2024 Winter

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

Enable Users to Filter or Expand Citation Trail Results

Users can enable/disable the expansion of citation trail results to include results outside of the library's database.

- Go to **Configuration > Discovery > Display Configuration > Configure Views**
- Under the "Edit Citation Service" and uncheck "Filter by availability"

Support Restricted Availability Statuses for External Records

Display a different availability status for records with restricted or no access to full text for external data sources.

- Go to **Configuration > Discovery > Loading External Data Sources > Discovery Import Profiles**
- Under the profile(s) you want to change the availability calculations for > **Delivery > Link to resources** or **Link to Resources** – Other Statuses, double check settings
- Additional configurations include changing labels (Configuration > Discovery > Display Configuration > Labels > Calculated Availability Text Labels)

OPTIONAL

Activating the New Unpaywall Collection

Activate the Unpaywall collection in the Alma CZ and SFX KB to allow:

- The Unpaywall collection appears under the Collection facet in Primo/VE.
- CDI manages and prioritizes Open Access (OA) full text links for Unpaywall records and displays them with the other Link in Record OA links in Primo/VE.
- CDI updates the Unpaywall collection weekly.

Follow recommend Unpaywall [configurations/enabling here](#).

Improve Search Experience for No Results Found

Ability to set whether searches that return no results will automatically expand the search to include CDI collections that have not been activated in Alma; indicates to users whether or not search has been expanded. Did not seem to work for NZ items but did work for CDI items.

- Go to **Configuration > Discovery > Other > Customer Settings**
- Set the **expand_my_results_when_no_results** parameter to **true**
- Additional configurations include changing the label under **Configuration > Discovery > Display Configuration > Labels > Results Tile Labels**

Enable Setting of Personal Delivery Locations from Hold Request Form

Users can select a personal delivery location (such as home or work) and either add or modify its details on the Request Form. Useful when patrons require delivery to locations not listed in their Alma account; may run into issues of missed delivery. Campuses that have this feature enabled should consult with their circulation department.

- Go to **Configuration Menu > Discovery > GetIt Configuration > Hold and Booking Request**
- Change labels under **Configuration > Discovery > Display Configuration > Labels > Request Labels**
  - almaRequest.addressLine1 – Address Line 1 a
  - almaRequest.addressLine2 – Address Line 2
  - almaRequest.addressLine3 – Address Line 3
  - almaRequest.addressLine4 – Address Line 4
  - almaRequest.city – City
  - almaRequest.stateProvince – State/Province
  - almaRequest.postalCode – Postal Code
- Go to **Configuration > Fulfillment > Patron Configurations > Additional Personal Delivery Address Types >** enable up to 10 additional addresses (P_DELIV_ADDRESS_1 – Personal delivery address type ##)

Not Recommended

None for this release

Automatically enabled features/Quality of Life

Preserve the Formatting of Citations Copied from Primo

The Citation export action now saves the citation to the clipboard in Rich Text Format (RTF) and retains the citation's formatting when copied to Word documents

Resource Recommender - Enhanced Search Capability

Allows for a few additional, non-exact-match searching. For example, *FDA* also includes *Food and Drug Administration*; *History* includes *Histories*; *Harry Potter* includes *Potter Harry* and *Harry Potter and the Philosopher's Stone.*

Primo Analytics - Track Provider for Quicklink Actions You

can now track the selection of HTML and PDF Quicklinks based on the provider

Resource Type Filter Bar Improvement

Previously, you could activate a maximum of 10 resource types. With this enhancement, you can now activate a maximum of 10 resource types for each search profile slot

Enable the Use of Discovery Showcase Widgets in External Domains

provides external domains permission to embed Discovery Showcase widgets in their website to display specific queries, collections, and new books. Institutions can define which domains are permitted to embed the widgets – [instructions here](). This is the first part of enabling a new books carousel (coming later)

CSL Upgrade

APA 7th edition now working as intended for books and articles; may want to include link to individual campuses' citation guide.

Loading Records from External Sources

Import UNIMARC records from external sources into Primo VE for discovery in your local catalog. Might be good to contact vendors for this option

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MISC.

Create Local Keys for FRBR/Dedup Matching

Update how records are matched for FRBR and Dedup to be able to create a maximum of 20 local keys. Working with ERM on best practices.