

2023 Summer/Fall VE Releases and recommendations

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To:Discovery system communication for ULMS project <ulms-discovery@lists.calstate.edu>

2023 Summer/Fall

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.

OPTIONAL

Highlight Selected Record in FRBR Version List

When opening the list of FRBR versions for a record in search results, the selected record appears above the complete list of FRBR versions, starting with the preferred record. Requires **FRBR**.

- Go to **Configuration > Discovery > Display Configuration > Configure Views > Brief Results Tab**
- Under "Dedup and FRBR" > select **Highlight the record you came from**

Display Document Attributes for CDI Records

Displays additional attribute types (shown in filter search) from **select databases** (PubMed, BMJ, Springer, Elsevier, Alexander Street Press, ArXiv, Crossref) to include the following

- **Primary Source**
- **Preprint**
- **Retracted Publication**
- **Withdrawn Publication**
- **Retraction Notice**
- **Withdrawal Notice**
- **Publication with Expression of Concern**
- **Publication with Addendum**
- **Publication with Corrigendum**
- Go to **Configuration > Discovery > Display Configuration > Configure Views > General**
- Select the **Display CDI document attributes**
- Additional configurations include changing labels (Configuration > Discovery > Display Configuration > Labels > Facet Resource Type Labels)
- Additional configurations include changing labels (Configuration > Discovery > Display Configuration > Labels > Results Tile Labels)

Display Item Policy in Get It

Allows you to display the Item Policy if the field is configured to display in Get It > Location Items

- Go to **Configuration > Discovery > GetIt Configuration > Items Display Configuration**
- Go to Display Items > Brief Item Display > **Enable the Item Policy Field**

Resource Filter Bar - Search Results match Facets

Previously a not recommended feature but Ex Libris has since changed their configuration so that the search results match the facets.



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:

- **Go to Configuration > Discovery > Display Configuration > Configure Views > Advanced Search Configuration**

- Go down to **List of Resource Types** and **Select Enable for Basic Search**
- Will also need to make sure all of the resource type icons are being used
 - **Go to display > configure view > brief results: Resource Type Filter Bar > Customize > select/deselect resource type**
 - Example: CSUDH doesn't use Collections as a resource type so that would be deselected
- Filter bar cannot be enabled when either the basic search pre-filter for resource types or indexes is enabled on the Advanced Search tab
 - **Go to Configuration > Discovery > Display Configuration > Configure Views**
- 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

Not Recommended

My Library Card Improvements

Allows patrons to choose which letters to receive under their **My Accounts**. Not recommended to ensure that patrons receive the letters they should and prevent accidental miscommunications.

Allow Authentication for Customized List of Institutions

Not applicable for the CSUs

Enhanced "May Also Be Held by" Service

Not applicable for the CSUs

Long Term Digital Loans - Support Patron Workflow

Not applicable for the CSUs

Automatically enabled features/Quality of Life

Add Customized Values Usage Subject Area to Primo Analytics

Primo Customized Values Usage subject area has been added to Primo Analytics

Improve Performance of Browse Search

Improves response time for **Browse** searching. Important to note:

- Dedup/FRBR is disabled in Browse Search when this functionality is enabled.
- The total number of browse results does not appear next to the page's details.
- Requires contacting Ex Libris to **disable**

Support Additional Resource Types for CDI

Additional resource types from **CDI** now include **Magazines**, **Magazine Articles**, and **Questionnaires**

Support Webhook Records from Featured Results

For those using Search Webhook, you can now use Featured Results to show search results from your Search Webhook scope

MISC.

Resource Recommender - Enhanced Search Capability

Feature moved to November release

Secondary Resource Type Enhancements

Being addressed by Resource Management Group

