Primo November 2020 Release Notes

Upcoming Issues to Note

Upgrade to OAS (Oracle Analytics Server)

We are on track to upgrade all customers to OAS by the end of November. For more details, see the Primo OAS Rollout Plan.

For local Primo (on-premises) customers, you must successfully install, at a minimum, the Primo August release before your OAS Go Live date on November 29 to continue using Primo Analytics.

Color Contrast Improvements for Accessibility

As part of our ongoing commitment to improve accessibility, we have improved the contrast of font, button, and background colors. If you have made customizations to font, button, or background colors, please make sure to adjust accordingly, noting that our changes were made to match the expected contrast ratio. More details can be found here.

For more details, see Color Contrast Improvements for Accessibility.

February 2021 Sneak Peek

- Show loading spinner as Alma Mashup is loaded.

- Show users their recent searches as suggestions in Auto-complete.
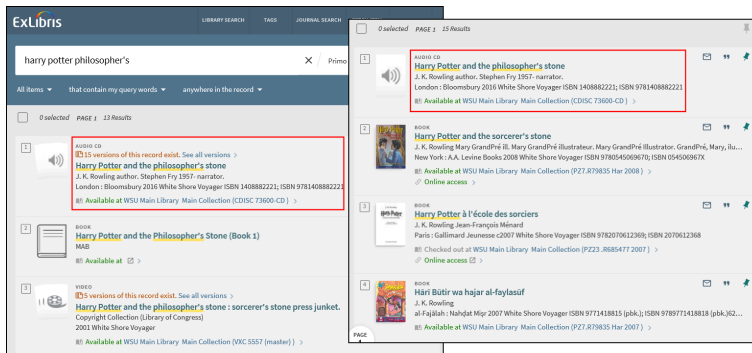
- UX improvement to My Favorites and List of Versions.

Features

Enhanced Configuration for FRBR Preferred Record: Prefer Latest Version
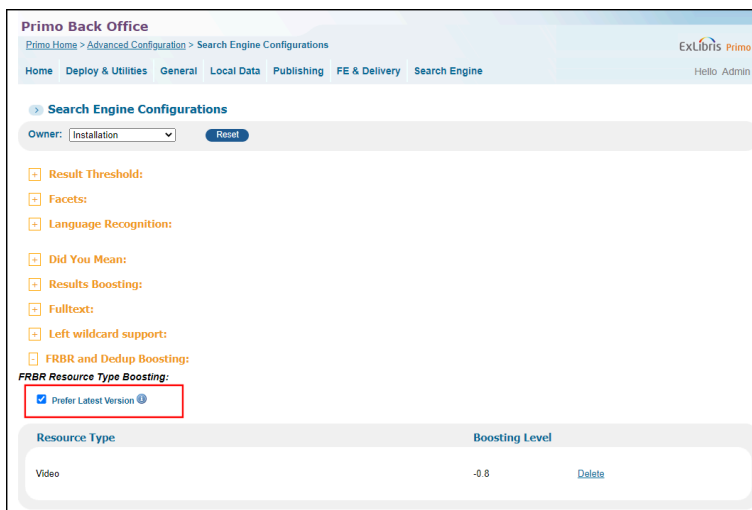
November 2020
This enhancement allows you to display the most current record by creation date as the preferred record for a FRBR group even when other records in the group have a higher ranking. If a record has no creation date, it is given lower priority over records that have a creation date. If all records in the group do not have a creation date, the record with highest ranking is used as the preferred record.

FRBR Group in Brief Results

Configuration Options

This functionality is disabled by default. If you want to enable it, select the **Prefer Latest Version** option under the FRBR Resource Type Boosting section on the Search Engine Configuration page. For more information, see Search Engine Configurations.

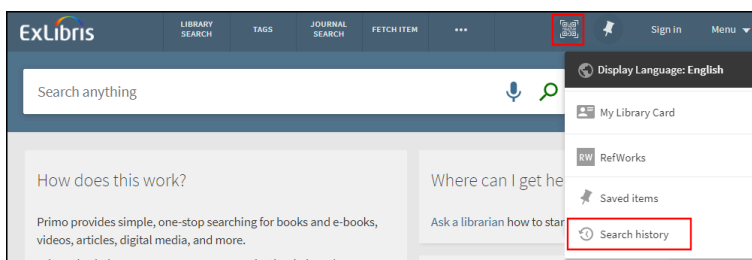**Search Engine Configuration Page**

Utilize Mobile Device Capabilities – QR Code as a Link to Primo Pages

November 2020

The QR link has been added to Primo's Main Menu to allow users to access information specific to each page in Primo (such as a specific item or a favorite search).
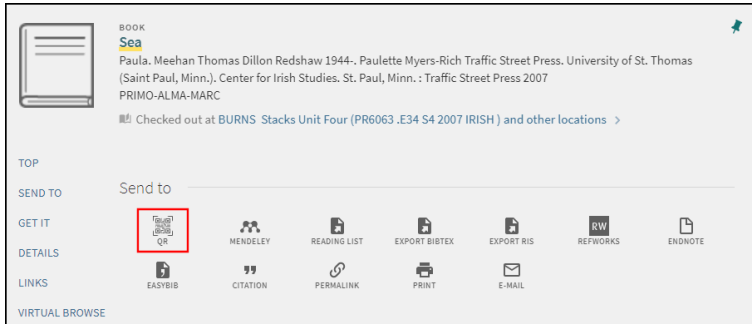

New QR Link on the Main Menu

Note

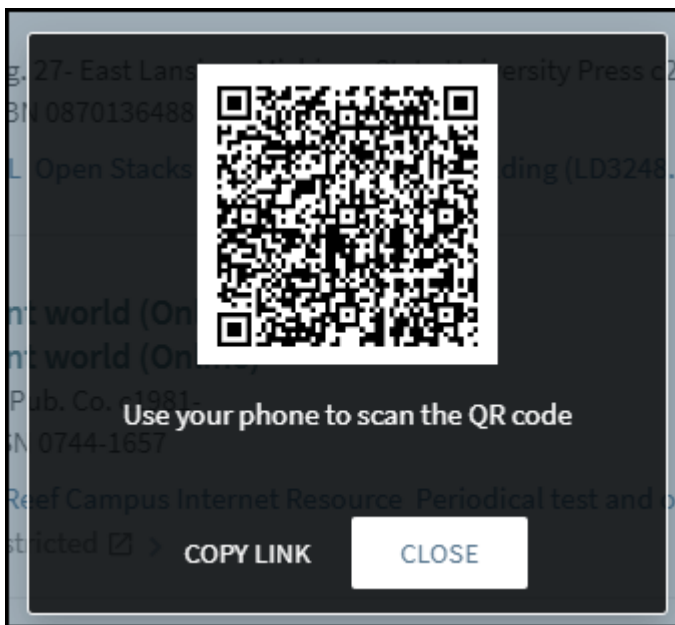This new link is replacing the Search History link, which is still available in the Main Menu drop-down list.

If enabled, users can also get a record's QR code by selecting the QR send-to action on the record's Full Display page.

QR Action on Full Display Page

Selecting a QR link displays the page's QR code, allowing users to either copy the page's permalink or use their mobile device to scan the code.

QR Code Dialog Box

Configuration Options

The following table lists the Back Office configurations associated with this functionality.

Element	Description
View Properties mapping table	The QR code in the Main Menu is enabled by default. To disable it, set the **enable_qr** parameter to **false**.

Element	Description
Actions List mapping Table	The send-to action for the QR code on the Full Display page is disabled by default. To enable it, select the row containing the **QR** action name. As with other action, you can specify its order using the Order field.
User Tile code table	The following codes were added to support the customization and translation of the labels in the QR dialog box: • `default.general.QRTooltip`: **Use QR code or copy link** • `default.general.QRCopyLink`: **Copy link** • `default.general.QRScanCode`: **Use your phone to scan the QR code** • `default.general.QRCopyLinkText`: **Link was copied**
Keeping This Item Tile code table	The following code was added to support the customization and translation of the label for the new send-to action: • `default.fulldisplay.command.pushto.option.qr`: **QR**

Analytics - QR Actions

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

Group	Subgroup	Action	Description
General	General	Click on the QR link	User selected the QR link to get the page's permalink.
Document	Actions	Click on the QR action from full record display	User selected the QR send-to action on a record's full display.

Ongoing Accessibility Improvements (November)

November 2020

As part of our continuous effort to comply with Web Content Accessibility Guidelines 2.1 Level AA, we have consulted with an external accessibility company, resolved many issues this release, and are expected to resolve more issues in the upcoming releases. To help track these improvements, you can review the attached list of Resolved Accessibility Issues.

For this release, some of the many improvements include the following:

• Modified the contrast of the font, button, and background colors. For more information, see Color Contrast Improvements for Accessibility.

> **Note**
>
> If you have made any related customizations, please make sure to adjust accordingly, noting that our changes were made to match the expected contrast ratio. For more details about these changes, see Primo November 2020 Release Changelog.

• Angular Materials was upgraded from version 1.1.0-rc.5 to 1.1.22 to resolve critical accessibility issues, such as keyboard traps in the Primo Send-To Actions. As part of this upgrade, out-of-the-box changes were made to the user

experience and behavior of some components in the Primo UI, for example:

- ◦ Modified the appearance of drop-downs when focus is placed on them.

- ◦ Changed the keyboard navigation for Send-To action components and the Main Menu.

For more details about these changes, see Primo November 2020 Release Changelog.

Add Option to Send Primo Analytics Reports to FTP Server

November 2020

This enhancement allows you to schedule Primo Analytics reports and have them sent to your FTP server to be shared with other departments. Previously, these report were sent only to a list of specified email addresses.

Configuration Options

To support this functionality, an **FTP** option has been added to the Schedule Reports and Dashboards page. Selecting this option displays the necessary fields to access the FTP server (such as **FTP Server** and **Directory**). For more details, see Scheduling Analytics Jobs.

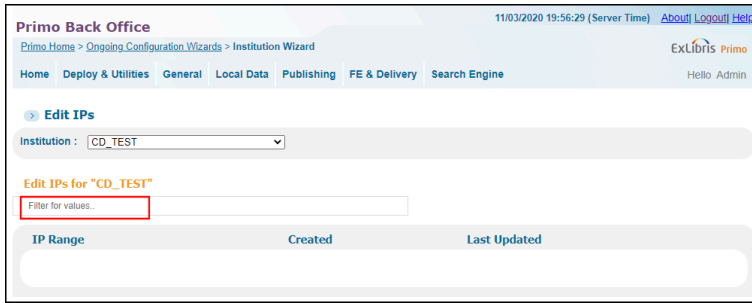**Schedule Reports and Dashboards for Primo Analytics**

Add Filter to IP Table

November 2020

A filter has been added to the Edit IPs page in the Institution Wizard to allow institutions with a large number of IP addresses to filter the list.

Edit IPs - Institution Wizard

Additional Enhancements

- **November 2020**
  FRBR boosting has been improved to support resources that have an ALMA-E delivery category.

- **November 2020**
  To support Esploro's new handle identifier, the following changes have been made to the normalization rules in the Esploro XML - Template:

  - Display/Identifier: data/identifier.handle

  - Search/General: data/identifier.handle

- **November 2020**
  o support Esploro's new Patents category and resource type, the following changes have been made to the normalization rules in the Esploro XML - Template:

  - Display/Identifier:
    - patent.number
    - identifier.govtnum

  - Display/Creation Date:
    - date.application - added to date
    - date.renewed - added to date

  - Search/General:
    - patent.number
    - identifier.govtnum

  - Search/Creation Date:
    - date.application - added to date
    - date.renewed - added to date

- **November 2020**
  For Israeli customers only, upgraded Melingo, which is the Hebrew search plug-in, to version 3.9.9. To support this change, a re-index of the data in Israel's Primo cloud environment is planned between December 3-7.

Resolved Issues

- **November 2020** SF: 840557

Using the Publication Date facet in the Brief Results as an active filter caused the facet to disappear and prevented it from being refined. This has been fixed.

- **November 2020 SF: 831197**
ORCIDs not searchable in CDI. This has been fixed.

- **November 2020 SF: 795001, 831804**
Updated the Japanese/Chinese character normalization table.

- **November 2020**
DOI search does not support brackets and colon. This has been fixed.

- **November 2020 SF: 823428**
Result count drops when results are expanded on keyword search for rsrctype newspaper_articles. This has been fixed.

- **November 2020 SF: 843749, 853247, 862969**
Selecting the "Available Online" facet limits results to Alma catalog records. This has been fixed.

- **November 2020 SF: 860285**
Search/relevancy issue with stop words in phrase queries. This has been fixed.

- **November 2020 SF: 858543**
Manual updating of Did You Mean dictionary. This has been fixed.

- **November 2020 SF: 862929**
Analysis: eBook vs Book weight in relevance ranking (evaluate and switch to new algorithm candidate). This has been fixed.

- **November 2020 SF: 867414, 869092**
Search fails when results include Illegal XML character. This has been fixed.

- **November 2020**
Updated the stemmer exception list.

- **November 2020 SF: 839902**
The Publication date facet should be asking for earlier than 1800. This has been fixed.

- **November 2020**
Summon Detail Page: Advanced Search link redirects back to Detail Page in some cases. This has been fixed.

- **November 2020 SF: 459472**
NR issue is creating duplicate entry when source is PNX and using MERGE. This has been fixed.

- **November 2020 SF: 517195**
Cannot use shift-tab to get out of the SendTo/Actions list. This has been fixed.

- **November 2020 SF: 580668, 588534, 689302, 702643, 800405, 800559**
New UI Brief and Full display > details > Author-Contributor order, text direction of mixed text including Hebrew is incorrect. This has been fixed.

- **November 2020 SF: 585383, 605399, 607964, 631549, 648889, 678434, 723839, 744156, 873199, 431056**
The basic search publication filter is working on range instead of creationdate; results set includes records from the wrong years. To support this fix:

    - The following change was made to the Alma MARC, Generic MARC, Aleph MARC, Alma KORMARC, and Aleph KORMARC templates to ensure that no enddate is created when the dates in the 008 field are not ranges:

    The Search/enddate rule was changed to create enddate if 008 Position 6 has value **cdku** instead of the previous value **cdikmqu**.

    - The following change was made to the Alma UNIMARC, Generic UNIMARC, and Aleph UNIMARC templates to

ensure that no enddate is created when the dates in the 008 field are not ranges:

The Search/enddate rule was changed to create enddate if 008 Position 8 has value **abc** instead of the previous value **abcfgu**.

- **November 2020** SF: 457208, 722639, 727838
Display/crsinfo not being merged into dedupmrg record. This has been fixed.

- **November 2020** SF: 699644
$$I is parsed incorrectly and local display values that did not belong to the institution of the view displayed in the details tab. This has been fixed.

- **November 2020** SF: 562739
NERS 6230 - see Enhanced Configuration for FRBR Preferred Record: Prefer Latest Version.

- **November 2020** SF: 712154
An unidentified record produced multiple errors in console. This has been fixed.

- **November 2020** SF: 718882
Wrongly highlighted text in description section. This has been fixed.

- **November 2020** SF: 729374, 800198, 807786
The calculation of delivery took a very long time. This has been fixed.

- **November 2020** SF: 726726
The term "body" identified as an author. This has been fixed.

- **November 2020** SF: 497639, 503625, 645228, 709226, 802856, 802857, 811422
Call number with Hebrew did not display correctly. This has been fixed.

- **November 2020** SF: 696733, 759229, 789948, 790607, 790614, 790651, 813487, 824019, 824017, 845048, 849137
Hebrew words on authors list expanded only as authors and should be added to black list. This has been fixed.

- **November 2020** SF: 789202
Email and Print actions were not working for many records. This has been fixed.

- **November 2020** SF: 647934, 658763, 692937, 794705, 794717, 797114
Scheduled Analytics reports fails due to ODBC driver error in both Primo and Alma. This has been fixed.

- **November 2020** SF: 845421
Basic search - Pre-filters codes are presented before translated (unlike other labels). This has been fixed.

- **November 2020** SF: 816626, 823248, 836307, 815699, 844612, 817764, 842604, 879938, 759098, 829151, 858083, 824705, 847245
bX Recommender had broken links at the institution level. This has been fixed.

- **November 2020** SF: 788659, 795093, 814339
The synonym file is dependent upon retrieval questions - new Melingo SP. This has been fixed.

- **November 2020** SF: 751804, 817434, 830371, 850674
Multiple warnings in pipe harvest log due to Java 11 and text from full text was not indexed. This has been fixed.

- **November 2020** SF: 834944, 862583
Deleted view was still available. This has been fixed.

- **November 2020** SF: 855402
bX recommendations partially worked. This has been fixed.

- **November 2020** SF: 857885
Back Office Admin users received 403 error for Tags Management. This has been fixed.

- **November 2020** SF: 427699
Search terms containing comma were split in Zero results. This has been fixed.

- **November 2020** SF: 864600

  OAI harvest pipe: 'Start harvesting files/records from:' should be set according to '&until' parameter. This has been fixed.

- **November 2020** SF: 883464

  The highlight parameter was ignored in the gateway. This has been fixed.

- **November 2020** SF: 846208

  Primo was using the default "other" icon instead of the customized icon. This has been fixed.