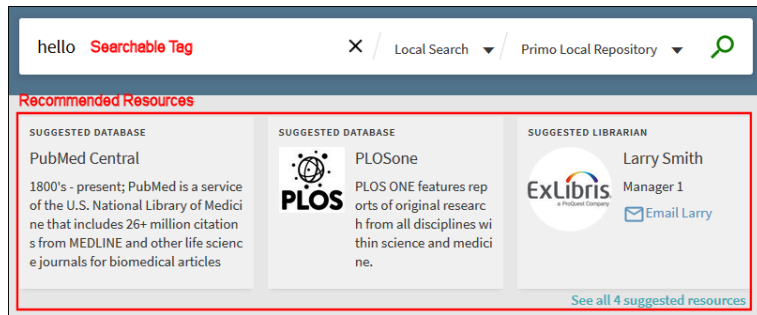


Primo VE November 2017 Release Notes

Resource Recommender Service

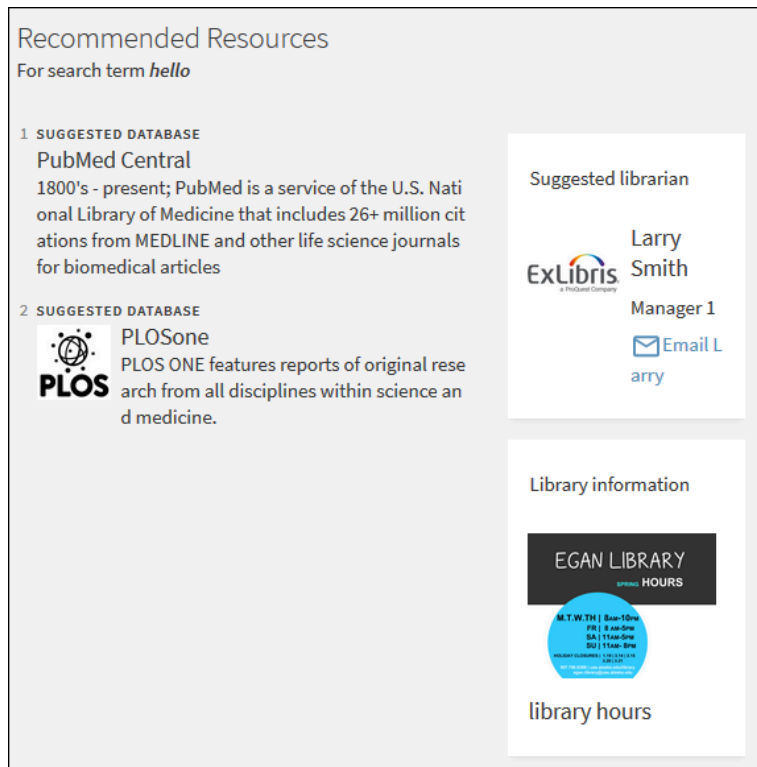
The Resource Recommender service allows you to recommend the following types of resources based on searchable tags that you configure in Primo VE: database, website, person, library information, library guide, and up to three custom resources.

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.



Resource Recommender Service on the Brief Results Page

The user may view additional recommendations by clicking the **See all suggested resources** link.



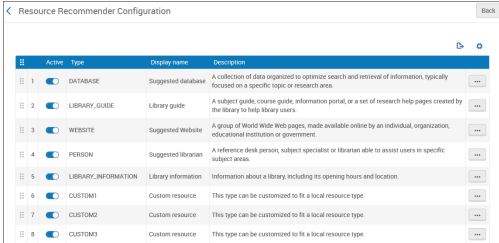
Note

- You can display a maximum of ten recommendations on the All Suggested Resources page.
- All recommendations appear on the left side of the page unless they are based on the following resource types: Person, Library Information, and Library Guide.

Configuration Options

The following table describes the configuration that supports this functionality.

Resource Recommender

Page	Description																																				
Resource Recommender Configuration (new)	<p>This page (Configuration Menu > Discovery > Other > Resource Recommender Configuration) defines the resource recommendations for each type of recommendation. For more details, see Resource Recommender for Primo VE.</p>  <p>The screenshot shows a configuration page titled 'Resource Recommender Configuration' with a table of resource types. The table has columns for 'Index', 'Type', 'Display name', and 'Description'. The rows are as follows:</p> <table border="1"> <thead> <tr> <th>Index</th> <th>Type</th> <th>Display name</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>DATABASE</td> <td>Suggested database</td> <td>A collection of data organized to optimize search and retrieval of information, typically focused on a specific topic or research area.</td> </tr> <tr> <td>2</td> <td>LIBRARY_GUIDE</td> <td>Library guide</td> <td>A subject guide, course guide, information portal, or a set of research help pages created by the library to help library users.</td> </tr> <tr> <td>3</td> <td>WEBSITE</td> <td>Suggested Website</td> <td>A group of World Wide Web pages, made available online by an individual, organization, educational institution or government.</td> </tr> <tr> <td>4</td> <td>PERSON</td> <td>Suggested librarian</td> <td>A reference desk person, subject specialist or librarian able to assist users in specific subject areas.</td> </tr> <tr> <td>5</td> <td>LIBRARY_INFORMATION</td> <td>Library information</td> <td>Information about a library, including its opening hours and location.</td> </tr> <tr> <td>6</td> <td>CUSTOM1</td> <td>Custom resource</td> <td>This type can be customized to fit a local resource type.</td> </tr> <tr> <td>7</td> <td>CUSTOM2</td> <td>Custom resource</td> <td>This type can be customized to fit a local resource type.</td> </tr> <tr> <td>8</td> <td>CUSTOM3</td> <td>Custom resource</td> <td>This type can be customized to fit a local resource type.</td> </tr> </tbody> </table> <p>Resource Recommender Configuration Page</p>	Index	Type	Display name	Description	1	DATABASE	Suggested database	A collection of data organized to optimize search and retrieval of information, typically focused on a specific topic or research area.	2	LIBRARY_GUIDE	Library guide	A subject guide, course guide, information portal, or a set of research help pages created by the library to help library users.	3	WEBSITE	Suggested Website	A group of World Wide Web pages, made available online by an individual, organization, educational institution or government.	4	PERSON	Suggested librarian	A reference desk person, subject specialist or librarian able to assist users in specific subject areas.	5	LIBRARY_INFORMATION	Library information	Information about a library, including its opening hours and location.	6	CUSTOM1	Custom resource	This type can be customized to fit a local resource type.	7	CUSTOM2	Custom resource	This type can be customized to fit a local resource type.	8	CUSTOM3	Custom resource	This type can be customized to fit a local resource type.
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Resource Recommender Codes code table (new)	This table defines the display labels that appear in Primo VE for Resource Recommender.																																				
Resource Recommender Data Labels code table (new)	This table defines the display labels that are associated with each suggestion that you define on the Resource Recommender Configuration page.																																				

Featured Results

This functionality allows your institution to include additional relevant records that may not be included in a search scope that users had used in their original search query. Here are some examples:

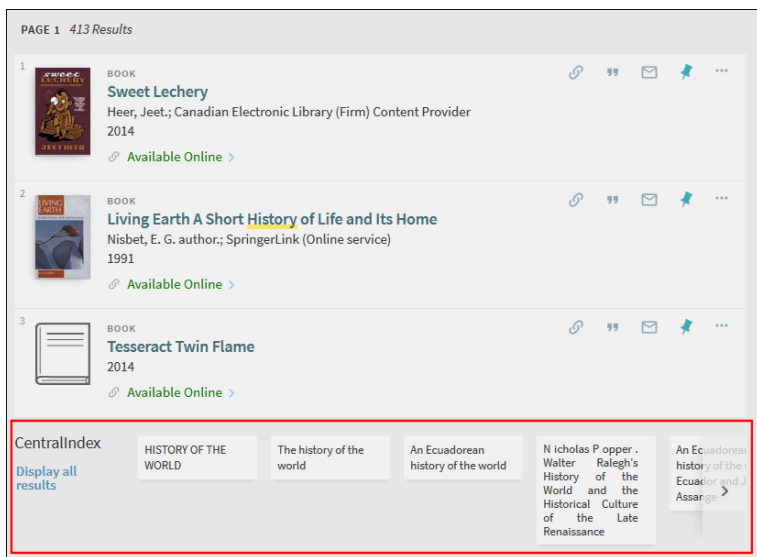
- Include featured articles from Primo Central in a search profile that only pertains to local records.
- Include featured images in search results in which images were excluded. For greater emphasis, you can include featured images to search results in which images are already included.

- Include featured collections in search results in which the collection would not normally be included.

When this functionality is enabled, a Featured Results Bar will appear after the third record on the first page of the brief results. Within the bar, the highest ranked records appear first. The bar will not display after selecting a facet or navigating to another page in the results. If the original query does not return results, the system will not display any featured results.

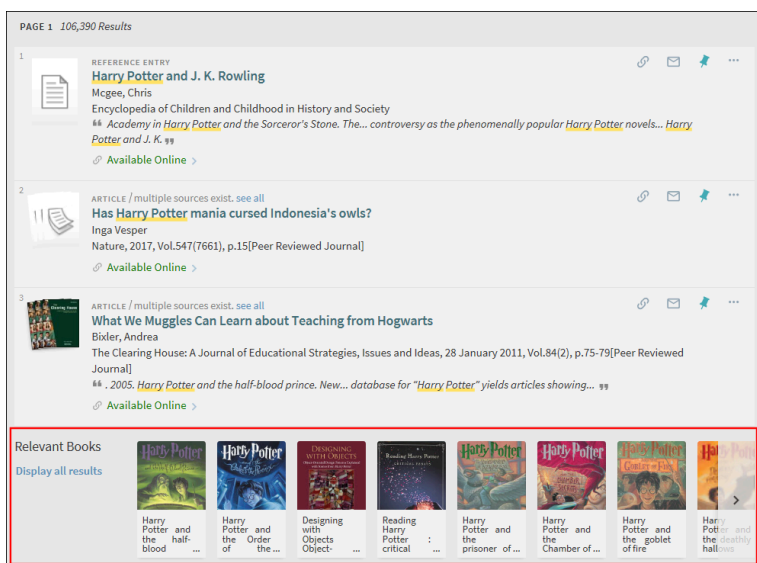
The format of the Featured Results Bar can be configured to appear as follows on the Brief Results page for initial search queries:

- List – The Featured Results Bar in the new UI displays up to 10 items that include only the title. Users can scroll left or right to see the items in the horizontal list. If the title exceeds seven rows, an ellipsis is added to the end of the seventh row to indicate that the title is incomplete.



List Format

- Thumbnail – The Featured Results Bar in the new UI displays up to 10 items that include a constant size thumbnail with the title below it. Users can scroll left or right to see the items in the horizontal list. If the title exceeds four rows, an ellipsis is added to the end of the fourth row to indicate that the title is incomplete.



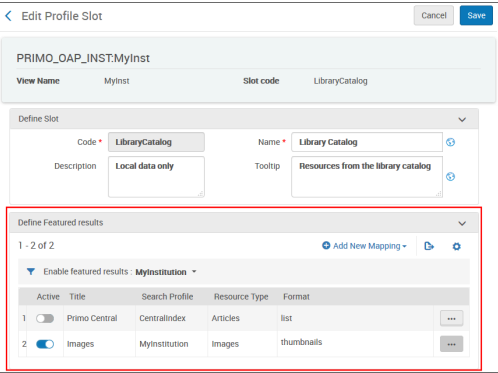
Thumbnail Format

From the Featured Results bar, users can perform the following operations:

- Click the item to display the title's record.
- Click **Display all results** to see a list of all featured titles on the Advanced Search page.
- Scroll horizontally to see up to 10 items in the Featured Results Bar.

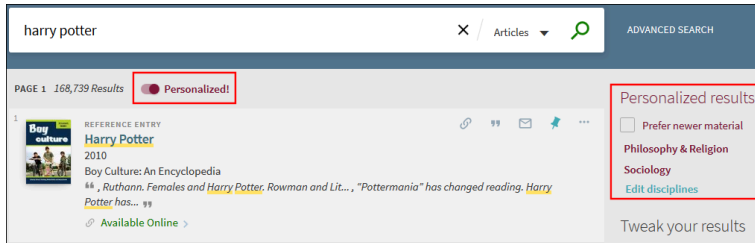
Configuration Options

The following table lists the configuration options that are used to configure this functionality.

Featured Results	
Page	Description
<p>Define Featured Results section (new)</p>	<p>This section has been added to the Edit Profile Slot page under the Search Profile Slot tab in the View Configuration Wizard (Configuration Menu > Discovery > Display Configuration > Configure Views). It allows you to define featured results mappings for the search profile slot that you are editing. Each mapping row allows you to specify a search profile, type of resource, and the bar's format. Only one mapping can be active at a time for a search profile slot.</p>  <p>Define Featured Results Section</p> <p>For more information, see Adding Featured Results to a Search Profile Slot.</p>
<p>Featured Results Labels code table (new)</p>	<p>This table defines the common display labels that are associated with the Featured Results Bar.</p>
<p>View Labels code table</p>	<p>Using the following format, the system creates a display label for each mapping's title:</p> <pre><inst>:<view>.nui.featuredresult.<slot>.<resource_type>.<title></pre>

Personalized Results

The Personalized Results feature boosts the rankings of Primo Central records that match the users personalized settings.



Personalized Results Enabled in Primo VE

The Personalized results section lists the active preferences and allows users to remove selected disciplines, edit selected disciplines, and give preference to newer material.

Setting the Personalized Results Preferences

The Personalize the Results dialog box allows users to set their discipline preferences, which are retained during the session for guests and unsigned users and between sessions for signed-in users.

Personalize the results

You can help us provide you with better result matches by focusing the search on your preferred disciplines. Please select up to 5 disciplines.

<input type="checkbox"/> Agriculture & Forestry	<input type="checkbox"/> Nursing
<input type="checkbox"/> Arts & Humanities	<input type="checkbox"/> Psychology
<input type="checkbox"/> History & Archaeology	<input type="checkbox"/> Sciences
<input type="checkbox"/> Languages & Literature	<input type="checkbox"/> Biology
<input type="checkbox"/> Philosophy & Religion	<input type="checkbox"/> Chemistry
<input type="checkbox"/> Business & Economics	<input type="checkbox"/> Earth Sciences
<input type="checkbox"/> Engineering	<input type="checkbox"/> Mathematics
<input type="checkbox"/> Computer Science	<input type="checkbox"/> Physics
<input type="checkbox"/> Materials Science	<input type="checkbox"/> Social Sciences
<input type="checkbox"/> Law	<input type="checkbox"/> Anthropology
<input type="checkbox"/> Library & Information Science	<input type="checkbox"/> Education
<input type="checkbox"/> Medicine	<input type="checkbox"/> Geography
<input type="checkbox"/> Diet & Clinical Nutrition	<input type="checkbox"/> Journalism & Communications
<input type="checkbox"/> Pharmacy, Therapeutics & Pharmacology	<input type="checkbox"/> Political Sciences
	<input type="checkbox"/> Public Health
	<input type="checkbox"/> Sociology
	<input type="checkbox"/> Statistics
	<input type="checkbox"/> Veterinary Medicine

CANCEL PERSONALIZE IT!

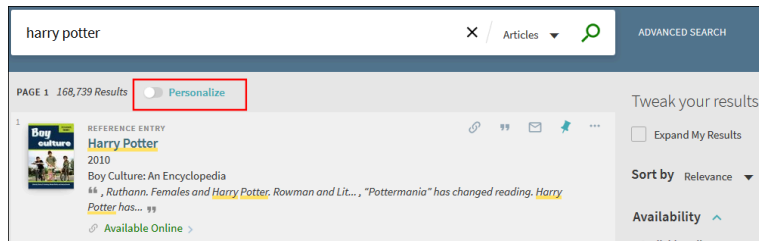
Personalize the Results Dialog Box

Note

The list of disciplines are defined by Primo Central, but they can be translated locally with the Personalize Your Results Disciplines code table.

To enable personalized settings in Primo VE:

1. Perform a search within a search scope that includes Primo Central records.

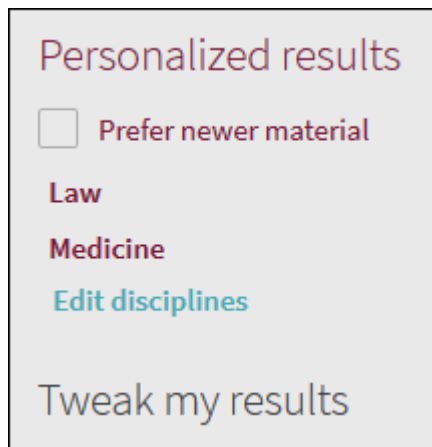


Enable Personalized Results

2. Click the **Personalize** button that appears above the list of results.
3. In the Personalize the results dialog box, select up to five disciplines.
4. Click **PERSONALIZE IT**.

To edit personalized settings in Primo VE:

1. Perform a search within a search scope that includes Primo Central records to display the Personalized results section.




Personalized Results Section

2. If you want to give preference to newer records, select the **Prefer new material** check box.
3. Click **Edit** in the Personalize the results section to open the Personalize the results dialog box.

Personalize the results

You can help us provide you with better result matches by focusing the search on your preferred disciplines. Please select up to 5 disciplines.

<input type="checkbox"/> Agriculture & Forestry	<input type="checkbox"/> Nursing
<input type="checkbox"/> Arts & Humanities	<input type="checkbox"/> Psychology
<input type="checkbox"/> History & Archaeology	<input type="checkbox"/> Sciences
<input type="checkbox"/> Languages & Literature	<input type="checkbox"/> Biology
<input type="checkbox"/> Philosophy & Religion	<input type="checkbox"/> Chemistry
<input type="checkbox"/> Business & Economics	<input type="checkbox"/> Earth Sciences
<input type="checkbox"/> Engineering	<input type="checkbox"/> Mathematics
<input type="checkbox"/> Computer Science	<input type="checkbox"/> Physics
<input type="checkbox"/> Materials Science	<input type="checkbox"/> Social Sciences
<input checked="" type="checkbox"/> Law	<input type="checkbox"/> Anthropology
<input type="checkbox"/> Library & Information Science	<input type="checkbox"/> Education
<input checked="" type="checkbox"/> Medicine	<input type="checkbox"/> Geography
<input type="checkbox"/> Diet & Clinical Nutrition	<input type="checkbox"/> Journalism & Communications
<input type="checkbox"/> Pharmacy, Therapeutics & Pharmacology	<input type="checkbox"/> Political Sciences
	<input type="checkbox"/> Public Health
	<input type="checkbox"/> Sociology
	<input type="checkbox"/> Statistics
	<input type="checkbox"/> Veterinary Medicine

 **RESET PERSONALIZATION** CANCEL SAVE CHANGES

Personalize the Results Dialog Box

- In the Personalize the results dialog box, select up to five disciplines.
- Click **SAVE CHANGES**.

Configuration Options

The following table lists the configuration options that are used to configure this functionality.

Personalized Results

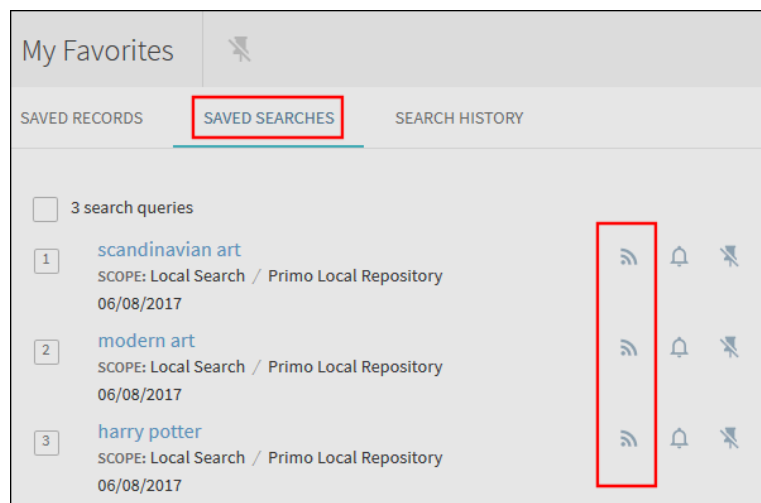
Page	Description
Enable the 'Personalize Your Results' Service field (new)	This field has been added to the General tab in the View Configuration Wizard (Configuration Menu > Discovery > Display Configuration > Configure Views). When selected, it enables the Personalize Your Results option in Primo VE.
Personalize Your Results Labels code table (new)	This table contains all labels used by the Personalize Your Results area on the Brief Results page and the Personalize Your Results dialog box.
Personalize Your Results Disciplines code table (new)	This table allows you to translate the disciplines and modify display names and categories, which are defined by Primo Central.
Error Messages Labels code table	The following code displays a message when the maximum number of disciplines has been selected in Primo VE: <code>nui.validation.pyr.maxDisciplines – You have reached the maximum number of disciplines. Please select up to five.</code>

Support of RSS Feeds in Results

Rich Site Summary (RSS) functionality allows Primo VE users to be informed of updates to records in their saved searches.

To enable RSS for a saved search:

1. Open the My Favorites page by clicking the My Favorites button in the top menu of the new UI.
2. On the My Favorites page, select the Saved Searches tab.



RSS Selection on Saved Searches Tab

3. Click the RSS button



for the saved search that you want to monitor.

4. Subscribe to the feed if your browser has an RSS reader.

Configuration Options

No configuration is necessary to enable this functionality. The following code has been added to the Favorites Labels code table to allow you to modify or translate the tooltip for the RSS button:

```
nui.favorites.search.rss.tooltip-Set an RSS for this search
```

Loading Records from External Sources (Dublin Core)

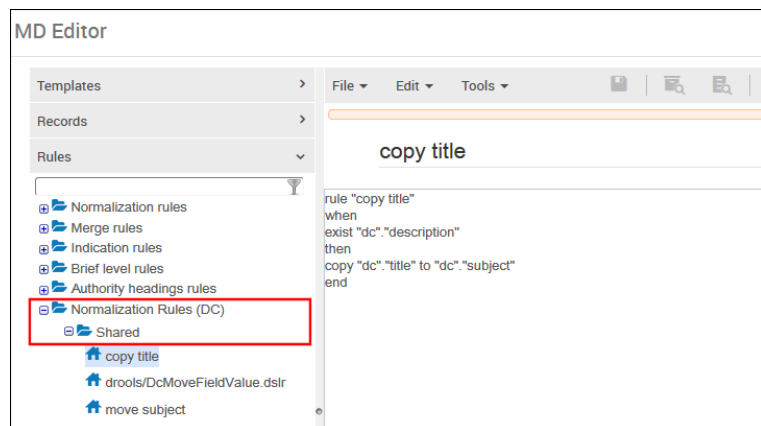
This enhancement allows you to import records from external sources into Primo VE for discovery in your local catalog. Currently, only Dublin Core records are supported.

Note

These records are loaded into Primo VE directly and cannot be searched and viewed using Alma's repository search.

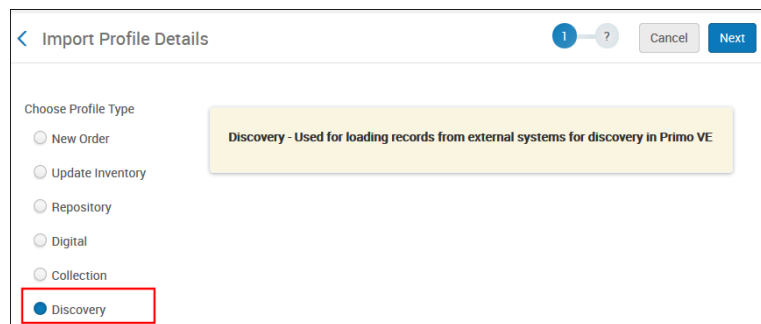
This configuration uses the following workflow, which incorporates existing Alma configurations and modifications needed to import and normalize Dublin Core records into Primo VE:

1. If needed, define additional normalization rules in the MD Editor. The Normalization Rules (DC) folder has been added to the Rules section in the MD Editor to allow you customize the normalization of DC source records for Primo VE. For more information, see [Configuring Normalization Rules for Primo VE](#).



Rules Section in the MD Editor

2. Create a Qualified Dublin Core normalization rules task list. For more information, see [Creating a Normalization Rule Task List](#).
3. Create an import profile ([Resources > Manage Import Profiles](#)) for the external data source. The **Discovery** import profile type has been added to support the loading of external sources into Primo VE. For more information, see [Configuring Import Profiles for Primo VE](#).

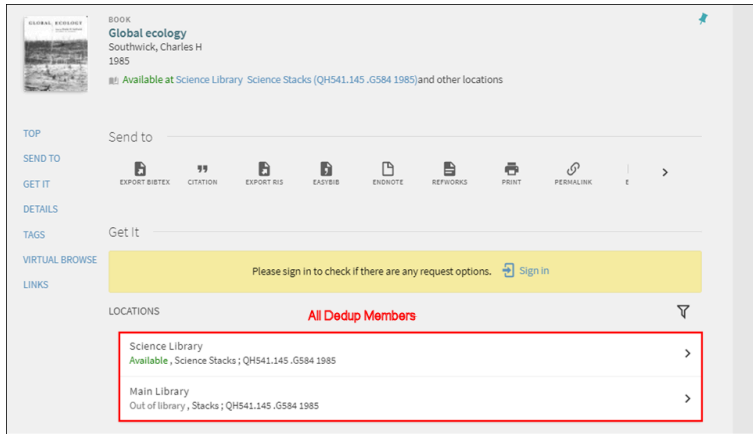


Add New Import Profile for Discovery

4. Run and monitor the import profile.

Calculate Availability for all Dedup Members

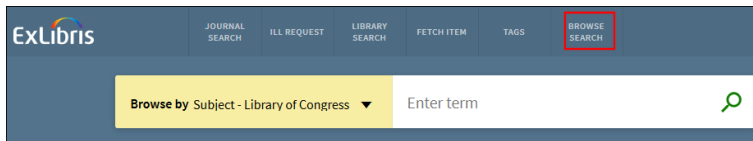
Previously, in order to display dedup record information in the full record page (such as location), it depended on whether the other Dedup members also appeared in the results set. This has been changed so that users can see Dedup information for other Dedup members from a record's full display regardless of the search results, which could be a deep link to a Dedup member.



All Dedup Members Shown

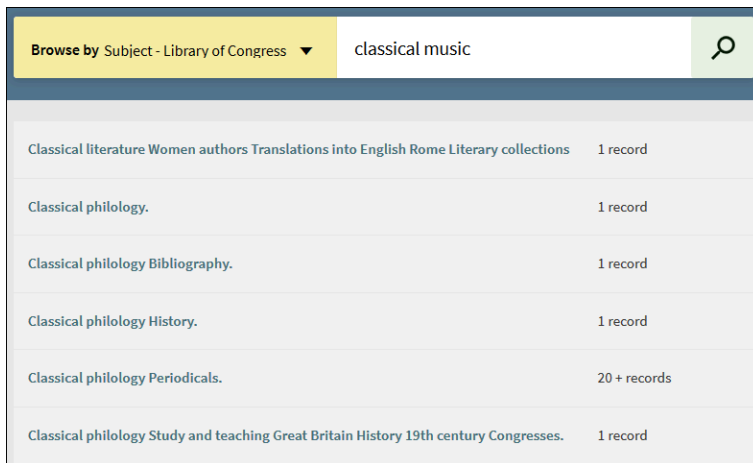
Browse Search - by Subject

This is an additional enhancement to the browse functionality that was introduced in the September release which included browsing by Author, Title, and Call Numbers, now adding the ability to browse by subject in Primo VE. A Subject browse search returns an alphabetical list of headings (based on a selected vocabulary). Each item in the results list returns a list of related records.



Browse Page in Primo VE

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



Browse by Subject Example

Configuration Options

The following table describes the configuration that supports this functionality.

Subject Browse Configuration

Element	Description
Links Menu tab in View Configuration	Enables/Disables the Browse link that displays on the Main menu in Primo VE. You can define up to five subject browse types.
Browse Search Labels code table	<p>Defines the display labels that are associated with browse.</p> <p>After assigning a subject vocabulary in the Links Menu tab, you may want to edit its associated display label:</p> <ul style="list-style-type: none"> • <code>nui.browse.subject.1</code> - subject • <code>nui.browse.subject.2</code> - subject • <code>nui.browse.subject.3</code> - subject • <code>nui.browse.subject.4</code> - subject • <code>nui.browse.subject.5</code> - subject

Login via Email Link

Primo VE now supports the existing Email Login functionality that provides one-time authentication (without having to sign in to Primo VE) by clicking a link received in an email. For more details, see [Primo Login Using Email](#).

To configure this functionality for use in Primo VE:

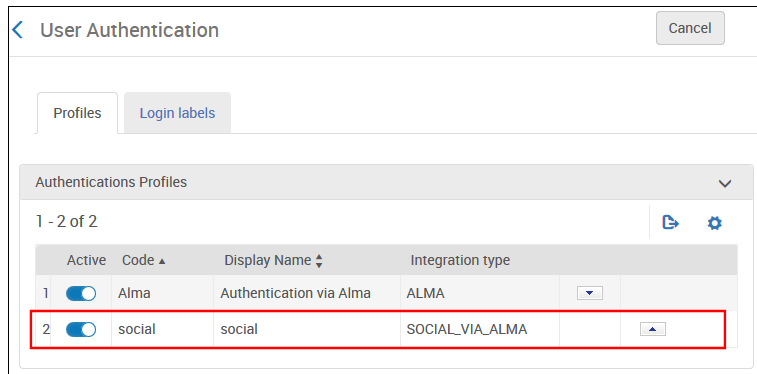
1. Define an Email Login integration profile. For more information, see [Social Login](#).

The screenshot shows the 'Integration Profile' configuration form. At the top, there are navigation elements: a back arrow, a progress indicator with steps 1 and 2 (step 1 is active), and 'Cancel' and 'Next' buttons. The form contains the following fields:

- Code ***:
- Name ***:
- Integration Type ***: (dropdown menu)
- System ***: (dropdown menu)
- Default**:
- Description**:

Social/Email Login Integration Profile

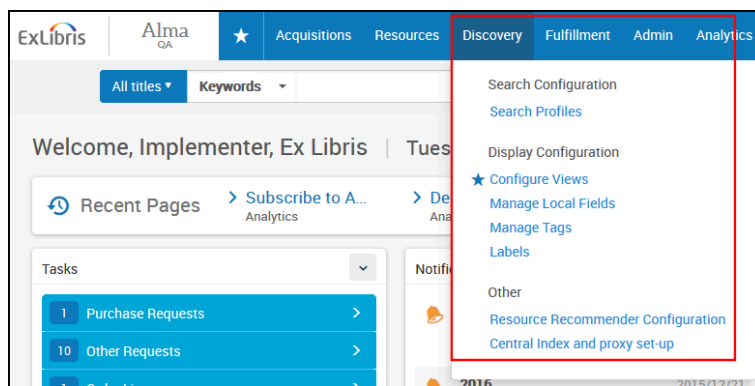
2. Enable the Email authentication method in Primo VE. For more information, see [Configuring User Authentication](#).



User Authentication (Primo VE)

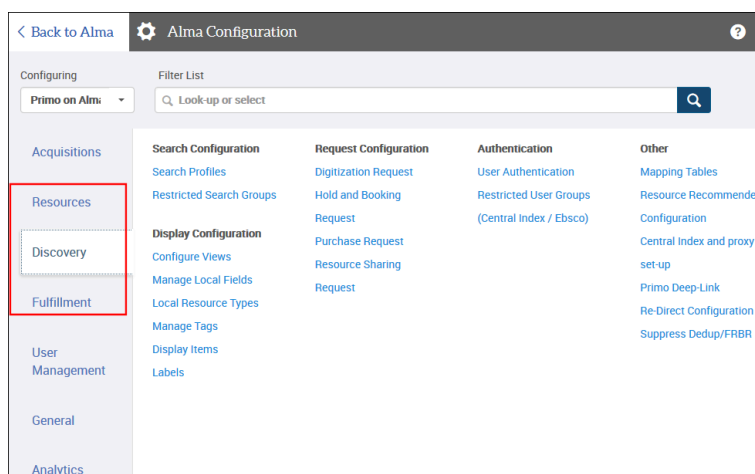
Link to Discovery from Alma

The Discovery menu has been added to the main Alma page in the new Alma UI to allow quick access to some of the more commonly used configuration functions. The full set of configuration functions are still available in the Discovery configuration menu on the Alma Configuration page. As before, only staff users with the Discovery Admin role will see the menu in both the main Alma and Alma Configuration pages.



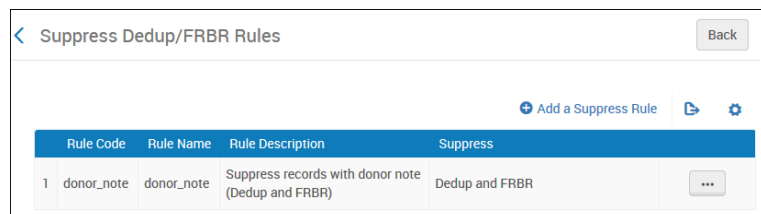
New Discovery Menu on Main Page in Alma

As part of aligning the menus to the new Alma UI, the location of the Discovery configuration menu has been moved (in both the old and new UI) between the Resources and Fulfillment menus on the Alma Configuration page.



Suppress Groups of Records from Dedup/FRBR

The Suppress Dedup/FRBR Rules page ([Configuration Menu > Discovery > Suppress Dedup/FRBR](#)) has been added to create suppression rules (which can be based on location, a local field, or some other metadata, such as genre or language) that prevent groups of records from being FRBRized and deduped for discovery in Primo VE. For more details, see [Suppressing Groups of Records from Dedup/FRBR](#).



Rule Code	Rule Name	Rule Description	Suppress
1	donor_note	Suppress records with donor note (Dedup and FRBR)	Dedup and FRBR

Suppress Dedup/FRBR Rules Page

Resolved Issues

The following issues were resolved in this release:

The format of dates displayed in Primo VE (such as in My Account, saved searches, and search history) is now aligned with Alma's date format, which is defined by the `system_date_format` customer parameter. Previously, the format was mm/dd/yyyy.

Next Month Sneak Peek

- Digital collection discovery interface – Enables users to navigate the hierarchy of collections and sub-collections intuitively in order to locate and view their associated items managed in Alma.
- Database search interface – Enables patrons to search for databases to which their institution subscribes.
- Timeout behavior changes – Allows the institution to define separate timeout periods for signed-in and guest users.
- Further optimization of the external data source workflow – Includes simplified access from within the Discovery menu and a Drools test utility for external records.