The Resource Recommender service allows you to recommend the following resources based on searchable tags that you configure in the Primo Back Office: database, website, person, library information, library guide.

When a user performs a search in which the query exactly matches the searchable tag (which may be a word or phrase), the new Primo UI displays up to three associated recommendations at the top of the brief results. User's can see all of the recommendations by clicking the See all suggested resources link.

With the May 2018 release, Resource Recommender supports the following enrichments:

<table>
<thead>
<tr>
<th>Type of Enrichment</th>
<th>Search Query</th>
<th>Searchable Tag</th>
</tr>
</thead>
<tbody>
<tr>
<td>Synonyms</td>
<td>FDA</td>
<td>food and drug administration</td>
</tr>
<tr>
<td>Inflections</td>
<td>history</td>
<td>histories</td>
</tr>
<tr>
<td>Stop words are ignored in the search query and searchable tag: a, an, and, are, as, at, be, but, by, if, in, into, is, it, for, of, on, or, no, not, such, that, the, their, then, there, these, they, this, to, was, will, with.</td>
<td>the history of the united states</td>
<td>history united states</td>
</tr>
<tr>
<td>Words ordered differently from searchable tag</td>
<td>harry potter</td>
<td>potter harry</td>
</tr>
<tr>
<td>Partial match - the number of matching words in the search query must contain 75 percent of the words</td>
<td>a people history</td>
<td>united states</td>
</tr>
</tbody>
</table>
Configuring the Resource Recommender Service

The Resource Recommender page under the Advanced Configuration menu allows you to define resource recommendations (such as a librarian or a Website) that are based on searchable tags. The searchable tags are defined per resource type and recommendation.

To configure the Resource Recommender service:


2. Click Customize if the service has not already been customized. The Delete option returns the configuration to the installation level, which may not have a default configuration. The Reset option clears all configurations.

3. From the Resource Type drop-down list, select one of the following resources:
   - **Database** - Displays the database recommendations on the left side of the All Suggested Resources page.
   - **Person** - Displays the contact recommendations on the right side of the All Suggested Resources page.

Note

Because these enrichments require indexing, enrichments for new searchable tags will not be visible until after the next indexing and hotswapping process runs.
4. From the Language drop-down list, select the display language of the recommendation.

**Note**

Before you can create a translation for a language other than **en_US**, you must first create the base recommendation (which includes searchable tags for all languages) using the default language **en_US**.

5. For each type of resource, you can configure the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name (required)</td>
<td>The name that displays for the resource in the new UI.</td>
</tr>
<tr>
<td>Searchable Tags (required)</td>
<td>The search tags that trigger this resource recommendation. If you want to specify multiple tags for a recommendation, separate them with a semicolon. You must set the Language to en_US even when adding tags for languages other than en_US.</td>
</tr>
<tr>
<td>Description</td>
<td>The resource's description, which appears for the recommendation in the new UI.</td>
</tr>
<tr>
<td>Image URL</td>
<td>The URL used to display an image for the recommendation in the new UI.</td>
</tr>
<tr>
<td>URL</td>
<td>The URL that is used to redirect users after they click the display name in the recommendation. Not applicable to Person resource types.</td>
</tr>
<tr>
<td>URL Text</td>
<td>If the URL field is specified, the system displays this text in the new UI and redirects users to the specified URL when clicked. Not applicable to Person resource types.</td>
</tr>
<tr>
<td>Email</td>
<td>This field displays only for Person resource types. It provides the email address of the contact person. If no email</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Email Text</td>
<td>This field displays only for Person resource types. If specified, this text displays instead of the user’s email address. If left empty, the Email address of the person will be displayed.</td>
</tr>
<tr>
<td>Internal Note</td>
<td>Optional descriptive text to explain the use of this resource to staff members who may be configuring recommendations.</td>
</tr>
</tbody>
</table>

6. Click **Create** to add a new recommendation for the specified resource type.

7. Repeat steps 4 and 5 to add another recommendation for the specified resource type.

8. Repeat steps 3 through 6 to define recommendations for other resource types.

9. Define the order in which the resources will appear in the new UI:

   1. Click the **Define the order of display for different types of resources** field to display the list of resource types and their order. The highest ranked resources appear at the top of the list.

   ![Define the order of display for different types of resources](image)

   **Define the Highest Ranked Resource Types**

   **Note**

   Per resource, the system lists the recommendations alphabetically by display name on the Brief Results and Recommended Resources pages.

2. Use the up/down arrows to specify the order of the the recommendations per resource type. For the highest ranked resource type, the system reserves the first two recommendation slots on the Brief Results page.

   For example, if the Database resource type has the highest ranking and has two matching recommendations, both of its recommendations will display in the first two slots. The third and last slot will be filled by the first matching recommendation from the next highest ranked resource.
10. Select the **Enable Resource Recommender** check box to enable the service in the new UI.

11. Click **Deploy**.

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### Modifying a Recommendation

After creating a recommendation, you can modify various fields as needed. For information on how to create a new recommendation, see [Configuring the Resource Recommender Service](#).

**To modify a recommendation:**

1. Open the Resource Recommender page (**Primo Home > Advanced Configuration > Resource Recommender**).

2. In the Current Resource List section, edit any of the enabled fields (such as Display Name) for each recommendation.

3. Click **Save list**.

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### Importing Recommendations

The Resource Recommender page allows you to import recommendations per resource and language using an Excel file. All recommendations must be first created in the default display language en_US and then translated for each language in subsequent imports.

Depending on the resource type, some of the following columns must be included in the Excel file even if you do not plan on entering values:
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| key     | The internal key, which is used to track the recommendations. This field is required for all resource types, but you can leave it blank when adding or replacing recommendations.  
|         | **Note**  
|         | When creating translations for languages other than the default en_US, you must specify an existing key, which must be created first using the default language en_US. |
Database Resource Recommendation

To import recommendations:


2. Click Customize if the service has not already been customized. The Delete option returns the configuration to the installation level, which may not have a default configuration. The Reset option clears all configurations.

3. In the Resources section, select the Resource Type and Language for which you want to import recommendations.

4. In the Add new resources via Excel file upload section, click Browse and select the Excel file that you created for this type of resource.

5. Choose one of the following options:

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Note

Before you can create a translation for a language other than en_US, you must first create the base recommendation (which includes searchable tags for all languages) using the default language en_US.

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add Resources – (en_US) Click this button if you want to add recommendations to the existing list of recommendations for this resource type.

Replace all resources – (en_US) Click this button if you want to replace all recommendations for this resource type.

Upload Translation – (not en_US) Click this button if you want to translate display information, URLs, and email information for use with another language. It may help to export the existing settings for a language, modify the Excel file, and then import updated file.

6. Click Deploy to update the new Primo UI.

Exporting Recommendations

The Resource Recommender page allows you to export recommendations per resource and language to an Excel file. This allows you to modify many recommendations at once, create translations, and import the updated Excel file into the Resource Recommender page (see Importing Recommendations).

To export recommendations:


2. Click Customize if the service has not already been customized. The Delete option returns the configuration to the installation level, which may not have a default configuration. The Reset option clears all configurations.

3. In the Resources section, select the Resource Type and Language for which you want to export recommendations.

4. Click Export to Excel.