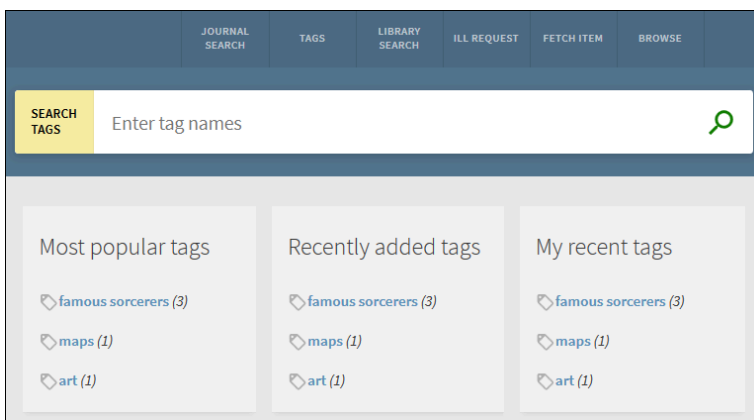


Primo VE August 2017 Release Notes

The following features are new or changed in this month's release of Primo VE.

Support of Tags and Tag Management

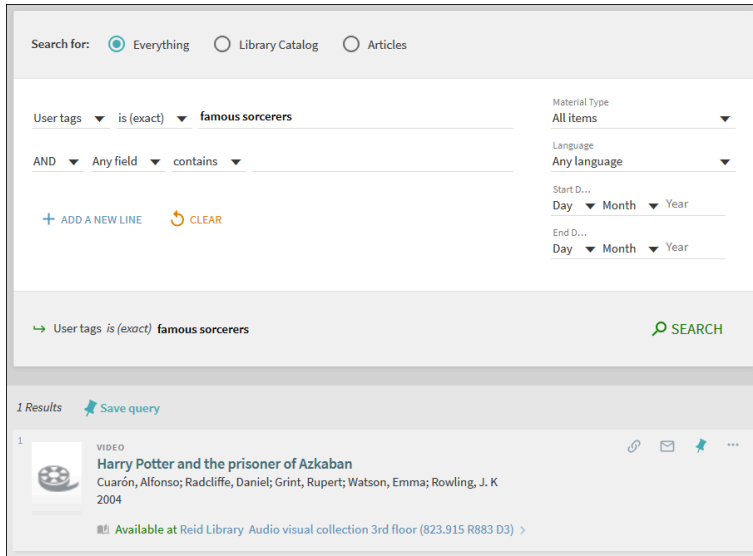
This enhancement enables the Tag functionality in Primo VE, which also includes tag management (see [Manage User Tags](#)). Tags allow librarians and other users to categorize records into lists, which are indexed and shared with other users on the Tags page.



Tags Page

From this page, users can search for tags, view the most popular tags, view recently added tags, view my recently added tags, and display the list of records that have been tagged. The numbers in parentheses beside the tag names indicate how many records have been marked with the tag.

Clicking the tag name in the Tag results, opens the results page, which displays a filled-out Advanced Search box followed by the list of records. Users can then modify the search to find additional records. In the following example, only a single record had been tagged:



Results List for a Tag

Creating Tags in the New UI

All users can view tags and their lists, but only signed-in users can create tags.

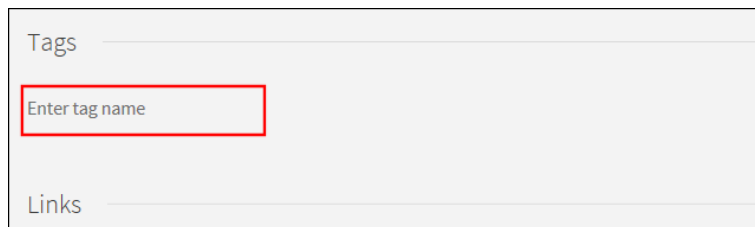
To create a tag:

1. Perform a search for a record.
2. Open the record's full display page.



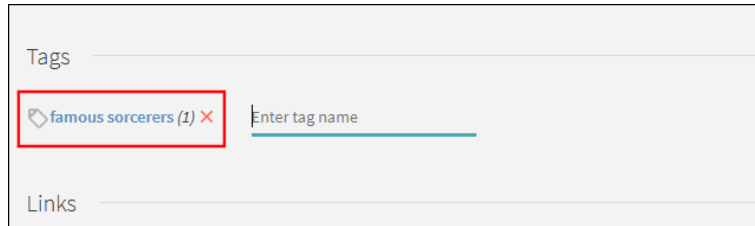
Tags Section on Full Display Page

3. In the Tags section, click **ADD YOUR OWN TAGS**.



Enter Tag Name

4. Type the name of the tag on the line and press **[RETURN]**.



New Tag Added

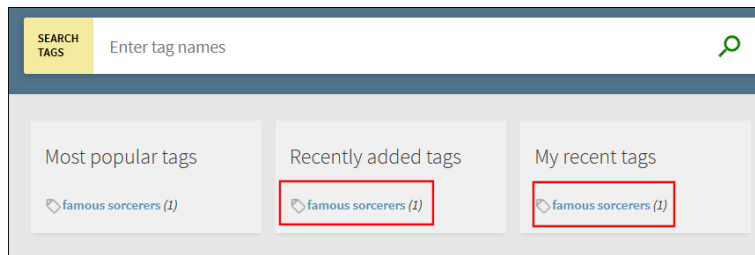
Deleting Tags in the New UI

[Edit section](#)

Users can delete only their own tags.

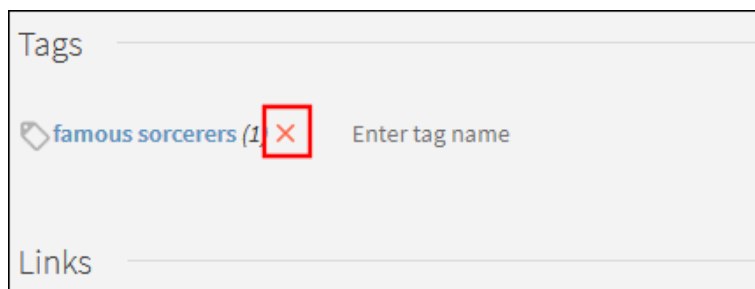
To delete a tag:

1. On the Tags page, click the tag that you want to edit.



Find Tag to Delete

2. On the results page, open the record's full display.



Delete Record's Tag

3. In the Tags section, click the **X** next to the tag that you want to remove.

Configuration Options

[Edit section](#)

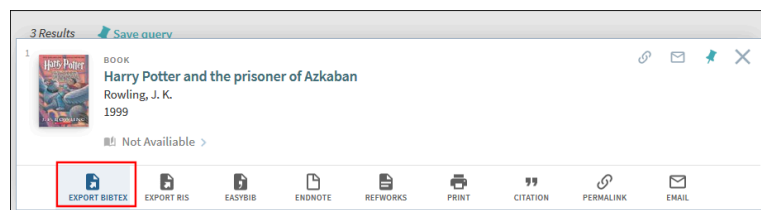
The following table describes the configuration that supports this functionality.

Tags Configuration

Element	Description
Links Menu tab in View Configuration	Enables/Disables the tags functionality and the Tags link that displays on the Main menu in Primo VE.
Full Record Services tab in View Configuration	The Tags service displays in the Full Display view of the record.
Tag Management	The Manage Tags page (Discovery Configuration > Display Configuration > Manage Tags) allows staff users to monitor the tags that have been added by users and remove any that appear inappropriate. For more information, see Manage User Tags .
View Labels code table	<p>The following code has been added for the Tags link in the Main menu:</p> <ul style="list-style-type: none"> <code>default.mainmenu.label.tags: TAGS</code> <p>The following code has been added for the Tags link's tooltip when hovering over the link:</p> <ul style="list-style-type: none"> <code>default.nui.mainmenu.description.tags: Tags</code>
Tags Tile Labels code table	Defines the display labels that are associated with tags. Specific codes for the new UI start with the <code>default.nui</code> prefix.
GetIT! Tab1 Labels code table	<p>The following new code defines the name of the section in the record's full display:</p> <ul style="list-style-type: none"> <code>default.nui.brief.results.tabs.tags: Tags</code>

Export to BibTeX

This enhancement allows users to export a record to BibTeX format from either the Brief or Full display pages using the new **Export BibTeX** action.



Export BibTeX Action

The following figure shows an example of an export to BibTeX:

```
@book{alma991308290000541,
abstract = "During his third year at Hogwarts School for witchcraft and wizardry, Harry Potter must confront the devious and dangerous wizard responsible for his parents' deaths."
author = "Rowling, J. K."
address = "New York"
isbn = "0439136350"
keywords = "Hogwarts School of witchcraft and wizardry (Imaginary place)"
language = "eng"
lccn = "99023982"
publisher = "Arthur A Levine Books"
title = "Harry Potter and the prisoner of Azkaban"
year = "1999"
}
```

BibTex Format Example

Configuration Options

The following table describes the configuration that supports this functionality.

Export BibTex Configuration

Element	Description
Brief Record Display tab in View Configuration	The BibTeXPushTo code allows you to enable/disable this action under the Keep This Record Actions section.
Keeping This Item Tile Labels code table	The following code has been added for the Export BibTex action: <ul style="list-style-type: none"> <code>fulldisplay.command.pushto.option.BibTeXPushTo: Export BibTex</code>

Hide Request Forms under Fulfillment Menu

The following links will be hidden under the Fulfillment Configuration menu and displayed only under the Discovery Configuration menu for Primo VE environments:

- Labels
- Primo View to Libraries
- Hold Request Form Customization
- Booking Request Form Customization
- Digitization Request Form Customization
- Resource Sharing Form Customization

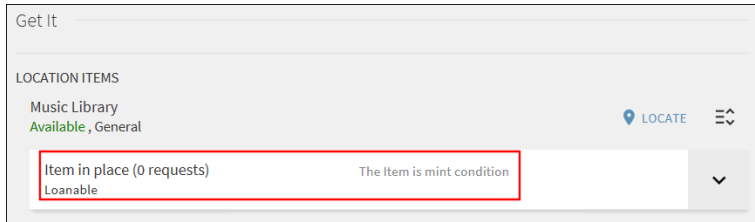
For more details about the request forms, see [Configuring Request Forms](#).

Item Display Configuration

This enhancement allows you to configure the information that appears in the following areas under the Get It section on the record's full display page.

- Brief item display - This section opens instantly and can contain up to four displays lines (two on each side). Out of the box, Primo VE displays the item's status, terms of use, and the item's description on separate display lines if available

for the item. You can configure up to four display lines. Each line can contain up to three fields, which are separated by your choice of delimiter.

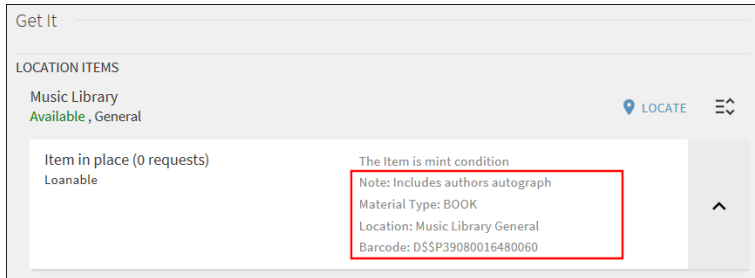


Brief Item Display - First Two Rows on Each Side (if needed)

- Full item display - The user must click the down arrow



to display the information that appears in these display lines. Out of the box, Primo VE displays the additional call number, public notes, material type, location (which includes the library, location, and call number fields), and the barcode on separate display lines if available for the item. You can configure up to 12 display lines. Each line can contain up to three fields, which are separated by a space.



Full Item Display - Right Side Only

Configuration Options

The following table describes the configuration that supports this functionality.

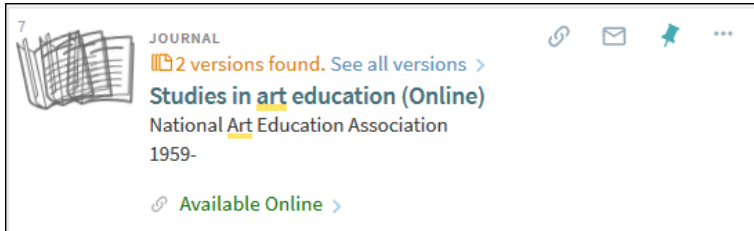
Brief and Full Item Display Configuration

Element	Description
Display Items	The Display Items page (Discovery Configuration > Display Configuration > Display Items) allows you configure the display lines for both the brief and full item display areas under the Get It service. For more details, see Configuring the Brief and Full Item Displays .
Item Display Brief Display Labels code table	This table configure the labels in the brief item display.
Item Display Full Display Labels code table	This table configure the labels in the full item display.

Display of Generic FRBR Record

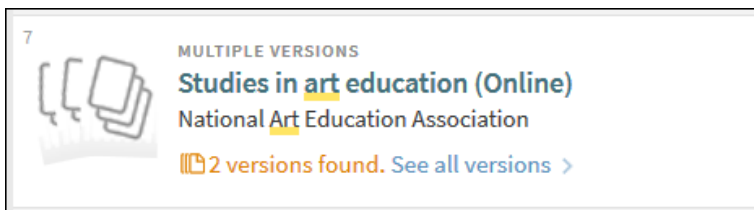
FRBR groups are used to group records with multiple versions so that duplicate records are not displayed in the results. When displaying FRBR groups in the results, you have the following options:

- Preferred record - With this option, Primo VE picks a preferred version from the FRBR group and displays its information. When selected, users are taken to the preferred record by default. Users can access the other versions by clicking the **See all versions** link.



Preferred Record Shown in Primo VE

- Generic FRBR record - This is the new default option in the system. With this new option, Primo VE displays generic information that applies to all versions and does not include availability information and record actions in the brief record display. When selected, users are taken to a results list, which contains all of the record's versions.



Generic Record Shown in Primo VE

Configuration Options

The following table describes the configuration that supports this functionality.

FRBR Display Configurations

Element	Description
Brief Results tab in View Configuration	<p>The following FRBR configuration options are available in the FRBR Display section:</p> <ul style="list-style-type: none"> • Sort FRBR Versions list by – Select one of the following options to indicate how the system should sort the results in the List of Versions page, which is accessed by clicking the see all versions link in the record's brief display: Date - oldest, Date - newest, Title, and Author. • Define FRBR Display for local records – Select one of the following options to determine what information displays for the FRBR group in the brief results: <ul style="list-style-type: none"> ◦ Preferred – Primo VE dynamically selects one of the records from the group for display in the brief results list. This is the preferred record. The preferred record is the highest ranked record from the results set. From the preferred record, the system displays the availability link, record actions, and the See all versions link to display the other versions for the FRBR group. ◦ Generic – The generic record serves as a placeholder for the group and does not include the data and functionality

Element	Description
	that is relevant to a specific record (such as the availability status). It only indicates that multiple versions of the title have been found. End users can click either the title or the See all versions link to display the versions for the FRBR group.
Results Tile Labels code table	<p>The following codes define the labels for generic and preferred record versions:</p> <ul style="list-style-type: none"> <code>nui.frbrversion.found: {0} versions found</code> <code>nui.frbrversion.found.link: See all versions</code>

Browse Search

This enhancement enables the Browse functionality in Primo VE. A browse search returns an alphabetical list (based on the type of browse selected and the search terms specified by the user). Each item in the results list returns a list of related records. Currently, the following types of browse searches are supported: Author, Title, and Call Numbers of the following types: Library of Congress, Dewey, and SUDOC.

The screenshot shows a navigation bar with tabs: JOURNAL SEARCH, TAGS, LIBRARY SEARCH, ILL REQUEST, FETCH ITEM, and BROWSE SEARCH. The 'BROWSE SEARCH' tab is active. Below the tabs is a search bar with a dropdown menu set to 'Browse by Author' and a text input field containing 'Enter term'. A magnifying glass icon is on the right side of the search bar.

Browse Page in Primo VE

The following figure shows an example of the alphabetical list returned by a title browse. Users can then click one of the items in the list to display the brief results for the item.

The screenshot shows the search bar with 'Browse by Title' selected and 'harry potter' entered. Below the search bar is a list of results:

Garden flowers in color : a picture cyclopedia of flowers /	1 record
Harry Potter and the deathly hallows /	1 record
Jasbo Brown and selected poems,	1 record
Jazz country.	1 record
Leaving orbit	1 record
Man	1 record
The mauve decade; American life at the end of the 19th century.	1 record

Browse by Title

Configuration Options

The following table describes the configuration that supports this functionality.

Browse Configuration

Element	Description
Links Menu tab in View Configuration	Enables/Disables the Browse link that displays on the Main menu in Primo VE. In addition, you can specify which of the following types of Browse are offered to users: Author, Title, Call Number types (0 - Library of Congress, 1 - Dewey, 3 - SUDOC).
View Labels code table	<p>The following code has been added for the Browse link in the Main menu:</p> <ul style="list-style-type: none"><code>mainmenu.label.Browse: Browse Search</code> <p>The following code has been added for the Browse link's tooltip when hovering over the link:</p> <ul style="list-style-type: none"><code>nui.mainmenu.description.Browse: Browse Search</code>
Browse Search Labels code table	Defines the display labels that are associated with browse.

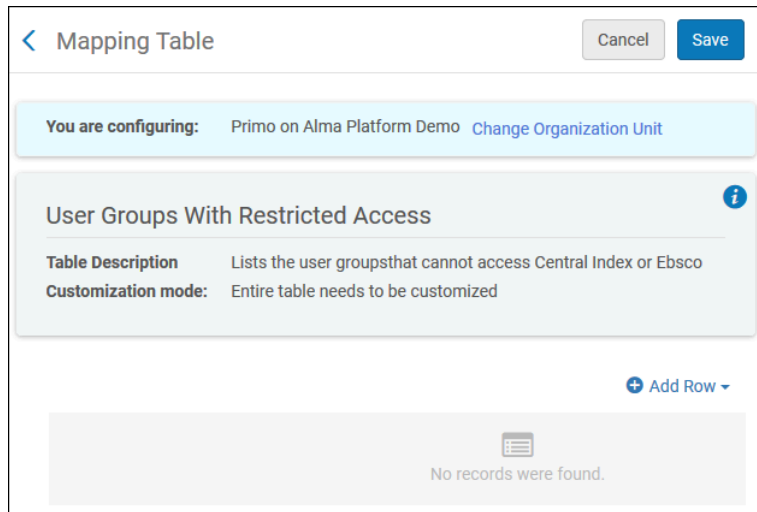
Block User Groups from Restricted Records

This functionality enables customers to prevent users that belong to specific user groups from searching restricted Primo Central collections and EBSCO search. This may be necessary if a user group (for example, alumni who have user accounts and sign-in off campus) is not permitted access, but the institution as a whole is permitted access.

If a signed-in user is not on campus, Primo will check to see if the user belongs to one of the restricted user groups defined here before sending a request to Primo Central or EBSCO. If the user belongs to a restricted group, the user will not have access to restricted collections provided by the specified adaptor (PCI, EBSCO) unless the user is on campus.

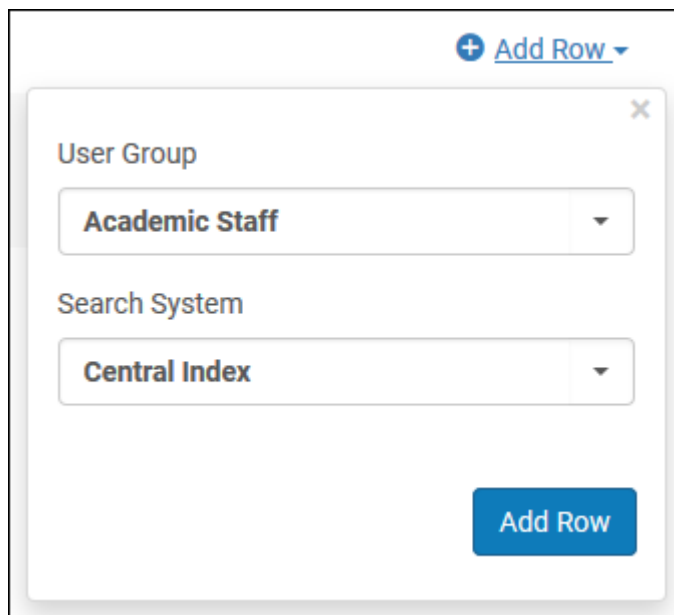
To restrict a user group:

1. On the Discovery Configuration menu (**Configuration Menu > Discovery**), click **Restricted User Groups (Central Index/EBSCO)** under **Authentication** to open the User Groups with Restricted Access page.



User Groups with Restricted Access Page

2. Click **Add Row** to open the Add Row dialog box.



Add Row Dialog Box

3. In the Add Row dialog box, specify the following fields:
 - **User Group** – Select the user group to which you want to restrict access.
 - **Search System** – Select either **Central Index** or **Ebsco**.
4. Click **Add Row**.

Mapping Table Cancel Save

You are configuring: Primo on Alma Platform Demo [Change Organization Unit](#)

User Groups With Restricted Access i

Table Description: Lists the user groupsthat cannot access Central Index or Ebsco
Customization mode: Entire table needs to be customized

+ Add Row ↻

	Enabled	User Group	Search System	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>	Alumni	Ebsco	Ex Libris	2017/07/17	...

User Group Restriction Added

Next Month Sneak Peek

Features scheduled for next month include:

- Search expansion – expanding search terms with additional variations based on controlled vocabulary
- Persistent Facets – enabling users to retain facet selections throughout searches in a session
- Sort in Favorites – sort by date, author, and title in My Favorites
- Multiple Facet Selection – allowing users to include/exclude multiple facets at a time to filter their search results