

What's New for Primo/Primo VE

2023 Q2 - Primo Product Team



Highlights



- Resource Types Filter Bar
- Improving the User’s Session Timeout Experience
- Support Customization of System Resource Type Mapping
- Advanced Search - New operator “Equals exact phrase”
- My Library Card – Option to Filter by Fine Status
- Additional Notable Items & Updates

Primo - What's New

Primo and Primo VE

Resource Types Filter Bar

Improving the User's Session
Timeout Experience



CDI – AI Assisted Citation Parsing

Ongoing Accessibility Improvements

Primo VE

Advanced Search - New operator
“Equals exact phrase”



Support Customization of System
Resource Type Mapping



My Library Card – Option to Filter by
Fine Status

API to Retrieve Analytics Report

Improved Usability of Resource
Recommender Management

Primo & Primo VE Release Schedule

- [Primo May 2023](#)

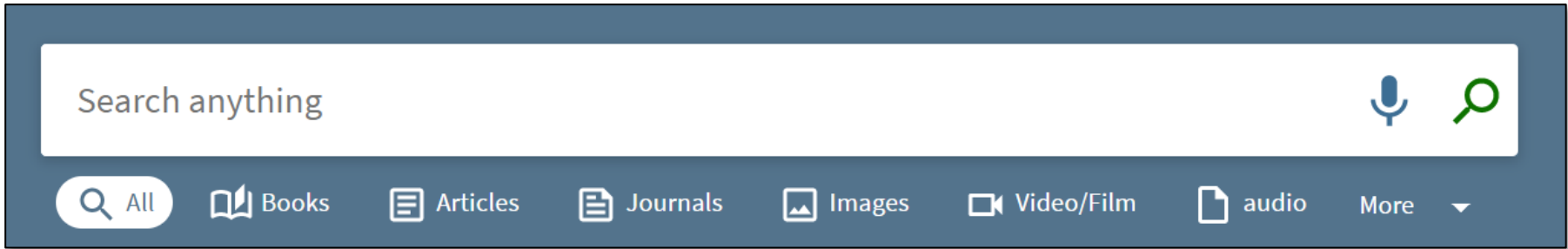
Quarterly Release	MT Sandbox	Total Care (TC)	MT Production	Local
May 2023	April 23, 2023	April 30, 2023	May 7, 2023	May 21, 2023

- [Primo VE Release Schedule](#)

Monthly Release	Sandbox Release	Production Release	Release Update	Release Type
March 2023	February 19, 2023	March 5, 2023	-	Resolved Issues Analytics
April 2023	March 19, 2023	April 2, 2023	-	Resolved Issues Analytics
May 2023	April 23, 2023	May 7, 2023	May 14, 2023	Feature Release Resolved Issues

Resource Types Filter Bar

Introduce new Resource Types Filters under the Search Bar, allowing users to easily narrow their search results by selecting one of these main resource types.



Library can select up to 10 resource types (systems or local ones) to show under the Search Bar

Library can map which resource types will be displayed for each search scope

Users can use the new filter bar for main resource type and the facet Resource Types as secondary resource types

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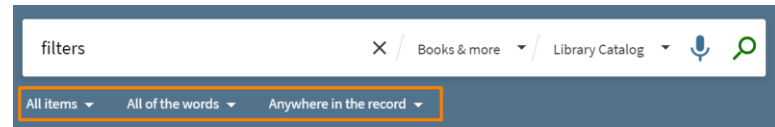
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Resource Types Filter Bar

- Resource types will be displayed in the filter bar as pre-defined irrelevant if results were found
- Customers can customize the icons

```
<svg id="<icon-id>" viewBox="0 0 24 24"><path xmlns="http://www.w3.org/2000/svg" d="<new-svg>" /></svg>
```

- You can use either the
 - new Resource Types Filter bar or
 - basic search pre-filter
- Analytics:
 - usage per location
 - Checking option to have usage per type -



Improving the User's Session Timeout Experience

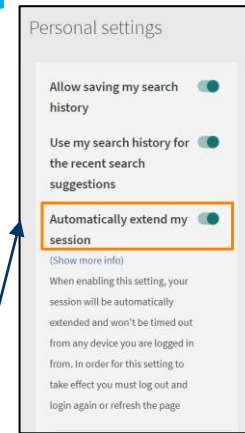
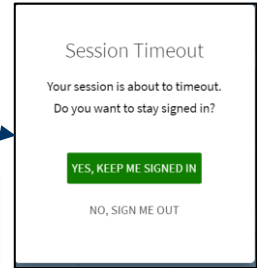
Introduce new settings to notify the users upon session timeout, allowing them also to extend future sessions automatically

Users will receive a message 60 seconds before timeout, and it will allow them to extend the session for another session period

Upon session time out, guide the users with new settings to extend future sessions automatically

Your session has timed out. Note that you can choose to automatically extend your session under your Personal Settings ↗ SIGN IN ✕ DISMISS

Add a new toggle in the Personal Settings:
Automatically extend my session



*Coming from NERS #77809 - [Ideas Exchange](#)

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* Subject also to timeout policy of library's remote authentication system

Support Customization of System Resource Type Mapping

You can now custom the mapping of system resource types
Your new custom mapping rules will be checked prior to system's mapping

For example: Library would like to change the mapping of system resource type: **conference proceedings**

View the mapping of conference_proceedings in [documentation](#)



Define your mapping rules :
add additional mapping to the existing one

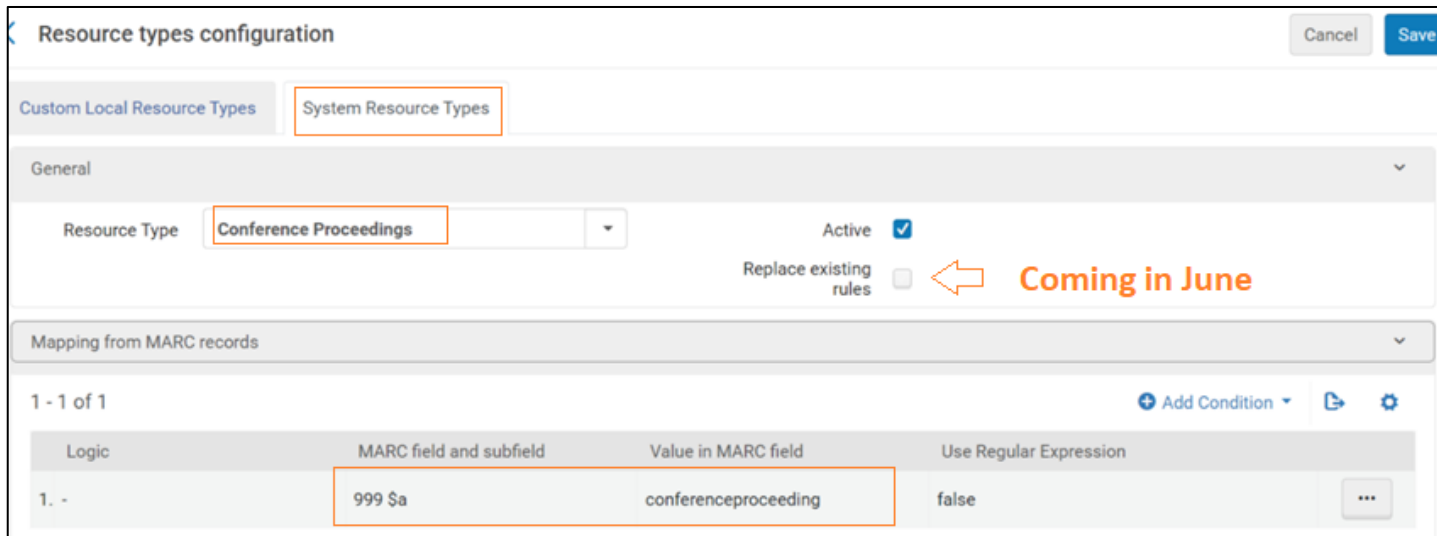
conference_proceedings	008(29) = 1
------------------------	-------------

999 = ""conferenceproceeding""

*Coming from NERS #7790 - [Ideas Exchange](#)

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Support Customization of System Resource Type Mapping



Resource types configuration

Custom Local Resource Types | System Resource Types

General

Resource Type: Conference Proceedings

Active:

Replace existing rules: ← Coming in June

Mapping from MARC records

1 - 1 of 1

Logic	MARC field and subfield	Value in MARC field	Use Regular Expression
1. -	999 \$a	conferenceproceeding	false

Local Resource Type Mapping

Custom System Resource Type Mapping

OTB System Type Mapping

The maximum number of local resource types that you can configure has increased from 20 to 50.

With the June 2023 release, we will provide options :

- To completely override the out-of-the-box mappings for system resource types.
- To custom the order of the mapping

Advanced Search - New operator “Equals exact phrase”



New operator “equals exact phrase” allow users to view results in which the data in the specified Author, Title, or Subject field contains only the exact phrase

Search filters

Any field ▼ contains

AND ▼ All ▼ contains exact phrase ← renamed as previously called is (exact)

starts with

+ ADD A NEW equals exact phrase ← New operator

Supported fields for new Operator in both CDI and Primo VE are:

- Title
- Author/Creator
- Subject

*Coming from NERS #6693 - [Ideas Exchange](#)

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[Demo](#)

Advanced Search - New operator “Equals exact phrase”

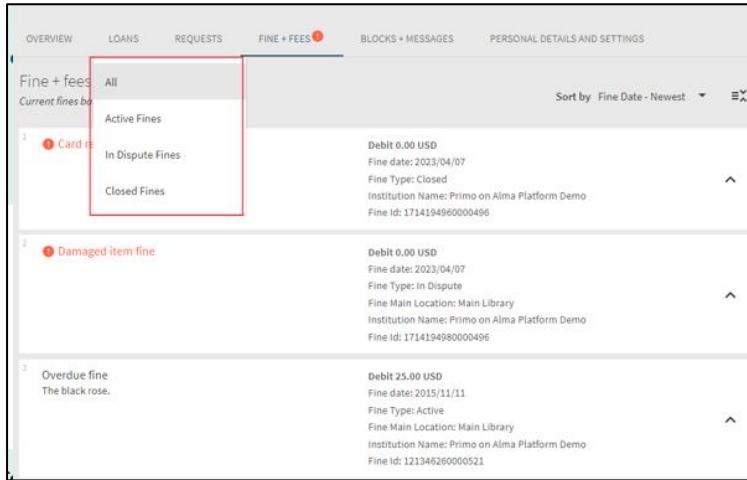
Searching the term	Contains exact phrase	Equals exact phrase	Comments
Kern, Stephen or Kern Stephen	Include also results with Kern, Stephen (1943-....) or Kern, Stephen B.	Kern, Stephen	
Stephen Kern	Same results as searching Kern Stephen	Show less results only ones indexed as <search> <creatorcontrib>STEPHEN KERN</creatorcontrib>	Changing the order will retrieve results that are indexed in the same order
Criminal law	Include also Criminal law -- History Criminal law -- Soviet Union -- History Criminal law -- France -- History	Only Criminal law	
Sasha's Tail: Lessons from a Life with Cats	Include also Agriculture -- Sasha's Tail: Lessons from a Life with Cats	Only “Sasha's Tail: Lessons from a Life with Cats”	
Journal of neurophysiology	Include also Looking Into the Future - The Journal of Neurophysiology	Only Journal of neurophysiology	
Pet	The pet , Journal of exotic pet medicine	Pet , The Pet	special characters and definite or indefinite articles (e.g., “the”)

Advanced Search - New operator “Equals exact phrase”

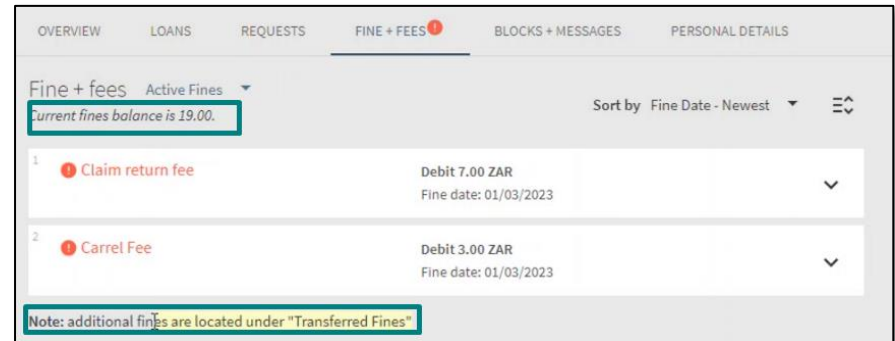
- Search Query attempts to search only the user’s terms
 - No search engine expansion is applied on search query (inflection, synonyms , melingo – Hebrew search plug-in)
 - Matched is done on specific search fields – note that display fields may be different from search field
- Option to use the “Equals exact phrase” also for Hypertext linking
 - Subject: Normalization rules were changed for all 6XX subject display fields (and 880-6XX fields) to support better format of \$Q (search query) used when clicking on subject hypertext linking
 - Changes will be applied after Repository semi-annual indexing is completed - July

My Library Card – Option to Filter by Fine Status

Allow users to view all fines and filter fines by status



The filter shows only status that are relevant to the user's current fines and fees

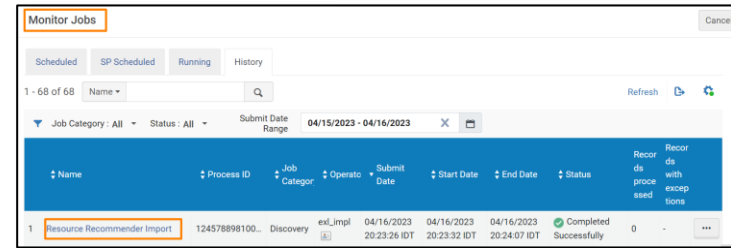
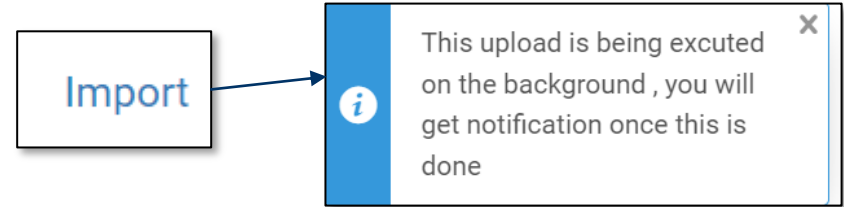
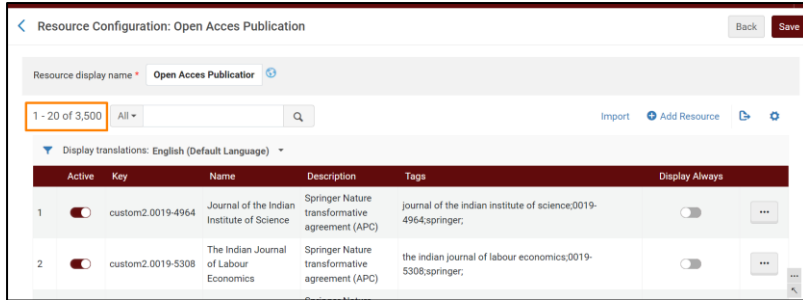


If defined, current balance can include both active and transferred fines and fees, message will be added to note the users on additional fees.

*Coming from - [Ideas Exchange](#)

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Improved Usability of Resource Recommender Management



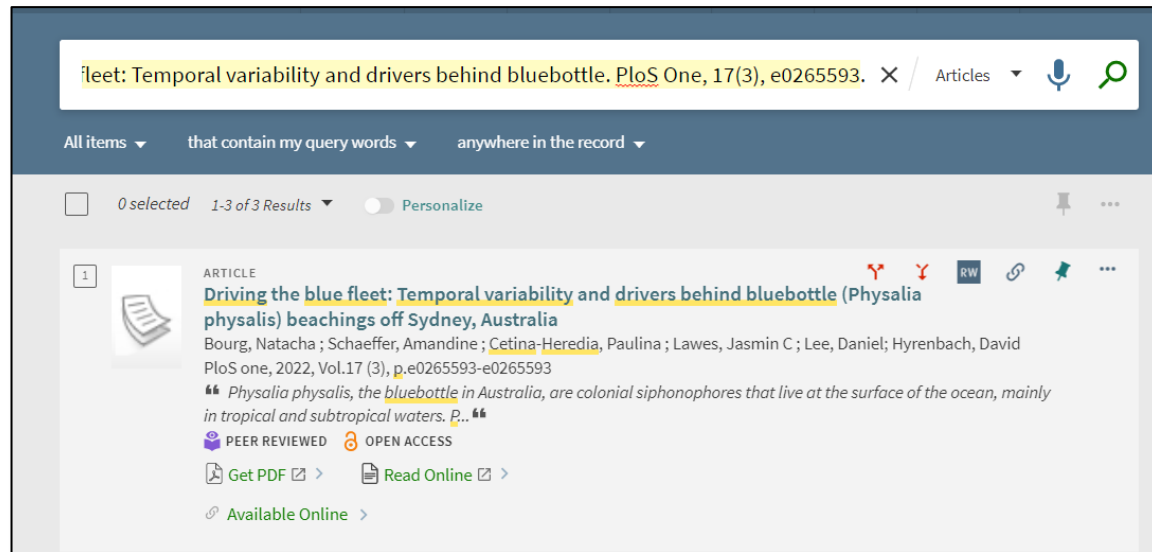
Adding pagination in Resource Recommender Admin pages to support easy navigation when mass resources are defined

Support import from xls in the background in case of loading mass of resources. You can monitor the job in

CDI – AI Assisted Citation Parsing

Enhanced citation query parsing based on open source AI tool

Use of GROBID to identify and parse citation for more accurate results to account for typical style differences such as shortened names, pagination etc.



The screenshot shows a search interface with a search bar containing the query: "fleet: Temporal variability and drivers behind bluebottle. PloS One, 17(3), e0265593." The search results show 1-3 of 3 results. The first result is an article titled "Driving the blue fleet: Temporal variability and drivers behind bluebottle (Physalia physalis) beachings off Sydney, Australia" by Bourg, Natacha; Schaeffer, Amandine; Cetina-Heredia, Paulina; Lawes, Jasmin C.; Lee, Daniel; Hyrenbach, David. The article is published in PloS one, 2022, Vol.17 (3), p.e0265593-e0265593. The article is peer reviewed and open access. The interface includes options to get the PDF, read online, and available online.

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Additional Notable Items

- Accessibility ongoing fixes following customer cases and input from external audit
 - New VPAT is available on CKC
 - 2023 accessibility roadmap will be published soon based on external audit

- Primo VE – Analytics API (Idea)
 - This enhancement allows you to use an API to return a Primo VE Analytics report in XML
 - <https://developers.exlibrisgroup.com/primo/apis/analytics/>

- Adding more content providers is 2023 priority
- Now with 34 supporting providers
- Over 10,500 collections with 1.55 billion records
- Linking success rates – 99%

[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/030Primo_VE_User_Interface/Quicklinks_Provider_List](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/030Primo_VE_User_Interface/Quicklinks_Provider_List)

Provider	Contact	Type of Collection (PDF/HTML)
ACH Digital Library	All	PDF
Elsevier	All	HTML
ProQuest	All Content including eBooks on the ProQuest Platform https://www.proquest.com	HTML (in most cases this includes the PDF) but is included with the HTML
SAGE Publications	Journals https://journals.sagepub.com	PDF, HTML
Springer Nature	Journals and Books https://link.springer.com	PDF, HTML
Wiley-Blackwell	Journals and Books https://onlinelibrary.wiley.com	PDF, HTML
Boone	Journals https://boone.org	PDF
IDP Publishing	All	PDF
National Library of Medicine	Content which is part of Public Domain collection https://pubmed.ncbi.nlm.nih.gov/	PDF, HTML
New England Journal of Medicine	Content https://www.nejm.org/	PDF, HTML
Emerald	Journals and Books https://www.emerald.com/	PDF, HTML
Cisco Reference	Content https://search.cisco.com/	PDF, HTML
Thieme	All Journals (includes conference proceedings) https://www.thieme.com https://www.thieme.com/medline/crosslink/journals	PDF, HTML
IOS	Content https://www.ios-inc.com/	HTML
Mary Ann Liebert, Inc.	Journals https://www.wiley.com/	PDF, HTML
SPR	Content https://www.sagepub.com/	PDF, HTML
University of Chicago Press	Content https://www.uchicago.edu/	PDF, HTML
Routledge Publications	Content https://www.routledge.com/	PDF, HTML
Project MUSE	Journals and Books https://muse.jhu.edu/	Journals (PDF, HTML) Books (HTML)
IJTOR	Journals https://www.ijtor.org/	PDF, HTML
American Institute of Aeronautics and Astronautics	Journals, Standards, Proceedings, Books https://arc.aiaa.org/	Journals, Standards, Proceedings (PDF, HTML) Books (HTML)
Alexander Street	All	HTML
Taylor & Francis	All	PDF, HTML
Emerald Publishers	All	PDF
World Scientific Publishing	Journals	PDF
Cambridge University Press	Journals, Books	HTML
American Chemical Society	Journals, Books	PDF, HTML
International Higher Education Press	Journals	HTML
American Society for Microbiology	Journals	PDF, HTML
INFORMA	All	PDF, HTML
Edinburgh University Press	Journals https://www.edupub.com/	PDF, HTML
Hammarist	Books	HTML
O'Reilly Media, Inc.	Books	HTML
USPTO	Published applications and issued patents available under https://www.uspto.gov/patents/publications/patent-publications	PDF

Sneak Peek for 2023 Q3

Primo and Primo VE

Collection Discovery Usage



Introduce New Carrousel Widget to Embed Library resources in other sites

Primo VE Linked Data – Person Info Card

*was delayed from May

Highlight the Preferred Record on Top of the List of Versions

Enhancing DEDUP & FRBR Definitions to include Keys based on local fields.

Enrich Resource Recommender Matching

Display Item Policy



Community Engagement

Webinar next week – Thursday April 27, 2023

ExLibris  innovative
Part of Clarivate

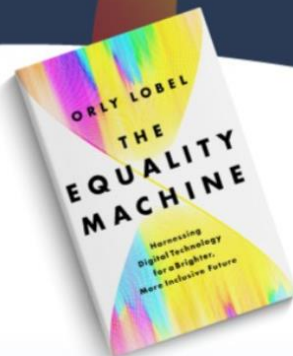


Ex Libris & Innovative present:

Diversity and inclusion by design – How technology can ensure a better world



Orly Lobel
Award-Winning Author



April 27, 2023

11:00 am EDT (New York)
4:00 pm GMT+1 (London)



SCAN ME

Link in the chat

Upcoming User Group Events



Thank you!

Nili.Natan@clarivate.com

