



IGeLU Primo Working Group

Open Business Meeting 2022

Agenda

- Group members & changes
- Activities
 - Enhancements
 - NERS 2022
 - NERS 2021
 - NERS 2020
- Advocacy items
- Community support
- Future plans
- Q&A



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Primo Product Working Group

About

The objective of the IGeLU Primo Working Group is to collaborate with Ex Libris in developing new services and functions for Primo. A core activity is conducting the annual enhancements voting process, in collaboration also with the [ELUNA Primo Working Group](#). Other activities include planning for the annual IGeLU Conference and regular meetings with Ex Libris Product Management to discuss future directions and current issues relating to Primo

The Primo listserv is hosted by IGeLU / ELUNA and is managed collaboratively by the IGeLU Primo WG and the ELUNA Primo WG. The listserv supports communication, collaboration, and knowledge sharing between members of the Ex Libris users community. Subscription approval is by institution domain email for recognisable individuals employed at sites licensing Ex Libris products, and Ex Libris staff and affiliates by email domain. Distribution lists and institution managed group email accounts (ie where recipients and posters are anonymous) will not be approved. Periodic review may result in removal. Posts are only permitted by subscribers and posts should not be distributed beyond eligible subscribers.

Subscribe: <https://exlibrisusers.org/postorius/lists/primo.exlibrisusers.org/> and Post: primo@exlibrisusers.org

Contact the Coordinator at primo@igelu.org



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Group members & changes

Member	Site	WG Role
Stacey van Groll	University of Queensland, Australia	Coordinator, Conference Planning, CDI Advisory Group
Lee Houghton	Nottingham Trent University, UK	Deputy Coordinator & Enhancements Coordinator
Noémie Ammann	ETH Library, Switzerland	Liaison to the Content WG
Gaith Bader	University of New South Wales, Australia	Enhancements Team
Paul Harding	University of York, UK	Liaison to the Analytics CoP & Enhancements Team
Mark Kluzek	University College London, UK	Liaison to the Linked Open Data CoP
Ulrich Leodolter	OBVSG, Austria	Liaison to the Developer Community
Jennifer McNally	University of Salford & WHELF, UK	Liaison to the Consortia CoP & Enhancements Team
Manuela Schwendener	Universität Basel, Switzerland	Enhancements Team
Andrea Zech	Free University Berlin, Germany	Enhancements Team
Nir Zinger - <i>welcome!</i>	University of Haifa, Israel	Enhancements Team

- Farewelled
 - Boaz Dotan, University of Haifa, Israel
- Liaison from the Alma WG – *vacant from December 2021*
- Liaison from the IGeLU Steering Committee – Asbjørn Risan

NERS 2022

Up to February 5: NERS open for submission of enhancement requests

- 129 submissions by deadline, which were then reviewed by the Enhancements Team, of IGeLU and ELUNA Primo WG members
- Total processed included 8 submissions moved from Alma > Primo (n/a from Primo > Alma)
- 21 Not Votable: 15 merged, 2 rejected, 4 already supported

March 20 – April 16: Voting for IGeLU & ELUNA members (*extended 1 week due to system issues*)

- 108 Votable submissions
- 56,033 votes placed by 378 accounts – **MOST VOTES EVER!**

NERS 2022 - continued

Full voting results given to Ex Libris Primo Product Management, with request for assignment of development points to the Top 20 (per the *Product Development Collaboration Agreement*)

April 20 – June 16: During scoping and pointing discussions

- 3 requests were rejected, including the No.1 ranked request
- Also pointed solutions for some requests were different from the original description

The Primo WG/s Enhancements Team determined that another opportunity for member community voice was needed, via an additional voting round

June 19 – July 3: Additional Voting for IGeLU & ELUNA members

- 17 Votable submissions = 47,645 votes placed by 294 accounts

NERS 2022 - continued

Results, to be delivered within one year – 205 points, with 5 borrowed from 2023

*Reminder: 2022 is our first year of 200 points for Primo, up from 150 points. This is by the 2021 revision to the Product Development Collaboration Agreement, through the collaborative negotiation efforts of the IGeLU and ELUNA Steering Committees with Ex Libris - **thank you!***

Rank	ID	Title	Votes	Points
1	7809	Enable patrons to check 'Keep me signed in' (VE/BO)	4,288	45
2	6729	Prevent Autocomplete suggestions from non-activated sources in CDI (VE/BO)	4,244	20
3	7859	Add barcode search to Primo (VE/BO) - COMING EARLY 2023	3,985	25
4	7700	Better UX for changing number of titles per page (VE/BO)	3,979	15
5	7186	Collection Discovery usage in Primo Analytics (VE/BO) - COMING NOV 2022	3,643	15
6	7790	Requesting Flexibility in Local Resource Type Configuration (VE)	3,614	50
7	7986	Add "Starts With" Functionality to Call Number in the Advanced Search (VE/BO)	3,459	35

NERS 2021 Update

ID	Title	Delivery
6693	Primo VE: Advanced search: add support for “exact only” <i>Scoped only for Primo VE and CDI on solr, as not feasible for Primo with Back Office on lucene. The solution for Primo VE and CDI is for targeted fields of author and subject (and potentially title), due to size and complexity of indexed data, particularly in CDI</i>	Nov 2022
7402	Add granular localization options for Collection Discovery	Nov 2022 BO Aug 2022 VE
7199	Enhance the database search to include keyword searching	Feb 2022 BO Feb/Mar 2022 VE
7371/7430	Report a problem for records in Primo & Add integrated error reporting functionality to Primo <i>Several additional refinements across Aug & Nov 2022 releases, and into 2023 Roadmap</i>	May 2022
7265	After advanced search, show top of results list <i>Additional refinement in Aug 2022, for retention of last choice user setting</i>	May 2022 BO Mar/Apr 2022 VE

ID	Additional items delivered – no points required as already on Roadmap	Delivery
7364	Easily check which activation in Alma is causing a specific record to appear in CDI (<i>was voted No.1</i>)	Oct 2021
7311	Display both Link in Record and Link Resolver in View It for CDI records (<i>was voted No.3</i>) <i>Note: An issue with this breaking Direct Linking with TBC fix Nov 2022 or Feb 2023</i>	May 2022 BO Apr 2022 VE

NERS 2020 Update

Finalising delivery for the few remaining items (others delivered fully in 2021)

ID	Title	Delivery
6718	Add Journal Coverage Dates to Brief Results Page	Feb 2022 BO Nov 2021 VE
6702	Ability to dedup or FRBR between local data and CDI data #6702 <i>The solution will allow more control for customers not by grouping the results, but rather allowing more control on the activation side such as to not include a Book package from CDI, which will mean no duplicates with the local Books, but to choose to still include all the Book Chapters of that package</i> <i>UPDATE: Nov 2021 Phase 1 option is 'all-or-nothing' ie opt-in to not surface any CDI Books. Aug 2022 Phase 2 was to not surface CDI Books where the ISBN is locally full text active</i>	Phase 1: Nov 2021 Phase 2: Aug 2022

Delivery monitoring: <https://igelu.org/products-and-initiatives/product-working-groups/primo/primo-enhancements/>

Advocacy items

- **Angular upgrade transition**, inclu. consultation on timelines for rollout and communications
- **Third Party addons** responsibility, inclu. support, fixes, and upgrades, such as APA 7th
- **CDI Advisory Group** commenced May 2022 (proposed Oct 2020)
- Fortnightly meetings ongoing through 2022 (from May 2021) with CDI VP Development, collaborating on **key CDI issues** inclu. feeding into the Data Excellence initiative
- Fix for Primo Analytics for **accurate actions for non-UTC** timezones (raised August 2021 > corrected April 2022)
- Timing shift for APAC BO, **resolving issues for Saved Search Alerts** by taking them out of alignment with CDI Updates (fixed May 2022)
- Expectation of **equitable development and functional parity for all Primo customers** whether on Primo BO or Primo VE
- Support for **opt-in development**, rather than opt-out or mandatory
- **GDPR** Focus Group Report support for Primo related items and development via a user personalization menu
- **Accessibility** standing item, keeping focus strong and raising issues with initial coverage and prioritising timely fixes
- Early access testing, feedback, and collaborative help content re-write for the **CDI Activation Analysis Tool** (NERS #7364)
- Encouraging Ex Libris engagement with the community through **Idea Exchange responses**, particularly for top voted submissions
- Improvements to accuracy and detail of Primo **Release Notes and Resolved Issues**, and addition of Primo-related CDI Release Notes
- **Additional fix for CDI addata** in Link Resolver, for missing publication title for Text Resource and Report typed records (June 2022)
- Plus **ongoing consultation items** as raised by Ex Libris, eg VE Dedup keys, VE MARC, pagination change, search ribbon, and login for email

Community support

- Transitioned Primo content to the newly launched IGeLU website Feb 2022, including our one-stop-shop progress monitor for **Primo Enhancements** (also enhanced to cover from 2014 onwards):
<https://igelu.org/products-and-initiatives/product-working-groups/primo/primo-enhancements/>
- Created new Community Support area for Primo on the IGeLU website May 2022, hosting **Primo – Useful bookmarklets**, as a compilation of the work of Ex Libris and many named community members:
<https://igelu.org/products-and-initiatives/product-working-groups/primo/primo-community-support/>
- Commenced sharing regular updates on our work via publishing monthly meeting **Minutes** on the new IGeLU site from 2022 onwards: <https://igelu.org/products-and-initiatives/product-working-groups/primo/minutes/>
- Supported the work of other IGeLU & ELUNA groups, including consultation and feedback on the **Linked Open Data CoP's URI Report** and the **Content WG's CDI Pain Points Report**
- Working collaboratively with our ELUNA Primo WG colleagues and Ex Libris to prepare for the **Angular 1.8** transition in November 2022, including Ulrich's presentation in the July 7th webinar: *Preparing for the Angular 1.8 Upgrade in Primo/Primo VE* and likely another upcoming webinar in late September

Future plans

- **Transitioning to the new NERS platform for 2023 enhancement cycle: Aha**
- Working with Ex Libris and our ELUNA Primo WG colleagues on delivery of enhancements, including consultation, testing, and feedback
- Ongoing collaboration with Ex Libris and ELUNA Primo WG for Angular/UI development planning, and support for community
- Collaboration with community and other WGs and CoPs in liaison activities, and in cross-group initiatives including the CDI Advisory Group
- Continuing to support and advocate for community issues, as they arise
- Conference preparations for 2023

Q & A

Any questions?