Primo Quarterly Update

2019 Q2 - Primo Product Team
Highlights

- Contextual relationships
  New ways to discover more

- Collection Discovery
  Enhancements

- Support Localized Links in
  the Main Menu

- Short Permalinks for Records

- Primo Analytics
  Enhancements

- More Primo VE Updates
Upcoming release for Primo and Primo VE

- **April 28th**: Sandbox Release - Primo MT Sandbox
- **May 5th**: Primo TC
- **May 12th**: Production Release - Primo MT Production
- **May 19th**: Primo VE June Sandbox
- **May 26th**: Primo Local
  - Primo General Release available for customers on the FTP server
- **June 2nd**: Primo VE June Production

**Primo Release schedule**
**Primo VE Release schedule**
Contextual Relationships - New Ways to Discover More

Enabling *users to easily discover items in the context of the material they already have found*:

- Contextual Relations include e.g. books → book reviews, chapter → other chapters of the same book, book → chapters
- Links appear in the full view of a record
- Relations are provided and stored by a graph database (as part of CDI)
Contextual Relationships - New Ways to Discover More

• Enable users to link and view related book reviews or chapters from the book
Contextual Relationships - New Ways to Discover More

• Book Chapter -> Chapters
  • Enable users to link and view other chapters from the same book.
Contextual Relationships - New Ways to Discover More

• Rollout
  • Enabled by default
  • Gradual rollout of the relations data

• Future plan: other relationship types will be added over time
Short Permalinks for Records

• Allow users to use shortened URL especially when sending text messages in chat, email..

• Shorten Permalink: `<Primo Domain>/permalink/<key>/<record_ID>`

*NERS ID 5845 also coming from Idea Exchange*
Short Permalinks for Records

• Shorten Permalink

  <Primo Domain>/permalink/<key>/<record_ID>

• Relevant for both local and central index records

• Rollout

  • Enabled by default

  • Customization code is provided to disable it if needed
Enhance Visualization in Collection Discovery (Alma)

- Better promotion of your collections
- Library can manage and select in Alma up to four high quality images to display for the collection or sub-collections
Collection Discovery - Searching within a Collection

• Allow the users search inside the collection and filter relevant Collection's items or relevant Collection's sub-collections (only one level below)

*Coming from Idea Exchange
Support Localized Links in the Main Menu

• Support the option to create separate link per language in the Main Menu (New UI only)

• See Configuring Main Menu Links for the New Primo UI

*From the Idea Exchange
Primo Analytics Enhancements

- Provide usage information for Main Menu links especially by their order – coming from [Ideas](#)

<table>
<thead>
<tr>
<th>LIBRARY SEARCH</th>
<th>TAGS</th>
<th>JOURNAL SEARCH</th>
<th>CURRENT</th>
<th>FETCH ITEM</th>
<th>BROWSE</th>
<th>...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
</tbody>
</table>

- Ongoing effort to support Analytics for:
  - Collection Discovery
  - Newspaper Search
  - Next and Previous action
  - My Library Card (Loans) - Renew, Renew Selected, Renew All button
  - My Library Card (Requests) - Cancel button.
Add Unsubscribe Link to Alert Emails

• Primo allows signed-in users to receive email alerts when there is an update to the saved search query.
• To cancel alert user can either click on “Cancel Alert” button in My Favorites or on the link to unsubscribe in the email itself.
Add “Load More Results” button in My Favorites

• From performance and accessibility considerations, the “Load More results” button has replaced endless scrolling in My Favorites
Accessibility – Ongoing improvements

• Fix bulk of issues coming from customs reports and an external audit

• Documentation
  • Updated VPAT Primo Accessibility Conformance Report
  • Primo Accessibility Roadmap lists all accessibility gaps that were identified and listed in the VPAT and indicates the time frame in which these gaps are expected to be resolved.
More Updates - Renew the SAML certification

• The SAML signed certificate will expire in October 2019
• New SAML Certificate is available with May release
• If you are using SAML user authentication, contact your administrator to renew the certificate
CDI – the Central Discover Index – a brief update

Get ready for the future

• A unified index for Primo & Summon
• Enhanced operational efficiency
• Focus on data intelligence and smart services based on contextual relations
• CDI_Frequently_Asked_Questions_for_Primo_Customers

Some key enhancements coming with CDI

• Move to single activation via Alma/SFX
• Optional EasyActive setting to simplify activation for search
• Faster update cycles (Activations for search and full text availability flag)
• Merged instead of grouped records
• More granular resource types

Register
Upcoming Webinar on May 29

Ex Libris Central Discovery Index: An Overview and Update
Primo VE Updates

Normalization of Local Search and Facets

GetIt Related Features

Extend Local Resource Type Configuration

Consortia Related Features

Increase Facets to display up to 50 Values

Regional Related Features

Take Advantage of the Platform
Normalization of Local Search and Facets Fields

• Primo VE allows you to create local fields from all MARC tags for search and facet.

*Also coming from Idea Exchange*
Normalization of Local Search and Facets Fields

• Normalization rules uses the Drools language, as for in Alma and Primo VE display fields: support of defining conditions, actions, regular expression etc.

• You can define up to 10 local fields to use normalization rule in a new entry in discovery configuration:

• Local fields used Normalization rule require re-indexing of the data

• Coming up in this area...
  • **Test tool** - Planned for July. Currently can be tested by apply the search on saved record that fits the normalization rule criteria.
  • **Support UNIMARC** - Planned for August
## Normalization for Search and Facets in Local Fields

- Best Practices and comparison to the existing functionality

<table>
<thead>
<tr>
<th>MARC Tags List</th>
<th>Normalization Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closed list of MARC tags</td>
<td>Ability to use all MARC tags</td>
</tr>
<tr>
<td>Contains MARC local fields: 009, 09X, 490, 5XX, 69X, and 9XX.</td>
<td></td>
</tr>
<tr>
<td>Full MARC tag is taken</td>
<td>Normalization Rules</td>
</tr>
<tr>
<td>All the subfields are used</td>
<td>Provide flexibility to use any tags and subfields</td>
</tr>
<tr>
<td>Applied immediately</td>
<td>Requires indexing of the data</td>
</tr>
<tr>
<td>MARC local fields are indexed automatically and ready to use</td>
<td>Open a case to support for reindexing of the institutional data</td>
</tr>
</tbody>
</table>
Normalization for Search and Facets in Local Fields

Demo
Consortium – Entire Network Scope Based on Availability

- Enhance the granularity in Entire Network scope configuration
- New condition: **Entire Network Inventory** (Available Physical, Electronic or Digital)
Use LDR and Fixed Fields for Local Resource Type

- LDR and fixed fields can now be used for creating new resource types
- Regular expressions option was added

*Coming from Idea Exchange*
Take Advantage of the Platform

Merging locations within single library based on External Name

• A library can have multiple locations with different names but with same External Name. Primo VE merges all those locations to one facet.

• No need for reload, changes are affected immediately.
More Primo VE Updates

• Merging Information from all the Records in the Dedup Group
  • MMS ID’s are merged and can be seen in full display or ShowPnx

![Dedup Member Ids](image)

• Courses are merged and display from all the members

![Course Information](image)

• Search Response Time Improvement
  • As always, we keep working on performance improvements.
  • In June release the delivery calculation is separated from the search API and done in a separate call.
  • The coming releases we will focus on additional enhancements in search and the Get It areas
Sneak Peek for 2019 Q3

- More from the same Courses / Collections
- Display reason for Non-renewable Loans in My Library Card
- Ranking Configuration
  Primo VE
- Export to Mendeley
- Search Engine Optimization (SEO) Friendliness
- Union View for Consortium
  Primo VE
Thank you!

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