Primo Quarterly Update

2020 Q2 - Primo Product Team
Best Practices During COVID-19

- **Best Practices for the Ex Libris Community During COVID-19**
- Documents and Presentations
- Q&A
Highlights

- Improved Sticky Facets Behavior
- Support Language Configuration for Voice Search Assistant
- Splitting Audio Visual Facet in CDI Searches
- Efficient workflow - Delete and Reload Pipe
- Database Search – Improved Display of Subcategories
- Primo VE Updates
Primo & Primo VE Release Schedule

- **Primo May 2020**
  
<table>
<thead>
<tr>
<th>Quarterly Release</th>
<th>MT Sandbox</th>
<th>TC</th>
<th>MT Production</th>
<th>Local</th>
</tr>
</thead>
</table>

- **Primo VE Release Schedule**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>April 2020</td>
<td>March 22, 2020</td>
<td>April 5, 2020</td>
<td>N/A</td>
<td>In light of the Coronavirus (COVID19) pandemic, and in consultation with the user groups, Ex Libris will not release this release in order to allow libraries to focus on their operational preparations and activities.</td>
</tr>
<tr>
<td>May 2020</td>
<td>April 5, 2020</td>
<td>May 3, 2020</td>
<td>May 10, 2020</td>
<td>The Sandbox release has been moved up by 2 weeks in order to allow libraries more time to review and evaluate the changes in this release.</td>
</tr>
<tr>
<td>June 2020</td>
<td>May 24, 2020</td>
<td>June 7, 2020</td>
<td>June 14, 2020</td>
<td></td>
</tr>
</tbody>
</table>
Improved Sticky Facets Behavior

• New button "Remember all filters" in the Active Filters section
• Allow users to apply persistence to all active filters for the entire session
• Increasing visibility of sticky facets (not only by hovering on active filter)

*NERS ID 6125 Coming from Ideas Exchange: Make Facets Sticky by Default, Improve Visibility of Sticky Facets and Keep search preferences between searches
Improved Sticky Facets Behavior

• Adding indication in the URL to mark the sticky filters
  • Allow users to reuse the URL later and retain the persistent filters in another search session
  • Allow library to guide users with specific filters in the entire sessions e.g. online resources

https://MyUniv.alma.exlibrisgroup.com/discovery/search?
query=any,contains,test&tab=LibraryCatalog&search_scope=MyInstitution&vid=PRIMO_OAP_INST:Alma&facet=tlevel,include,online_resources,s,1&_infacet=tlevel,exclude,available_p,1,1k

• Reset Filters option in the Active Filters and the main menu New Search option were changed to reset the sticky facets

*This option is used as a New Search rather than as a Library Search navigation*
Efficient workflow - Delete and Reload Pipe

- Adding option to use the same initial Start Harvest Date
- Once checking “Use Static Date” the library can automate its data reload workflow
Support Language Configuration for Voice Search Assistant

• Configure the list of supported languages and the default language used by the Voice Search Assistant
Database Search – Improved Display of Subcategories

- Users can select a category name to display subcategories in addition to the results list (not only by clicking on the sign > )
Splitting Audio Visual Facet in CDI Searches

- Allows users to filter their audio/visual results separately for CDI searches see Resource Types in CDI

Coming from Ideas Exchange
More updates

• Primo Analytics
  • New Action “Resource recommender appeared” reports on a search that returned a resource recommendation
    • Coming from the Idea Exchange - How often a recommendation is triggered

• New SAML Certificate – annual procedure to renew SAML certificate
Primo VE Updates

**MAY**
- Support Configuration of the Preferred Record for FRBR
- Include Library Names in Location Facet
- Consortia Management – Custom Resource Types Centerally
- Export to Mendeley
- Get It Availability – Support Configuration for “X copy, Y available, Z requests)
- View It From Other Campuses/Libraries

**JUN**
- Support Configuration of the Preferred Record for DEDUP
- Delete & Reload while keeping permalinks
- Enhance Purchase Request Form with preferred material type
- Booking Request – Support Configuration of Booking Resolution
- Add Open Access Indication and Facet for Local Records
- Unsubscribe from Saved Alert Email
Support Configuration of the Preferred Record for FRBR

- Primo VE allows you to define the preferred FRBR record displayed based on the following criteria:
  - Resource type
  - Date
  - Availability

* NERS ID 6230 Coming from Ideas Exchange
Support Configuration of the Preferred Record for FRBR

• For example, you can set the preferred record to be the print version rather than the electronic.
Support Configuration of the Preferred Record for DEDUP

- Primo VE allows you to define the preferred DEDUP record displayed based on the availability

Criteria for the DEDUP preferred record

- Availability
  - None
  - ALMA-P
  - ALMA-E
  - ALMA-D

Coming from Ideas Exchange
Include Library Names in Location Facet

• Allow users to identify the location of an item by displaying the library name with each location in the Location Facet. (relevant in case of repeated location names such as Stacks)
View It from Other Campuses/Libraries

• Allow users to see the available services of other campuses/libraries (for information only – not as links)
• For multi-campus environment:
  • new configuration
  • Display online services from other campuses/libraries
Delete & Reload while keeping permalinks

- You can now reload external data with a new option of “Reload and Delete”, assuming entire set of records is provided for reload
  - Confirmation message appears to clarify that the job will delete existing records that are not provided in the set to reload
- Reload data for existing records will make sure that same permalinks are maintained
CDI – The Central Discovery Index

Ex Libris’ new Central Discovery Index

• More content
• Better and more scalable technology
• Simplified collection activation via Alma/SFX
• No alternative coverage calculation

CDI Rollout status

• 932 Alma customers are CDI enabled
• 59 Institutions switched to production with CDI
• SFX customers enablement will start in late May/June

Questions? Contact us at cdi_info@exlibrisgroup.com

Check out the details on the Knowledge Center
https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation

Coming shortly:
• Best practice for managing your collections in Alma for discovery
• CDI Collection list
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export to Excel</td>
<td></td>
</tr>
<tr>
<td>Improve the Link to Leganto Reading List</td>
<td>when reading lists are in draft mode</td>
</tr>
<tr>
<td>Enhanced Personalization</td>
<td>Show me my recent search scopes</td>
</tr>
<tr>
<td>Allow users direct linking to PDF</td>
<td>using Unpaywall</td>
</tr>
<tr>
<td>Primo VE</td>
<td>Allow multiple conditions per resource type</td>
</tr>
<tr>
<td>Primo VE – Consortia management</td>
<td>define local fields for search/ display centrally</td>
</tr>
</tbody>
</table>
Thank you!

Nili.Natan@exlibrisgroup.com