



Primo Version 4.0

Condensed Highlights

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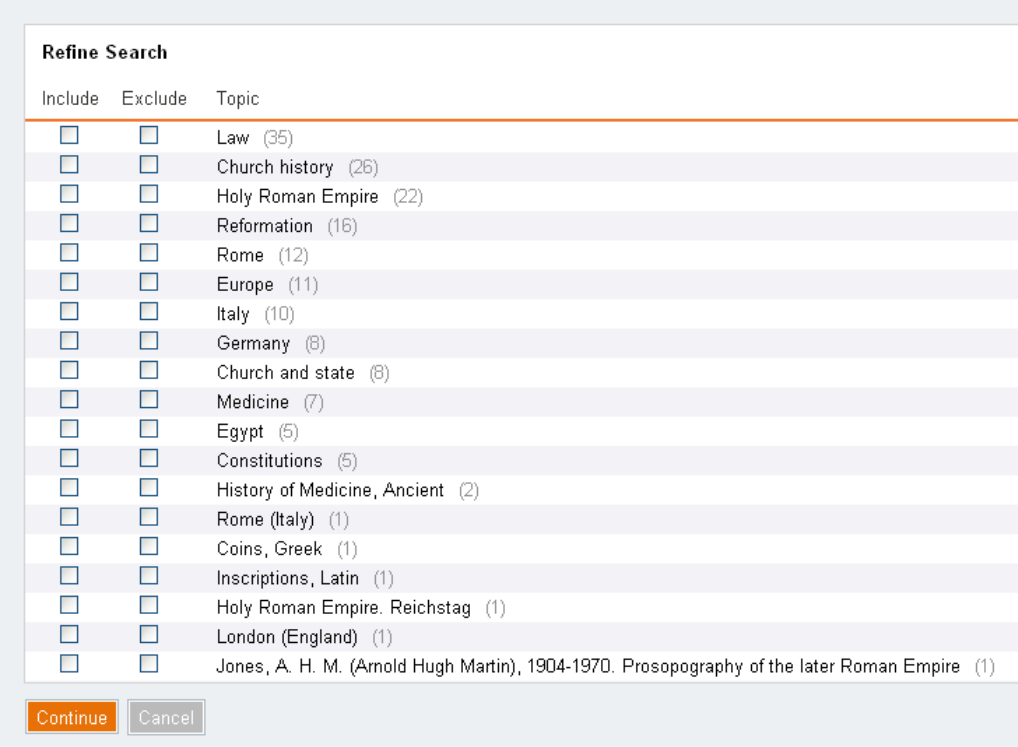
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New Front End Functionality

Multiple Selection of Facets

A new feature enabling users to select multiple facet values has been added. Check boxes are now part of the facets display. When a user clicks on a check box the system will display a pop-up with all the facet values visible and the ability to include or exclude multiple facet values.



The screenshot shows a 'Refine Search' dialog box with a table of facet values. Each row has two checkboxes, one for 'Include' and one for 'Exclude', followed by the facet name and its count in parentheses. At the bottom, there are 'Continue' and 'Cancel' buttons.

Include	Exclude	Topic
<input type="checkbox"/>	<input type="checkbox"/>	Law (35)
<input type="checkbox"/>	<input type="checkbox"/>	Church history (26)
<input type="checkbox"/>	<input type="checkbox"/>	Holy Roman Empire (22)
<input type="checkbox"/>	<input type="checkbox"/>	Reformation (16)
<input type="checkbox"/>	<input type="checkbox"/>	Rome (12)
<input type="checkbox"/>	<input type="checkbox"/>	Europe (11)
<input type="checkbox"/>	<input type="checkbox"/>	Italy (10)
<input type="checkbox"/>	<input type="checkbox"/>	Germany (8)
<input type="checkbox"/>	<input type="checkbox"/>	Church and state (8)
<input type="checkbox"/>	<input type="checkbox"/>	Medicine (7)
<input type="checkbox"/>	<input type="checkbox"/>	Egypt (5)
<input type="checkbox"/>	<input type="checkbox"/>	Constitutions (5)
<input type="checkbox"/>	<input type="checkbox"/>	History of Medicine, Ancient (2)
<input type="checkbox"/>	<input type="checkbox"/>	Rome (Italy) (1)
<input type="checkbox"/>	<input type="checkbox"/>	Coins, Greek (1)
<input type="checkbox"/>	<input type="checkbox"/>	Inscriptions, Latin (1)
<input type="checkbox"/>	<input type="checkbox"/>	Holy Roman Empire. Reichstag (1)
<input type="checkbox"/>	<input type="checkbox"/>	London (England) (1)
<input type="checkbox"/>	<input type="checkbox"/>	Jones, A. H. M. (Arnold Hugh Martin), 1904-1970. Prosopography of the later Roman Empire (1)

Note that it is still possible to select a single facet value and invoke the filter immediately by clicking on the facet text itself rather than the check box.

The breadcrumb has been changed to indicate an “exclude” by expressing this via a strikethrough as can be seen for *Philosophy* and *Music* in the example below.

31 Results for **Primo Local Repository** Sorted by: Relevance ▾

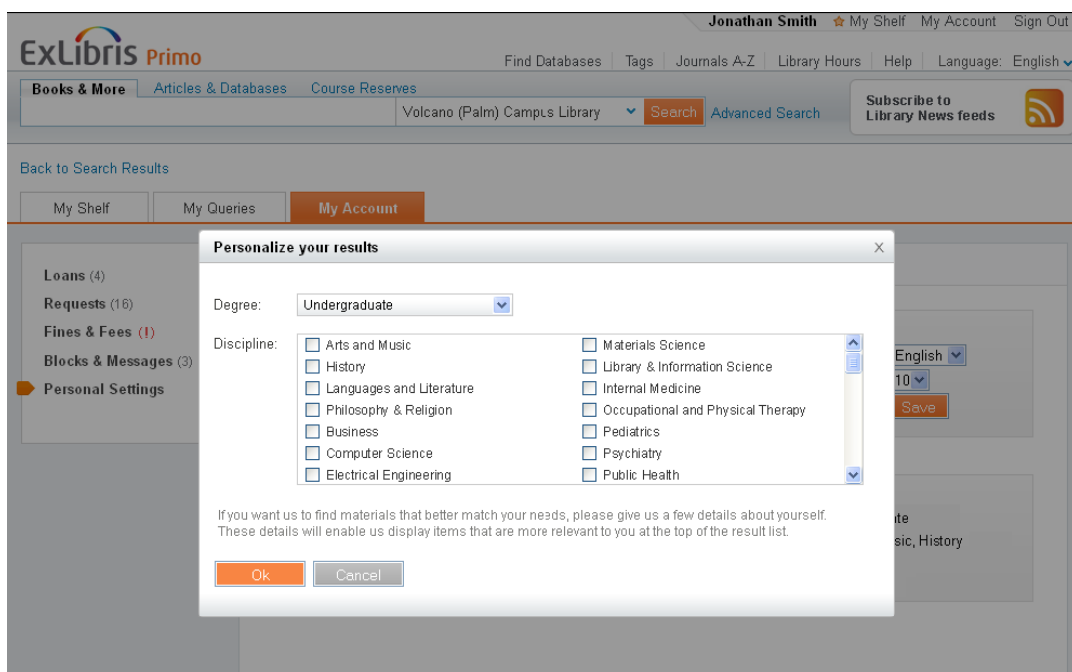
Refined by: topic: **Particles (Nuclear physics)** x **Quantum theory** x **Nuclear physics** x ~~**Philosophy**~~ x ~~**Music**~~ x

The new multiple selection of facets feature is the result of the customer enhancement voting where priority is given to developments voted as important to the Primo community.

Personalized Ranking

This enhancement enables end-users to sign up to have Primo Central rank results based on end-user information.

The personalized ranking will be tailored towards information about the user's academic degree and discipline, if provided by the user. This is supported by a pop-up screen appearing at the sign-in stage. The user decides whether or not to provide the information. The information, if provided, is kept as part of the user profile and can be updated by the user.

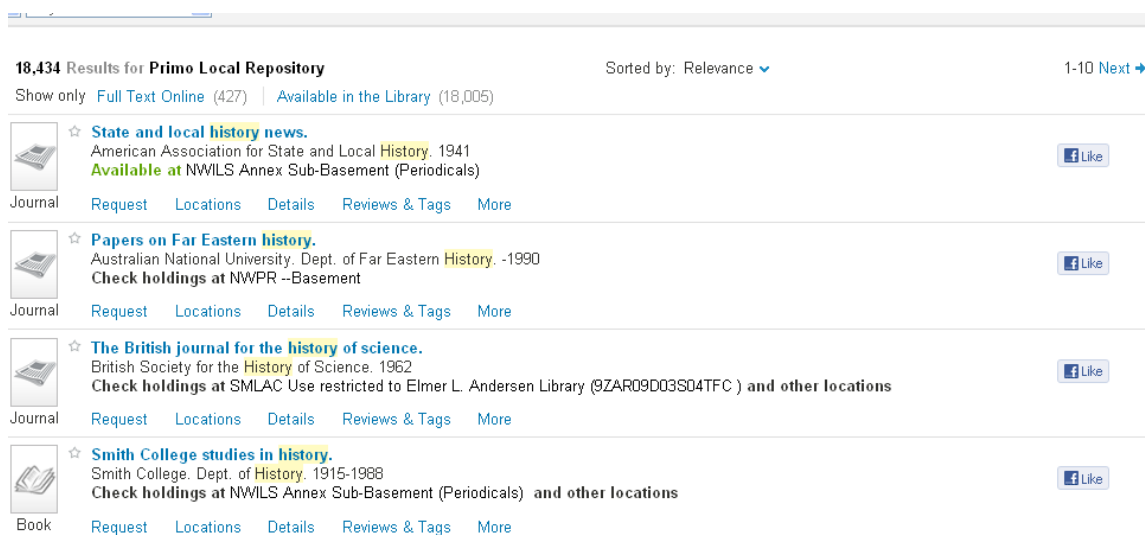


Adding Facebook's "Like" option to the Brief Results

The Facebook "Like" button lets users share content with their friends via Facebook. When the user clicks the "Like" button, a story appears in the user's friends' Facebook News Feed with a link back to Primo.

The Facebook "Like" button is added to every result on the brief results page. It will be visible only when the end-user hovers over the results.

The link in the user's Facebook News Feed will be to the Primo full display. The option is configurable per view.



The screenshot displays a search results page for 'Primo Local Repository'. At the top, it shows '18,434 Results for Primo Local Repository' and 'Sorted by: Relevance'. Below this, there are filters for 'Full Text Online (427)' and 'Available in the Library (18,005)'. The results list includes:

- State and local history news.** American Association for State and Local History. 1941. Available at NWILS Annex Sub-Basement (Periodicals). Journal. Includes a 'Like' button.
- Papers on Far Eastern history.** Australian National University. Dept. of Far Eastern History. -1990. Check holdings at NWPR --Basement. Journal. Includes a 'Like' button.
- The British journal for the history of science.** British Society for the History of Science. 1962. Check holdings at SMLAC Use restricted to Elmer L. Andersen Library (9ZAR09D03S04TFC) and other locations. Journal. Includes a 'Like' button.
- Smith College studies in history.** Smith College. Dept. of History. 1915-1988. Check holdings at NWILS Annex Sub-Basement (Periodicals) and other locations. Book. Includes a 'Like' button.

Search by Date Range

The purpose of this enhancement is to enable end-users to search by a specified date range in Advanced Search. In Version 3 of Primo it was possible to search by pre-defined date ranges in Advanced Search. A new option to search by a date range entered by the user has now been added.

The date range search has the following options:

1. A date range of years or complete dates
2. Open ended dates – if the user enters only a “from” date Primo will search for records from the date specified and later. E.g.:
 - a. From 1990
3. Open start date – if the user only enters a “to” date Primo will search for all records earlier and including the specified date.
 - a. To 1999
4. Specific date – for a specific date the user should enter the same date in both the “from” and “to” fields. E.g:
 - a. From 1990 to 1990
5. BCE dates. A BCE date should be indicated by a “minus” sign. E.g:
 - a. From -89 to -100

This new feature is the result of the customer enhancement voting.

Export records in RIS format

In version 4 end users will have the option to export records in RIS format. Today Primo integrates with web versions of EndNote and RefWorks. The benefit of this new development is a smooth interaction with desktop applications for reference management tools such as EndNote, RefWorks, RefMan, Citavi, etc. In addition, this also adds a better integration with tools such as Mendeley.

This new feature is the result of the customer enhancement voting.

Customizable fields for hyperlink search

Giving the end users the option of using a specific relevant record as a starting point for further, related records is a powerful capability which already exists within Primo today. It is possible for end users to click on author names or subjects from full display to perform a new search for those values as new field-specific query terms. In Primo version 4 libraries will be able to customize an addition ten fields of their own choice for hyperlink search, for example series title, call numbers etc.

This new feature is the result of the customer enhancement voting. The feature was developed for Version 4 but was downgraded to Version 3.1.2 and released then.

Add Page to E-Shelf

The purpose of this enhancement is to enable end-users to save an entire results page to their e-Shelf.

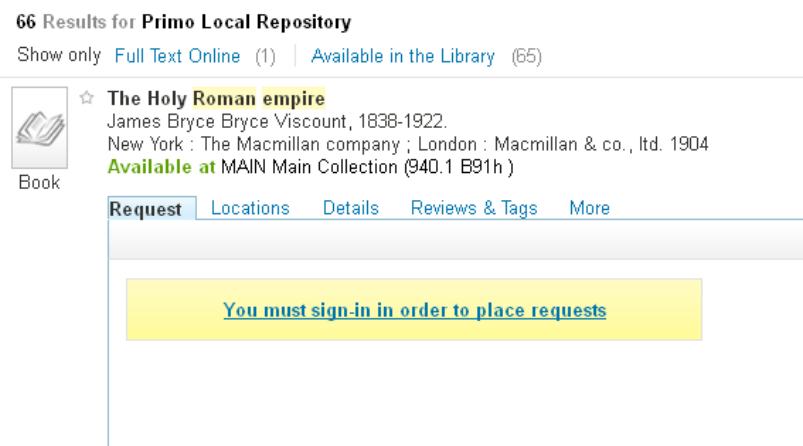
Users can now save the all results on the results page to their e-Shelf. The new option, as well as the RSS and Save query options can now be defined to display under the facets display (as in V3) or at the top.

The screenshot displays the ExLibris Primo search interface. At the top, the logo 'ExLibris Primo' is visible. Below it, there are tabs for 'Local Search' and 'Remote Search'. A search bar contains the text 'history'. To the right of the search bar, there is a dropdown menu set to 'Primo Local Repository', a 'Search' button, and a link to 'Advanced Search'. Below the search bar, there are three dropdown menus: 'All items', 'that contain my query words', and 'anywhere in the record'. On the left side, there are three options: 'rss', 'Save query', and 'Add page to e-Shelf'. Below these options, there is a 'Show only' section with two items: 'Full Text Online (427)' and 'Available in the Library (18,005)'. Further down, there is a 'Refine My Results' section with a 'Topic' filter and several options: 'United States (1,594)', 'Natural history (196)', 'History (184)', 'Economic history (170)', and 'Music (166)'. The main content area shows '18,434 Results for Primo Local Repository'. Below this, there are three search results, each with a 'Journal' icon and a 'Request' button. The first result is 'State and local history news.' by the American Association for State and Local History, 1941, available at NWLS Annex Sub-Basement (Periodicals). The second result is 'Papers on Far Eastern history.' by the Australian National University, Dept. of Far Eastern History, -1990, with a note to check holdings at NWPR --Basement. The third result is 'The British journal for the history of science.' by the British Society for the History of Science, 1962.


This new feature is the result of the customer enhancement voting.

Enable sign-in directly from record

In Primo Version 3 an unauthenticated user had to use the default 'Sign in' link from the Primo top menu. This would re-execute the search, and the user could potentially lose the record in focus. This has now been changed so that a user wishing to request a record is now able to sign in directly from the desired record:



66 Results for **Primo Local Repository**
Show only [Full Text Online](#) (1) | [Available in the Library](#) (65)

 ☆ **The Holy Roman empire**
James Bryce Bryce Viscount, 1838-1922.
New York : The Macmillan company ; London : Macmillan & co., ltd. 1904
Available at MAIN Main Collection (940.1 B91h)

[Request](#) [Locations](#) [Details](#) [Reviews & Tags](#) [More](#)

[You must sign-in in order to place requests](#)

In the example above the text 'You must sign-in in order to place requests' is a link to the login screen. After signing in the user will stay on the record in focus and can perform the hold request action.

This new feature is the result of the customer enhancement voting. The feature was developed for Version 4 but was downgraded to Version 3.1.2 and released then.

New Back Office Functionality

Multi-tenancy

The purpose of this group of features is to enable institutions in a multi-tenant (i.e. multi-institution) environment to work more independently of each other in the Primo Back office.

The Back Office enhancements include the following main enhancements:

- Most configuration elements can now be associated with an institution level and administered by institution level staff.
- It is possible to deploy institutional configuration separately
- It is possible to create more reports per institution
- It is possible to export and import institutional configuration separately
- Pipes can run in parallel

Staff authorizations

As in Version 3, staff can be associated either with a specific institution (“Institution level staff”) or with all institutions (“Customer level staff”).

Institution level staff can manage configuration that belongs to their institution as defined by their role. Institution level staff can also view—but not update—customer level configuration.

Customer level staff can manage the configurations of all institutions as well as manage customer level configuration.

- Only Code and Mapping tables that can be configured at the institution level will display to institution level staff.
- Only Customer level Staff Admin user will be able to:
 - Execute processes and run Cleanup procedures
 - Configure General and Search engine configuration
 - Run all deploys

Comments and Date Stamp in Normalization rules

The purpose of this enhancement is to enable customers to keep better track of when and why changes were made to the Normalization Rules sets.

It is now possible to add a comment to the rules of a PNX field.

> **Advanced Normalization Set Editor**

Normalization Rules Set: Section: Field:

Normalization Rules for field type in PNX Section display in Normalization rules set Aleph_nr

Description: Basic
[Enable all rules](#) | [Disable all rules](#)

Last Updated By: ExlibrisSupport At: 2011-12-06 15:09:13.0

Comments:

Version: 4

[Go to bottom of page](#)

The comments and now also the last updated date now displays in the ‘Manage Normalization Rules’ page.

These features were developed for Version 4 but were downgraded to Version 3.1 and released then.

Reports Enhancements

The purpose of this enhancement is to improve report functionality. The following enhancements to reports were added:

1. It is now possible to export BIRT reports in XML format.
2. The institution drop-down in all reports will be automatically filtered to the institution to which the staff belongs (in case of Institution level staff).
3. Many more reports are now available at the institution level