the Top block slightly to the right. This has been fixed.

August 2020 SF: 824458, 840470

For advanced title searches, the "starts with" option did not work with CDI. This has been fixed.

- August 2020 SF: 836011, 836091, 838119, 840027, 841146, 842097, 842609
 In some cases with the new UI, saved search alerts were sent daily with the same results or were disabled after 90 days. This has been fixed.
- August 2020 SF: 794485
 See Ongoing Accessibility Improvements (August).

August 2020 SF: 621134, 739249

- August 2020 SF: 809841, 834703, 836001, 839585, 839786, 840730, 841077, 841885
 In some cases Primo was not loading for some users. This has been fixed.
- August 2020 SF: 849352
 Increased the number of supported authentication profiles from 10 to 20.
 - The percentages for first page results (PC, EBSCO, WorldCat, and Other indexes) in Analytics reports did not add up to 100 percent when reported annually. This is expected because the search percentages are reported daily, and when the these percentages are averaged over a period time, they will not add up to 100 percent accurately unless the total number of searches are the same every day.