

# What's New for Primo/Primo VE

2023 Q1- Primo Product Team



# Highlights



- Add Barcode Search
- Support "Starts With" Option for Call Number Searches
- Support Search in My Favorites
- Improved Pagination Experience
- Additional Notable Items & Updates

# Primo - What's New

## Primo and Primo VE

Add Barcode Search

NERS



Support "Starts With" Option for Call  
Number Searches

NERS



Support Search in My Favorites

Improved Pagination Experience

NERS



Default Settings for Additional  
Personal Settings

Alphabetical Sort for 'Get it from  
other institutions'

## Primo VE

Browse by Geographic Name -  
Support LC Name Authority Records  
for (651)

UNIMARC and CNMARC Mapping  
Improvements

Support Country Field in My Library  
Card – Personal Details

Support Separate Form's  
Description for the Requests and  
Booking Requests

# Primo & Primo VE Release Schedule

- [Primo February 2023](#)

Quarterly Release	MT Sandbox	Total Care (TC)	MT Production	Local
February 2023	January 22, 2023	January 29, 2023	February 5, 2023	February 19, 2023

- [Primo VE Release Schedule](#)

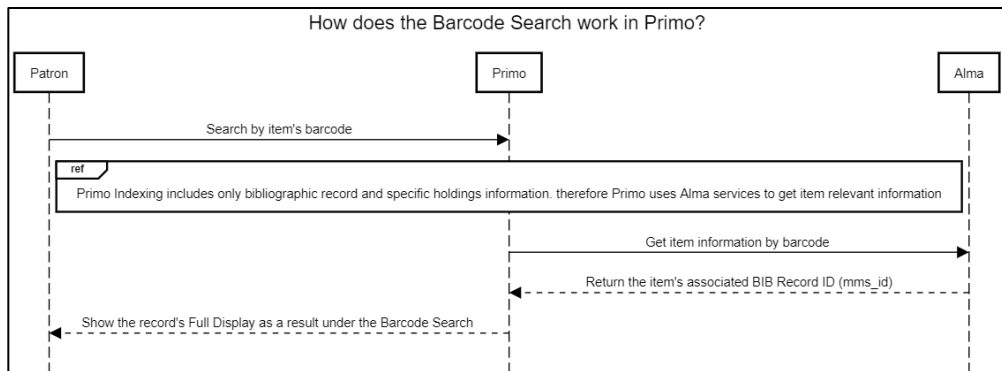
Monthly Release	Sandbox Release	Production Release	Release Update	Release Type	Notes
January 2023	December 18, 2022	January 8, 2023	-	Resolved Issues Analytics	Repository semiannual indexing is ready
February 2023	January 22, 2023	February 5, 2023	February 12, 2023	<b>Feature Release</b> Resolved issues	<ul style="list-style-type: none"><li>• Primo VE semi-annual indexing is ready</li><li>• Premium sandbox refresh occurs with the Release Update</li></ul>

# Add Barcode Search



A new “Barcode Search” section the Advanced Search is available allowing users to easily locate specific physical items using item’s barcode

The screenshot shows a search interface with a header labeled "SEARCH CRITERIA" and a sub-header "BARCODE SEARCH" highlighted with an orange border. Below the header is a text input field with the placeholder text "Enter a barcode" and a "SEARCH" button with a magnifying glass icon.



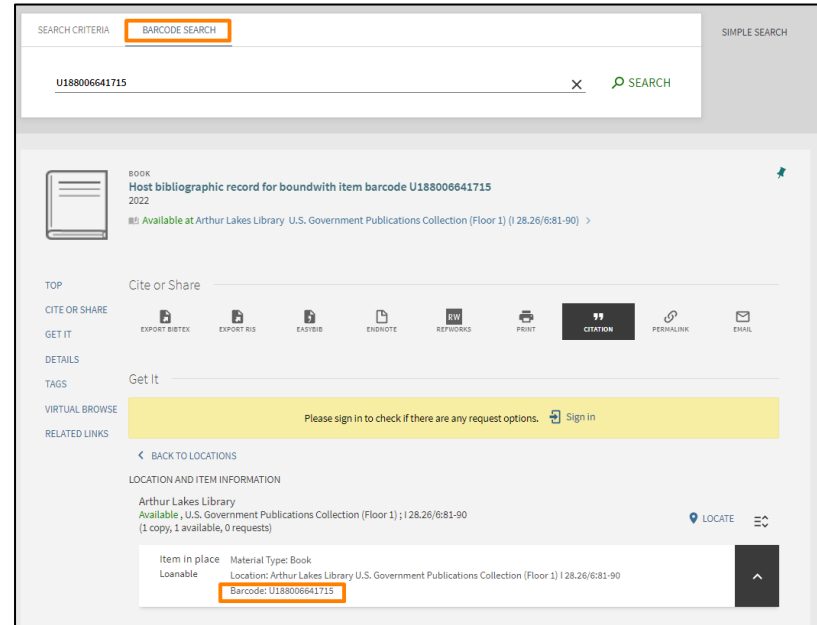
\*Coming from NERS #7859 - [Ideas Exchange](#)

Primo VE  
FEB 23

Primo  
FEB 23

# Add Barcode Search

- Disabled out of the box
- Show the result as a single record in Full Display format under the Barcode Search
  - similar experience as Fetch Item
- Switching between the tabs Barcode Search/Search Criteria will show tab's recent result up to the next search invoked.
- Scope: local bibliographic records or linked records to NZ



[Demo](#)

# Support "Starts With" Option for Call Number Searches

NERS



Support "Call Number Starts with" to allow users easily search for local records in the range of their call number first letters

- Disabled OTB
- Supported both in the Advanced Search and in the basic Search Pre-Filters

Search anything

All items  starts with  Call number

\*Primo BO - Re-indexing is required

\*Primo VE Semi-annual will be completed by February

\*Coming from NERS #7986 - [Ideas Exchange](#)

SEARCH CRITERIA BARCODE SEARCH

Search for:  Mines Library  Library Catalog  Just Articles

Search filters

Holding Call Number starts with  Enter a search term

AND Holding Call Number contains  Enter a search term

+ ADD A NEW LINE CLEAR

Material Type: All items  
Language: Any language  
Start Date: Day Month Start Year  
End Date: Day Month End Year

Holding Call Number starts with  AND Holding Call Number contains  SEARCH

SEARCH CRITERIA BARCODE SEARCH

Holding Call Number starts with **UA** AND Holding Call Number contains  SEARCH

Primo VE  
FEB 23

Primo  
FEB 23

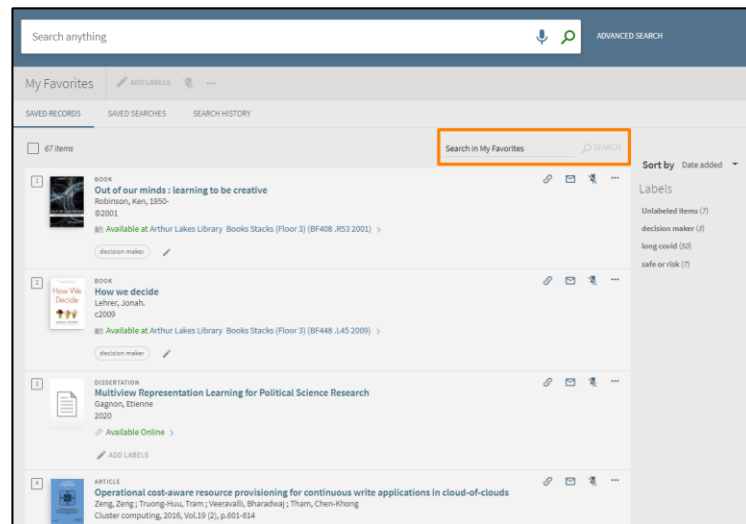
[Demo](#)

ExLibris  
Part of Clarivate

# Support Search in My Favorites

Allow users to easily find records of interest in their Saved Records

- Available only for signed-in users
- Supporting basic search on records' title, author and labels fields
- No configuration is necessary to enable this functionality

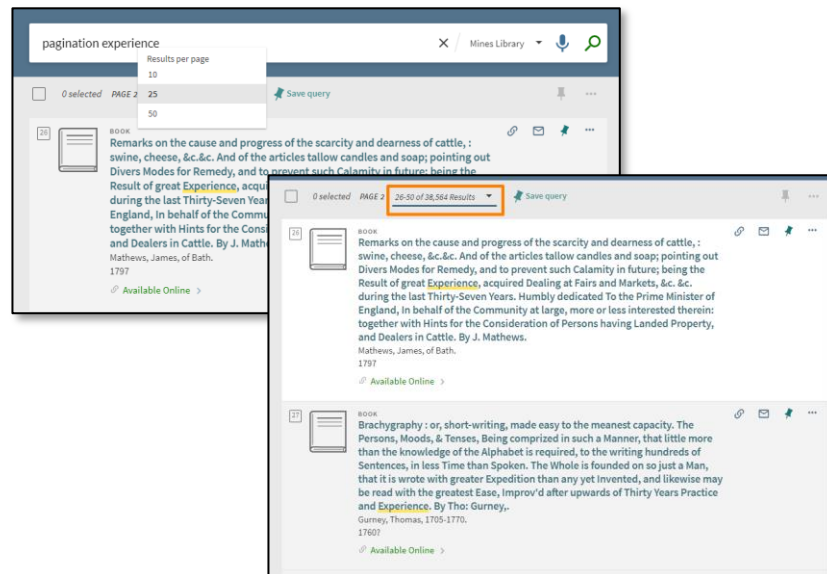
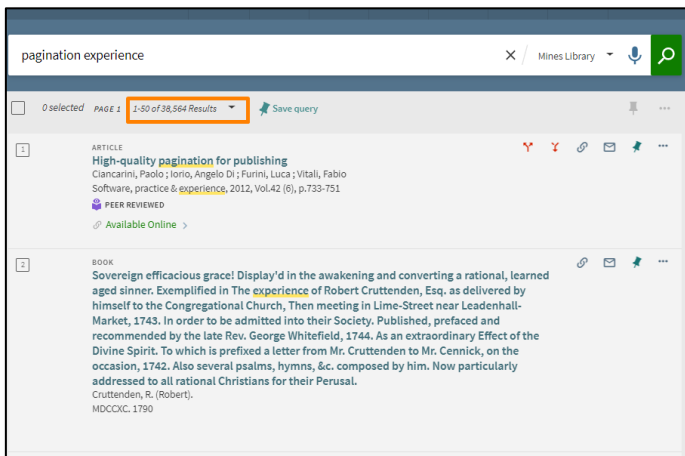


\*Coming from [Ideas Exchange](#)



# Improved Pagination Experience

Allow users to easily define number of results per page and improve their pagination experience



\*Coming from NERS #7700 [Ideas Exchange](#)

Primo VE  
FEB 23

Primo  
FEB 23

# Improved Pagination Experience

- Allow the users to select from the top of the page the number of results per page
  - Show the users the current range of results based on the current page and selected number of records per page
  - Support the selection of number results per page also at the bottom of the page
- The selected number of results per page is kept between sessions for signed-in users
- No configuration is available for this enhancement
- In addition, reduce Slide-In Animation while scrolling the Brief Results.

Primo VE  
FEB 23

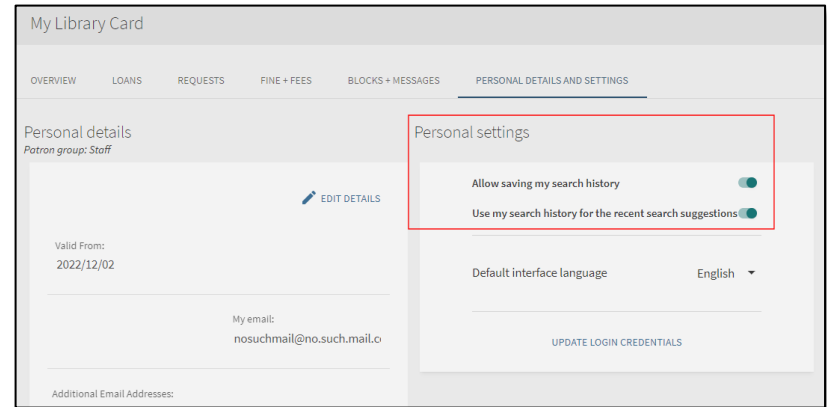
Primo  
FEB 23

[Demo](#)

# Default Settings for Additional Personal Settings

Ability to set the default users' settings for Search History toggles in My Library Card -> Personal Details

- Add parameter `default_user_search_history_off` to set the default for all additional personal settings.
- Taking into consideration existing users' settings to maintain user preferences



Primo VE  
DEC 22

Primo  
FEB 23

# Support Country Field in My Library Card

Users can now view or update their country from  
My Library Card -> Personal Details section

The screenshot shows a user interface for 'Personal details' with a navigation bar at the top containing 'OVERVIEW', 'LOANS', 'REQUESTS', 'FINE + FEES', 'BLOCKS + MESSAGES', and 'PERSONAL DETAILS'. The 'PERSONAL DETAILS' section is active and shows the following information:

- Patron group: Staff
- Address: lionel messi 10
- City: Rosario
- Country: Argentina (highlighted with an orange box)
- Valid From: 28/08/2016
- Telephone 1: 1234
- My email: lionel.messi@gmail.com

An 'EDIT DETAILS' link with a pencil icon is located in the top right corner of the details section.

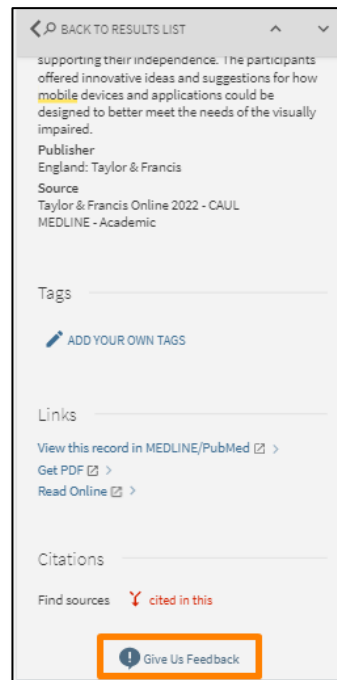
Primo VE  
FEB 23

# Additional Notable Items for Primo VE

- Indexing 505 \$t field as additional title instead of title
  - Impact: De-boosting records retrieved by table of content's titles vs records' main title
- Collection Discovery Optimization:
  - Display Collection's Items sooner while thumbnails are being loading
  - Similar experience as exists in the brief results
- Increase maximum number of conditions for Local Resource Types – Support five conditions per local resource type

# Additional Notable Items

- Give Us Feedback Tool - Add link to open the tool at the bottom of the Full Display in mobile



# Additional Notable Items

- NERS 6693 Add a new Operator “Equals exact phrase” to support the exact and only for Title, Creator and Subject fields
  - was moved to May release
- New Accessibility VPAT documents and accessibility roadmap for 2023 will be available soon in the Knowledge Center

# Sneak Peek for 2023 Q2

## Primo and Primo VE

Improving user's session timeout experience



Introduce new Resource Types filters under the Search Bar

**Primo VE** Support New Exact Type of "Equals" in the Advanced Search

NERS



Adding the ability to custom the OTB Resource Types rules and conditions

NERS



Linked Data - Author Info Card

My Library Card Improvement  
View Fines by Fine Status



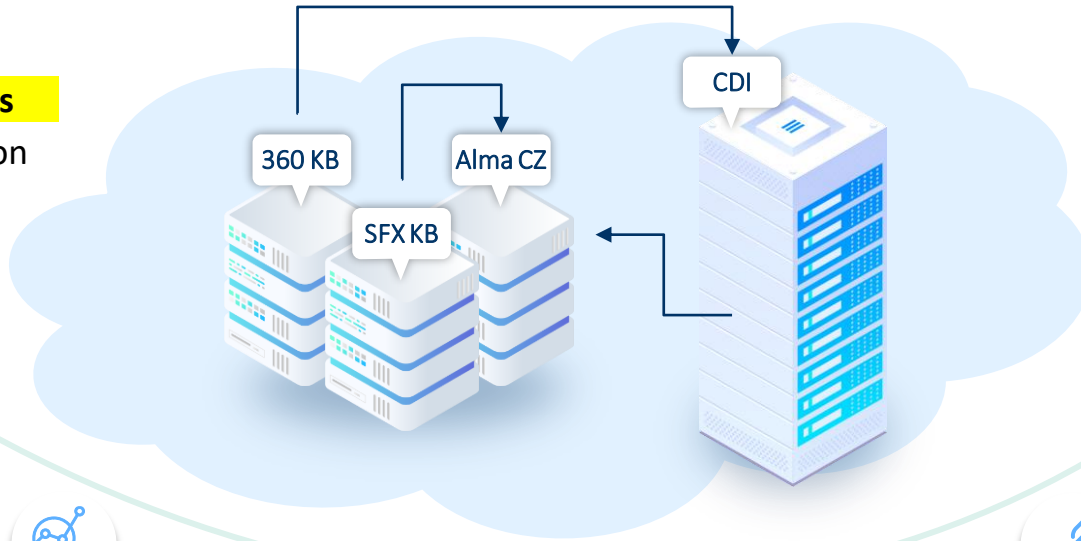


# Content and Data Excellence Update

# Content Across Our Services

## KBs/CZ

- **74,700 collections**
- 15% annual collection growth



## Central Discovery Index

- Books, articles, chapters, videos, datasets, more...
- **5.14 billion records**
- 10% annual record growth



Resource  
Management  
**Alma**



Discovery  
**Primo/Primo VE**  
**Summon**



Acquisitions  
**Rialto**



Research  
Workflows  
**Esploro**



Linking  
**SFX**  
**360**



Resource  
Sharing  
**Rapido**

# Data Excellence (DX)

Addressing the intersection between **Content**, **Technology** and **Users** as part of a data-driven cross-company strategy



Capacity,  
Efficiency, Speed  
and Provision,  
Quality

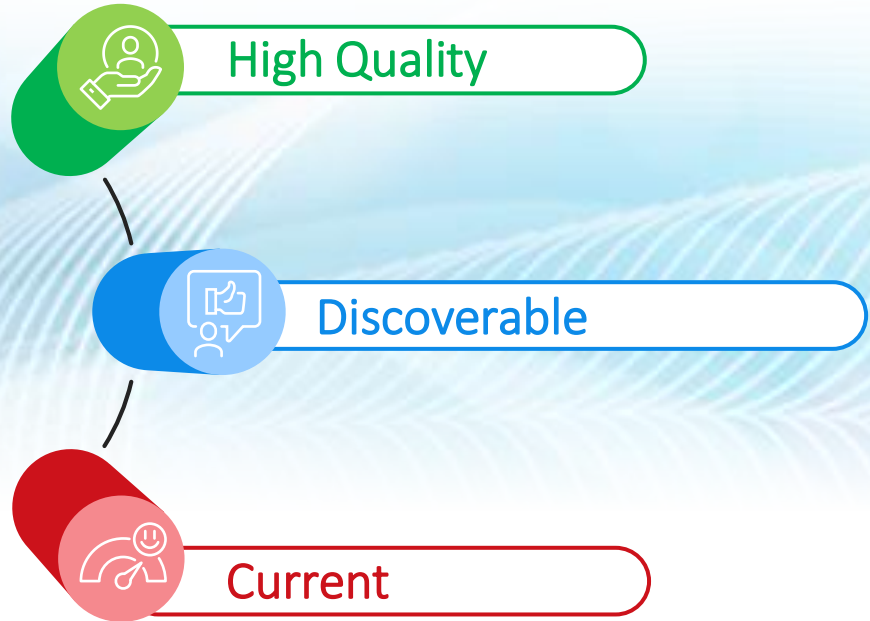


# Data Excellence (DX)

Addressing the intersection between **Content**, **Technology** and **Users** as part of a data-driven cross-company strategy



Putting the  
excellence  
in data



# Ebook Central book chapters in CDI

- November 2022 - first load of 55,000 records
- Gradually loading more until 20 million
- Will allow direct linking to chapter levels
- Boost search results



- 30 providers (+5 from Oct. 2022)
  - American Chemical Society
  - American Society for Microbiology
  - Cambridge University Press
  - 高等教育出版社 (Higher Education Press)
  - INFORMS
- Over 10,500 collections with 1.55 billion records
- Some usage metrics
  - Over 250 institutions with at least 100 clicks in November
  - Over 400 institutions currently active or testing
  - More than 300,000 clicks in November
  - Linking success rates – 99%

Provider	Content	Type of Quicklink (PDF/HTML)
ACM	All	PDF
Elsevier ScienceDirect	All	HTML
ProQuest	All Content excluding eBooks on the ProQuest Platform <a href="https://www.proquest.com">https://www.proquest.com</a>	HTML. In most cases a link to download the PDF full text is included in the HTML
Sage	Journals under <a href="https://journals.sagepub.com">https://journals.sagepub.com</a>	PDF/HTML
Springer	Journals and eBooks under <a href="https://link.springer.com">https://link.springer.com</a>	PDF/HTML
Wiley	Journals and eBooks under <a href="https://onlinelibrary.wiley.com">https://onlinelibrary.wiley.com</a>	PDF/HTML
Scopus	Journals Content under <a href="https://www.sciencedirect.com">https://www.sciencedirect.com</a>	PDF
IGOP Publishing	All	PDF
National Library of Medicine	Content which is part of PubMed Central as well as under <a href="https://pubmed.ncbi.nlm.nih.gov/">https://pubmed.ncbi.nlm.nih.gov/</a>	PDF/HTML
New England Journal of Medicine	Content under <a href="https://www.nejm.org">https://www.nejm.org</a>	PDF/HTML
Emerald	Journals and eBooks under <a href="https://www.emerald.com">https://www.emerald.com</a>	PDF/HTML
Chess Database	Content under <a href="https://www.chessdatabase.com/">https://www.chessdatabase.com/</a>	HTML
Thieme	All Journals content based on conference proceedings under <a href="https://www.thieme.com/med/Products/Books">https://www.thieme.com/med/Products/Books</a>	PDF/HTML
IEEE	Content under <a href="https://ieeexplore.ieee.org">https://ieeexplore.ieee.org</a>	HTML
Wiley-Interscience, Inc.	Journals under <a href="https://www.interscience.wiley.com/">https://www.interscience.wiley.com/</a>	PDF/HTML
gale	Content under <a href="https://www.gale.com/br/landing">https://www.gale.com/br/landing</a>	PDF/HTML
Chicago University Press	Content under <a href="https://press.uchicago.edu/">https://press.uchicago.edu/</a>	PDF/HTML
Royal Society Publications	Content under <a href="https://royalsocietypublishing.org/">https://royalsocietypublishing.org/</a>	PDF/HTML
Project MUSE	Journals and eBooks under <a href="https://muse.jhu.edu/">https://muse.jhu.edu/</a>	Journals (PDF/HTML) Books (HTML)
JSTOR	Only Journals Article under <a href="https://www.jstor.org/">https://www.jstor.org/</a>	PDF/HTML
American Institute of Aeronautics and Astronautics	Journals, Databases, Proceedings, Books under <a href="https://arc.aiaa.org/">https://arc.aiaa.org/</a>	Journals, Databases, Proceedings (PDF/HTML) Books (HTML)
Alexander Street	All	HTML
Taylor & Francis	All	PDF/HTML
Emerald Publishing	All	PDF
Wiley Scientific Publishing	Journals	PDF
Cambridge University Press	Journals, Books	HTML
American Chemical Society	Journals, Books	PDF/HTML
高等教育出版社 (Higher Education Press)	Journals	HTML
American Society for Microbiology	Journals	PDF/HTML
INFORMS	All	PDF/HTML

[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)

# Peer review in CDI

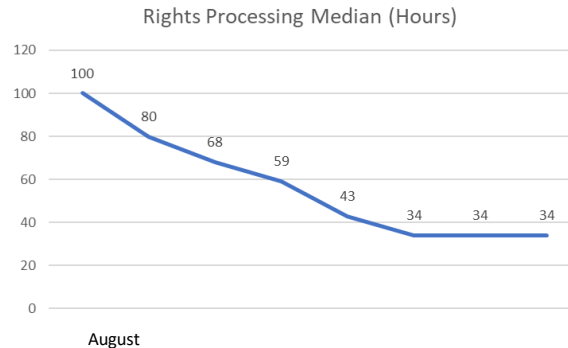
- Started from 506 million articles with Peer Review indication
- Now up to almost 551 million articles with Peer Review indication

*Meaning we added ~45M correct  
Peer reviewed indication.*



# Enhancing Rights in CDI

- Improving rights processing
  - Decreased turnaround from 72-45 hours to 30 hours in November
  - Additional improvements in progress throughout 2023
  - Goal to reduce processing time to 24-48 hours







# Community Engagement

# Roadmap Webinar & Annual User Group Meetings

- [2023 Primo Roadmap Highlights](#) on February 15
  - EMEA/APAC: 8 am (Helsinki); 2 pm (Singapore); 3 pm (Tokyo); 5 pm (Sydney)
  - AMERICAS/EMEA: February 15 at 11:00 am (New York); 4:00 pm AMERICAS
- We're looking forward to seeing you in person at ELUNA and IGeLU
  - [ELUNA 2023 Annual Meeting](#): May 9-12 in Los Angeles, CA
  - [IGeLU 2023 Annual Meeting](#): September 11-14 in Leuven, Belgium



# Thank you!

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