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International Group of Ex Libris Users

A Spotlight on Functionalities You can Enable to Maximize your Primo VE Experience

Presented by:

Shira Cohen

Technical Support Team Leader

Agenda

Search Functionalities

Full Record Display

Resource Type

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Search Functionalities

- Support "Starts With" Option for Call Number Searches
- Barcode Search
- Exact Phrase Only Searches in Advanced Searches

"Starts With" Option for Call Number Searches

When enabled users can search for holdings call numbers with the "start with" search operator

"Starts With" Option for Call Number Searches Configuration

- Configuration > Discovery > Other > Customer Settings

Parameter	Parameter Value	Outcome
allow_start_with_for_call_number	False (default)	Starts with searching is not available in call number searches
	True	Enables search for holdings call numbers that start with specified value in Advanced Search

- Configuration > Discovery > Display Configuration > Configure Views > Edit View > Advanced Search Configuration tab
- Enable the search index "Holding Call Number"

"Starts With" Option for Call Number Searches

- Configuration > Discovery > Display Configuration > Labels

Code Table	Code	Default Label
Aria Labels	nui.aria.search.startswithAria	This search type is available only for Title field
Search Tile Labels	search-advanced.precisionOperator.option.startswithTitle	This search type is available only for Title field

Barcode Search

When enabled users can locate specific physical items on the shelves, easily.

Barcode Search Configuration

- Discovery > Display Configuration > Configure Views > Edit View > General tab

Barcode Search

- Discovery > Display Configuration > Labels

Code Table	Code	Default Label
Search Tile Labels	nui.search-barcode.barcodeSearch	Barcode Search
	nui.search-barcode.barcodeSearchButton	Search
	nui.search-barcode.noResults	No records found for {{searchTerm}}
	nui.search-barcode.noResultsText	Try to refine your search term
	nui.search-barcode.searchTerm	Enter a barcode
Aria Labels	nui.aria.search.barcodeSearch	Search by Barcode

Barcode Search Analytics

- Action has been added to Primo Analytics > Action Usage Subject Area
- Action: Barcode Search
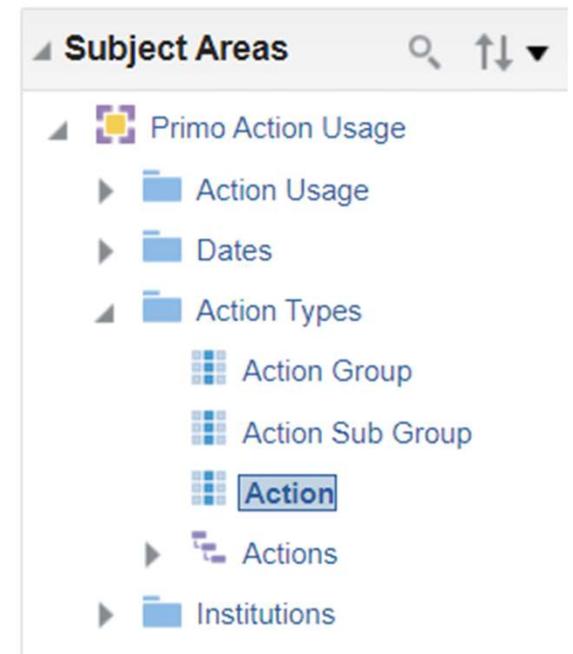
# Exact Phrase Only Searches in Advanced Searches

- Equals exact phrase = returns results that contain **only** the exact phrase.
- Contains exact phrase = returns results that **include** the exact phrase, but could also contain other words

Exact Phrase Only Searches in Advanced Searches Configuration

- Discovery > Display Configuration > Configure Views > Edit View > Advanced Search Configuration tab
- Out of the box: this operator is enabled by default for new views

Search Operators

1 - 4 of 4
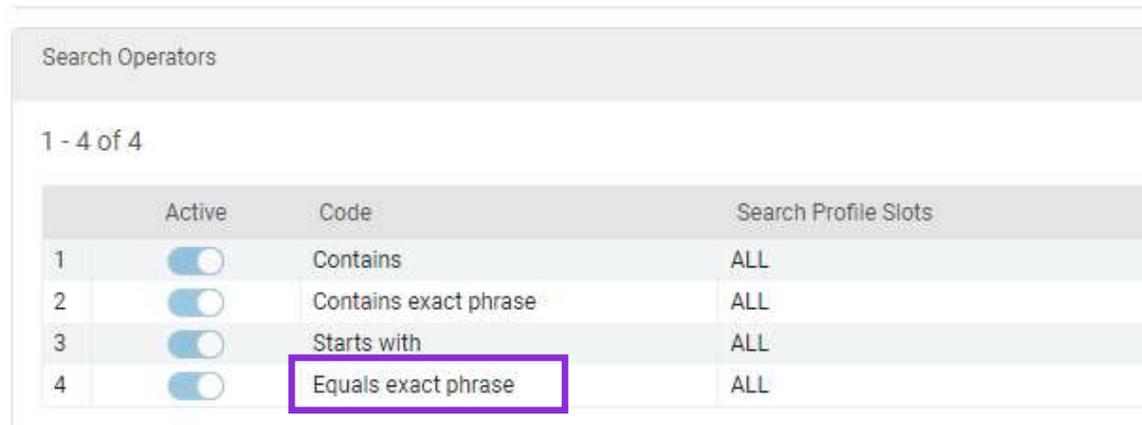
	Active	Code	Search Profile Slots
1	⬤◯	Contains	ALL
2	⬤◯	Contains exact phrase	ALL
3	⬤◯	Starts with	ALL
4	⬤◯	Equals exact phrase	ALL

Exact Phrase Only Searches in Advanced Searches Configuration

Configuration > Discovery > Disp

Search Operator Column:

Exact Phrase Only Searches in Advanced Searches

- Discovery > Display Configuration > Labels

Code Table	Code	Default Label
Search Tile Labels	search-advanced.precisionOperator.option.equalsPhrase	Equals exact phrase
	search-advanced.precisionOperator.option.equalsPhraseTitle	This search type is available only for Title, Author and Subject fields
	search-advanced.precisionOperator.option.startswithTitle	This search type is available only for Title field
Aria Labels	nui.aria.search.contains	Contains
	nui.aria.search.containsExact	Contains exact phrase
	nui.aria.search.startswithAria	This search type is available only for Title field
	nui.aria.search.equalsPhraseAria	This search type is available only for Title, Author and Subject fields

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Full Record Display

- Alphabetic Sort of Subjects
- Direct Linking from Full Record Display
- Display Item Policy in GetIt

Alphabetic Sort of Subjects

When enabled, subjects that display in the record's full details can be sorted alphabetically by subject

Alphabetic Sort of Subjects Configuration

- Configuration > Discovery > Other > Customer Settings

Parameter Key	Parameter Value	Outcome
subjects_alphabetical_sort_fullDisplay	False (default)	Subjects display in order from metadata record
	True	Subjects sort alphabetically

Direct Linking from Full Record

When enabled, users can go directly to full text from the full record when clicking on the brief availability status.

Direct Linking from Full Record Configuration

- Configuration > Discovery > Other > Customer Settings

Parameter Key	Parameter Value	Outcome
apply_direct_linking_settings_in_full_record	True	Direct linking from the full record's display is enabled
	False (default)	Direct linking is disabled

Direct Linking from Full Record Configuration

- Configuration > Fulfillment > Discovery Interface Display Logic > Direct Linking

- Enable direct linking: must be set to Yes

< **Direct Linking Configuration**

Enable direct linking   ○ No   ● Yes

Enable direct linking when multiple services are available ☑

Disable direct linking when additional information is available:

Authentication note ☑

Public Note ☐

Disable direct linking for electronic collections ☐

Disable direct linking for journals ☐

Disable direct linking for digital resources ☐

Display Item Policy in GetIt

When enabled, the item's policy is presented in the Item Display information.

This information is displayed in Primo only if the Item Policy field is configured in Alma's Physical Item Editor

Display Item Policy in GetIt Configuration

- Configuration > Discovery > GetIt Configuration > Items Display Configuration

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Resource Type config

- Resource Type Filter Bar
- Customizing System Resource Type Mapping
- Display Document Attributes for CDI Records

Resource Type Filter Bar

When enabled, a resource-type filter ribbon appears under the basic search box.
It allows users to filter the results by resource type.

Resource Type Filter Bar Configuration

- Configuration > Discovery > Display Configuration > Configure Views > Edit View > Brief Results tab

Resource Type Filter Bar

- Discovery > Display Configuration > Labels

Code Table	Code	Default Label
Results Tile Labels	nui.results.resourcesFiltersBar.All	All
	nui.results.resourcesFiltersBar.More	More
Aria Labels	nui.aria.resourcesFiltersBar.All	View all results retrieved
	nui.aria.resourcesFiltersBar.filter	Click to filter the results to {{filter_name}}
	nui.aria.resourcesFiltersBar.More	Click to see more available filters for your search

Resource Type Filter Bar
 Analytics

- Primo Analytics > Action Usage Subject Area

- Actions:

  - Clicking on a resource type filter bar - <1-11>
    User selected All (position 1) or a resource type (position 2-11) in the Resource Type Filter Bar.

  - Clicking on More on the filters bar
    User selected More in the Resource Type Filter Bar
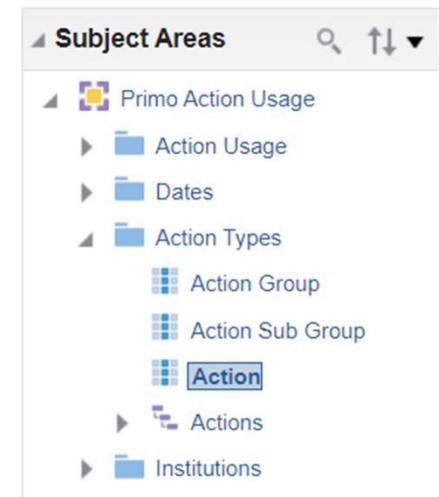
Customizing System Resource Type Mapping

Customize the mapping of OTB resource types:

• Add conditions

• Reassign mapping conditions from a system resource type to another system resource type (system or local)

• Replace a resource type's conditions completely and change the order of the mapping rules.

Precedence is the following:

1. Local resource types.

2. Customized system resource types

3. Out-of-the box system resource

Customizing System Resource Type Mapping Configuration

- Configuration > Discovery > Display Configuration > Resource types configuration > Add/Edit Resource Type Configuration > System Resource Types tab

Display Document Attributes for CDI Records

CDI document attributes provide more information about the type of record and complement the existing resource types.

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When enabled, the attributes are displayed as a flag in the brief and full displays of the CDI record.

Users can select the attributes as additional resource types in the rtype facet and search queries.

Display Document Attributes for CDI Records

Use a CDI document attribute code as a local resource type:

• For local data- the local resource type is displayed like any regular resource type.

• For CDI records- it is displayed as a document attribute

For the resource type facet, the behavior is the same:

• For blended searches, both local and CDI records are included in the same facet count

• For local, if the same code is defined as a local resource type, then records with this rtype are returned.

Display Document Attributes for CDI Records Configuration

Configuration > Discovery > Display Configuration > Configure Views > Edit View > General Tab

Display Document Attributes for CDI Records

- Discovery > Display Configuration > Labels

Code Table	Code	Default Label
Facet Resource Type Labels	facets.facet.facet_rtype.review_article	Review Articles
	facets.facet.facet_rtype.primary_source	Primary Sources
	facets.facet.facet_rtype.preprint	Preprints
	facets.facet.facet_rtype.retracted_publication	Retracted Publications
	facets.facet.facet_rtype.withdrawn_publication	Withdrawn Publications
	facets.facet.facet_rtype.retraction_notice	Retraction Notices
	facets.facet.facet_rtype.withdrawal_notice	Withdrawal Notices
	facets.facet.facet_rtype.publication_exp_concern	Publications with Expression of Concern
	facets.facet.facet_rtype.publication_addendum	Publications with Addendum
	facets.facet.facet_rtype.publication_corrigendum	Publications with Corrigendum
Results Tile Labels	attribute.review_article	Review Article
	attribute.review_article_tooltip	A review article presents the current state of the research on a particular topic or research area via the review of primary research on that specific topic
	attribute.primary_source	Primary Source
	attribute.primary_source_tooltip	A primary source provides first-hand testimony or direct evidence concerning a topic under investigation. It contains the actual textual material that is the subject of research

Resources

Resources

- Release Notes
- Search Operators
- Alphabetic Sort of Subjects in Record's Full Details
- Direct Linking
- Item Display for Primo VE
- Resource Types for Primo VE
- CDI Document Attributes

Release Schedule

Download ics file to add the 2023 release dates into your calendar.

Thank you!

Shira Cohen

Shira.Cohen@Clarivate.com