Primo VE November 2020 Release Notes

Upcoming Issues to Note

Upgrade to OAS (Oracle Analytics Server) and DV (Data Visualization)

As part of the platform upgrade, the OBI that Primo VE Analytics uses is being upgraded to OAS (Oracle Analytics Server), which includes DV (Data Visualization). As many in the Ex Libris community are aware, the original plan was to upgrade to OBI 12. However, on January 31, 2020, Oracle replaced OBI 12 with OAS (Oracle Analytics Server). To read the OAS Upgrade Q&A, click here.

The following table details the rollout plan for the OAS:

Environment	Freeze Start Date	OAS Go-Live Date
EU03	June 17	June 21
NA02	July 13	July 19
NA03	July 13	July 26 (updated from 22.7)
NA01	July 13	July 26
CA01, AP01	August 23	August 30
NA91	August 30	September 6
EU00, EU01, EU02	October 11	October 18
NA04, NA05, NA06, NA07, CN01	November 1	November 8

You may need to take certain steps prior to migration. See Ensuring Reports are Migrated.

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](#).

December Sneak Peek

- QR code – Allows users to share or promote Primo VE pages using a QR code.

- Enhanced Resource Recommender – Add option to configure Resource Recommender at the view level.

- Real-Time Descriptions for Items in Resource Sharing Requests.

- Enhanced Dedup and FRBR Test Utility with an option to recalculate the groups.

Features

Broaden Availability Status in Brief Results

November 2020

Previously, the following availability statuses were displayed to end users in the brief display of each record in the search results: **Available**, **Not Available**, and **Check Holdings**. The **Not Available** status appeared for any record that was not available and did not provide enough information regarding the status of the record. With this enhancement, the statuses such as the following will replace the **Not Available** status when this functionality is enabled: **Not available - Loan**, **Not available - Requested**, and **Not available - Lost**.

Enhanced Availability Status in Brief Results

Note

When this functionality is enabled, the enhanced availability statuses appear only when a single-item record is not available. Otherwise, the general status **Not available** will be displayed.

Configuration Options

This functionality is disabled by default. The following table lists the configuration options supported by this functionality.

Element	Description
Discovery Customer Settings page (**Configuration Menu > Discovery > Other > Customer Settings**)	When set to **true**, the new **broaden_availability_status** parameter allows you to display the enhanced availability statuses when a single-item record is not available.
Calculated Availability Text Labels (**Configuration**	The following codes have been added to support the various reasons that a record

Element	Description
Menu > Discovery > Display Configuration > Labels)	may not be available: • `delivery.code.Acquisition`: **Not available - Acquisition** • `delivery.code.ClaimedReturned`: **Not available - Claimed Returned** • `delivery.code.HoldShelf`: **Not available - Hold Shelf** • `delivery.code.Loan`: **Not available - Loan** • `delivery.code.Lost`: **Not available - Lost** • `delivery.code.InProcess`: **Not available - In Process** • `delivery.code.Missing`: **Not available - Missing** • `delivery.code.ResourceSharingRequest`: **Not available - Resource Sharing Request** • `delivery.code.TechnicalMigration`: **Not available - Technical - Migration** • `delivery.code.Transit`: **Not available - Transit** • `delivery.code.Requested`: **Not available - Requested**

Boost My Institution

November 2020

This enhancement allows an institution in a consortium to boost its search results over results from other member institutions. By default, no boost is applied to your institution, which means that results from your institution will receive the same relevance ranking as results from other institutions.

Configuration Options

The **Boost My Institution** option has been added to the new Institution Boosting section on the Ranking Configuration page (**Configuration Menu > Discovery > Search Configuration > Ranking Configuration**). When the **Boosting Factor** for this option is set to a number greater than 1, a positive boost is applied to your institution's records. A negative boost is applied by specifying a decimal value between 0 and 1. For more information, see Configuring the Ranking of Search Results in Primo VE.

General Hold Request Form Enhancements

November 2020

The following fields are now available in the Hold Request and Digitization Request forms configuration tables, and can be added to the General Hold/ Request Another Issue and the General Digitization / Digitize Another Issue requests in Primo (for holdings with no items or serial holdings):

- Volume
- Issue
- Part
- Chapter
- Publication date
- Chapter/Article Title
- Chapter/Article Author
- Start Page
- End Page

If metadata exists, the fields are automatically populated, as is done in the Resource Sharing form.

To use these fields, they must be activated on the Hold Request / Digitization Request Form Customization pages.

The request APIs functionality remain unchanged. All description fields are sent as part of the manual description parameter.

Note

The new description fields will be added to the manual description in Alma to allow them to appear in pick from shelf, requests slips, and so forth to maintain all current workflows.

See Configuring Request Forms for Primo VE.

Configuration Options

The new fields on the request forms are disabled by default. The following table lists the configuration options associated with this functionality.

Element	Description
Request (Hold and Booking) Optional Parameters mapping table	For each new field that you want to display in the physical request forms, set the **Display to Public** field to **Yes**.
Digitization Optional Parameters mapping table	For each new field that you want to display in the digitization request forms, set the **Display to Public** field to **Yes**.

Element	Description
Digitization Labels code table	The following codes have been added to support the labels associated with this functionality: • `almaDigitization.volume`: **Volume** • `almaDigitization.issue`: **Issue** • `almaDigitization.part`: **Part** • `almaDigitization.publicationDate`: **Publication Date**
Request Labels code table	The following codes have been added to support the labels and error messages associated with this functionality: `almaRequest.chapterArticleTitle`: **Chapter/Article Title** `almaRequest.chapterArticleAuthor`: **Chapter/Article Author** `almaRequest.volume`: **Volume** `almaRequest.issue`: **Issue** `almaRequest.part`: **Part** `almaRequest.publicationDate`: **Publication date** `almaRequest.mandatory_manual_description_or_alternative_fields`: **Please fill in at least one of the following fields: {0}**

Indication for Bound-With Relations (Not Related Intellectually)

November 2020

Previously, the following types of bound-with records (which are linked using the MARC 773/774 linking fields) were displayed identically as **Is Part Of**/**Related titles** in the record's full display:

- Related - The bound-with records are related intellectually with each other. For example:

  The physical title **Prayer Book** is bound with physical title **Readings from the Holy Scriptures**.

- Unrelated - The bound-with records are not related intellectually with each other. For example:

  The physical title **Prayer Book** is bound with physical title **The first edition of Agatha Christie Murder on the Orient Express**.

In the following example, the 773 field is added to the constituent record to link the records in the Full Display:

- **Constituent record** - `773 0# $$i Bound with $$t To kill a mockingbird. $$w (DLC)2088:`

Is Part Of and Related Title Labels on Linking Record

- **Host record**:

Related Titles Label on Linked Record

With this enhancement, you can provide a separate display indication called **Bound with** for records that are not related intellectually by setting the $$9 subfield to **unrelated** in the 773/774 linking field. For example:

- **Constituent record** - `773 0# $$i Bound with $$t To kill a mockingbird. $$w (DLC)2088 $$9 unrelated`:

Bound With Labels on Linking Record

- **Host record**:

Bound With Label on Linked Record

Configuration Options

The following table lists the configuration options associated with this functionality.

Element	Description
Metadata Editor in Alma	To replace the **Is Part Of** and **Related Titles** labels with the **Bound with** label in record's full display, add the **$$9 unrelated** subfield to the 773 and 774 linking fields.
View Configuration Page (**Configuration Menu > Discovery > Display Configuration > Configure Views**)	The **Bound with** field has been added to the Details code on the Full Record Services tab.
Full Display Labels code table (**Configuration Menu > Discovery > Display Configuration > Labels**)	The following code has been added to support the Bound with label in the Details section on the Full Display page: `fulldisplay.boundwith`: **Bound with**
Get It Service Labels code table (**Configuration Menu > Discovery > Display Configuration > Labels**)	The following code has been added to support the related titles on the Full Display page:

Element	Description
	`nui.location.unrelated_title`: **Bound with**

Lookup and Select Option on Request Forms

November 2020

For consortia with at least seven member institutions, the **Other Institutions** drop-down list will be added to the top of each request form to allow users to request material from another member institution in the consortium.

New Other Institutions Drop-Down List

Configuration Options

This functionality is enabled by default for consortia. The following table lists additional configuration options to support this functionality.

Code Table	Description
Request Labels	The following codes were added to support the new display labels for this enhancement: • `nui.request.lookUpInstitution`: **Look up or select institution**

Code Table	Description
	• `nui.request.lookUpLocation`: **Look up or select location**
Aria Labels	The following codes were added to support accessibility labels for this enhancement: • `nui.aria.lookUpInstitution`: **Look up or select institution** • `nui.aria.lookUpLocation`: **Look up or select location**

Chat with Support

November 2020

This enhancement allows staff users who have chat permissions to chat with our Support team regarding the following types of Primo VE issues directly from within the Alma management interface:

- Simple how-to questions and configurations

- Behavior and general inquiries

- Known issues

For more details, see FAQ.

Note

Beginning on November 1, 2020, this functionality will be available only for Primo VE institutions that have gone live with Primo VE on European Alma instances. For all other Alma instances, this functionality will be rolled out gradually.

For users who have chat permissions (see Configuration Options), the Chat icon will appear in Alma's persistent menu. To begin a chat session, select the **Chat** icon in your Alma Production environment:

Chat Icon in Alma's Persistent Menu

Configuration Options

This functionality is disabled by default. Only staff users who have been assigned the **Chat with Support** role will be permitted to open a chat session with our Support team. For more details, see Managing User Roles.

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.

Specifically for this release, we have improved the contrast of font, button, and background colors. 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. More details can be found here.

For more details, see Color Contrast Improvements for Accessibility.

Additional Enhancements

- **November 2020 SF: 00619015, 00668016, 00730969**
  The New Records facet was prevented from appearing in the search results due to performance issues. This has been fixed.

- **November 2020 SF: 00619035, 00711530**
  The MARC 245 $$k subfield is now indexed and searchable in the title if the record is a manuscript or other type of document that does not include title information in the $$a subfield.

  Note

  For new and updated records, this will be effective immediately, but for existing records, the change will not be completed until we run the Primo VE semi-annual indexing, which is planned to be ready by the February 2021 release. For more details, see Release and Maintenance Schedule.

- **November 2020 SF: 00652599**
  For consortia, the Dedup and FRBR Test Utility now allows you to find matching records in Dedup and FRBR groups.

- **November 2020**
  With this enhancement, the authority records will no longer be enriched with your record's 5XX fields out of the box. They will remain enriched until your records are re-indexed. If you want to continue using the MARC 5XX enrichment for new and updated records, you must set the new **index_5XX_authorithy_fields** parameter to **true** on the Discovery Customer Settings page. By default, this parameter is set to **false**.

  Note

  For new and updated records, this will be effective immediately, but for existing records, the change will not be completed until we run the Primo VE semi-annual indexing, which is planned to be ready by the February 2021 release. For more details, see Release and Maintenance Schedule.

- **November 2020**
  This enhancement prevents users from creating booking requests over closed days in the library. If the user attempts to create a booking request over a closed day, the system will return an error message. To support this functionality, the following code was added to the Request Labels code table:

  `400306`: **The resource cannot be booked while the library is closed**.

Resolved Issues

- **November 2020 SF:642483, 658149**

When author information is not in the au element of the OpenUrl, authors will be missing from generated citations on the Services Page. This has been fixed.

- **November 2020 SF:687341**
No search expansion with controlled vocabulary message in search results for local scopes. This has been fixed.

- **November 2020 SF:744836, 815124**
IDP-initiated logout fails (SAML). This has been fixed.

- **November 2020 SF:733426,808487, 854141, 876894**
Repeated saved search emails being sent to users. This has been fixed.

- **November 2020 SF:675694,795580**
For UNIMARC, the 461/463 related record links did not display down links from the upper record. This has been fixed.

- **November 2020 SF:710318,744934, 787740, 835260**
The pickup location for Automated Fulfillment Networks did not display the correct location in My Account. This has been fixed.

- **November 2020 SF:744137, 790977**
When there were multiple courses, the crsinfo field was incomplete when displayed on the Brief Display page. This has been fixed.

- **November 2020 SF:802847, 842590**
Angle brackets used to indicate non-filing text in UNIMARC linking fields were displayed in the record's display fields. This has been fixed.

- **November 2020 SF:817826**
 Inactive portfolios and representations appeared in 'View it on other institution'. This has been fixed.

- **November 2020 SF:836443**
When the **alphabetical_sort_pickup_inst_lib** is set to **true**, it returned the first alphabetic location instead of the first available alphabetic location. This has been fixed.

- **November 2020 SF:873130, 863133, 858917, 864888, 859887, 865947, 868415, 874137, 862807, 865487, 877854, 862347, 871920, 860412, 880663, 861673, 870420**
In some cases, the View It section appeared empty when electronic and physical records were deduped and the record displayed first displayed the physical item. This has been fixed.

- **November 2020 SF:788091**
For UNIMARC 461/463, the label in the parent record incorrectly displayed **Part of** instead of **Contains** in the Related Titles display field. This has been fixed.

- **November 2020 SF:665945, 860837, 861259, 873703, 876844**
The new instPublicKey API for Primo VE did not work as documented. This has been fixed.

- **November 2020 SF:859616, 870599**
Digital Collection facet values displayed codes of suppressed collections. This has been fixed.

- **November 2020 SF:851593**
An error displayed while submitting a Digitization request in Get It using the Spanish interface. This has been fixed.

- **November 2020 SF:862391**
Resource Sharing requests received in Alma always had the Specific Edition option selected. This has been fixed.

- **November 2020 SF:856824, 869286**
The Services Page and its delivery options were very slow across the consortium. This has been fixed.

- **November 2020 SF:667243**
Focus is jumping to Get It after performing actions in Getit other. This has been fixed.

- **November 2020 SF:859344**
When the 'c.search.htmlCreator.unifiedDisplay' code was set to undefined, its label displayed NOT_DEFINED instead

of nothing for Available locations in Get It. This has been fixed.

- **November 2020** SF:634501
  Digitization Status was not translated in Get It. This has been fixed.

- **November 2020** SF:874496
  Digitization requests for other items failed in some cases. This has been fixed.

- **November 2020** SF:852177
  In expected cases, the creation date was not hidden for journals in brief display. This has been fixed.