

Subject: [ulms-discovery] 2023 Late Spring VE Releases and recommendations
Date: Tuesday, June 20, 2023 at 10:35:34 AM Pacific Daylight Time
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To: Discovery system communication for ULMS project
Attachments: image001.png, image002.png, image003.png

Late Spring 2023

VE Releases & Recs

The following are recommendations for CSU campuses on which Primo VE features to implement. Releases have been tested in sandbox and production environments by the ULMS Discovery VE Testers Team (VETT).

Additionally, here are some key links for your reference:

- [ExLibris configuration documentation](#)
- [ULMS Discovery homepage](#)
- [VE testers Team \(VETT\) notes](#)

RECOMMENDED

None

There are no releases that are must-haves for all of the CSUs. However, a reminder that the old Metadata Editor (MDE) is no longer available.

OPTIONAL

Improving the User's Session Timeout Experience

Allows users to extend their OneSearch Session in three ways: 1) Extend their current session; 2) Extend their current session to the maximum limit (7 days, non-configurable); and 3) Extend their sessions automatically in their "My Account" setting.

Before enabling this feature, make sure to test and consider your campus' authentication protocols and how that may affect your user's overall experience using OneSearch. Also keep in mind the "extend the session" popup only shows for one minute.

Alternative is to change the default 60 mins timeout in Configuration > Discovery > Configure View > General.

- Go to **Configuration > Discovery > Authentication > User Authentication**
- **Select** from the three options to:
 - **Enable extending the session**
 - **Enable extending the session to maximum**
 - **Enable user setting for extending the session** - Must also go to Configuration > Discovery > Other > Customer Settings > display_user_settings: True
- Additional configurations include changing labels (Configuration > Discovery > Display Configuration > Labels > Aria Labels or User Tile Labels)

Support Exact Phrase Only Searches in Advanced Searches

Allows for an exact phrase search (instead of contains exact phrase). For example. A search for "Williams, John D." will **only** return "Williams, John D.". It will **not** return "Williams, John D. 1683" or "Williams, John(d. 1619)

- Go to **Configuration > Discovery > Display Configuration > Configure Views > Select view > Advanced Search Configuration**
- Select **Equals exact phrase**
- Additional configurations include changing labels (Configuration > Discovery > Display Configuration > Labels > Search Tile Labels)

Note: Under the Hypertext Linking configuration (Configuration > Discovery > Display Configuration > Hypertext Linking Definitions), the **search operator**

field has been changed from **exact** to **contains exact phrase**

Note: enabling this feature removes highlighting the searched term from the displayed page (for subjects and authors). Comment from ExLibris is that they will not be addressing the bug/feature

Note: a phrase in quotations marks in simple search is the same as **Contains exact phrase**

Suggestion: change the order of the operators and/or labels for the searching parameters to make it clear the difference between **Contains**, **Contains exact**, and **Equals Exact Phrase**.

Filter by Availability for Newspaper Search

Allows search results to return newspaper articles not available through the library's collection with the intent of being able to request through Rapido/ILL

- Newspaper search needs to be enabled
- Go to **Configuration > Discovery > Display Configuration > Configure Views > General > Select Newspapers Search Filter By Availability**

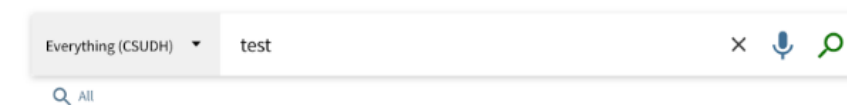
Not Recommended

Resource Type Filter Bar



New resource type filter ribbon that appears under the basic search box to allow users to filter their results by resource type. Looks like a visual representation of the resource-type filters but suffers from:

- Indexing for resource filter ribbon is different than filters
- Requires changing CSS to make sure that white icons/text is visible against the background



- Resource type will be stickied so requires a **Reset search** to perform a new search, not just new search in the search box

Note: ExLibris acknowledged that the results from the ribbon are different than the filters and are working on a resolution. TBD

Automatically enabled features

My Library Card - Filter Fines by Type

Allows users to filter fines based on the following fine types: **Active**, **All**, **Closed**, **In Dispute**, and **Transferred**. Consult with person handling fines/fees on potential language changes (e.g., change “fines” to “fees”)

The screenshot shows the 'My Account' page with the 'FINE + FEES' tab selected. A dropdown menu is open, showing filter options: 'All', 'Active Fines', 'In Dispute Fines', and 'Closed Fines'. The main content area displays a list of fines with columns for item type, amount, and fine date.

Item Type	Amount	Fine Date
1. Lost item	Debit 1.00 USD	05/15/2023
2. Overdue fine	Debit 3.00 USD	05/15/2023
3. Damaged item fine	Debit 1.00 USD	05/15/2023
4. Lost item replacement fee	Debit 1.00 USD	05/15/2023
5. Overdue fine Harry Potter and the deathly hallows / by J.K. Rowling ; illu...	Debit 1.00 USD	05/15/2023
6. Overdue fine	Debit 1.00 USD	05/15/2023
7. Damaged item fine	Debit 0.00 USD	05/15/2023
8. Lost item replacement fee	Debit 0.00 USD	05/15/2023

Page Number Realignment in Journal and DB Search Results

For mobile devices, the page number for Journal and Database search results now displays next to the record count instead of below it.

Improve the Usability of Resource Recommender

Administrative or Management Pages

Makes the **Resource Recommender Configuration (Configuration > Discovery > Other: Resource Recommender Configuration)** much easier to navigate by adding page numbers, results per page, and the ability to search

Support Customization of Resource Type Mapping

Allows custom mapping of local resources (**Configuration > Discovery > Display Configuration > Resource types configuration**). Considered with Resource Management Committees, particularly for secondary resources. [See Technical Services meeting from June 15, 2023](#)