IGeLU Primo Working Group

Open Meeting – IGeLU Conference 2023

Agenda

- **Members and updates**
- **Enhancements**
  - NERS 2023
  - NERS 2022 + 2021
- **Advocacy**
- **Support**
- **Plans**
- **Q & A**

IGeLU
INTERNATIONAL GROUP OF EX LIBRIS USERS

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Primo Product Working Group

ExLibris

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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Special Projects
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Members & updates

Member	Site	WG Role
Stacey van Groll	University of Queensland, Australia	Coordinator, Conference Planning
Mark Kluzek	University College London, UK	Deputy Coordinator
Nir Zinger	University of Haifa, Israel	Enhancements Coordinator, New XP Focus Group
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, New XP Focus Group
Ulrich Leodolter	OBVSG, Austria	Liaison to the Developer Community
Jennifer McNally *(departing)*	University of Salford & WHELF, UK	Liaison to the Consortia CoP & Enhancements Team
Manuela Schwendener	Universität Basel, Switzerland	Enhancements Team, New XP Focus Group
Andrea Zech	Free University Berlin, Germany	Enhancements Team

- Farewelled
  - Lee Houghton, Nottingham Trent University, UK *(Deputy Coordinator + Enhancements Coordinator, and member from 2017)*

- Liaison from the Alma WG – *Emma Clift, Macquarie University*
- Liaison from the LOD CoP – *Ebe Kartus, National Library of New Zealand*
- Liaison from the IGeLU Steering Committee – *Asbjørn Risan, UNIT*

Enhancements - NERS 2023

Up to January 28: NERS open for submission of new enhancement requests

- 141 submissions, reviewed by Enhancements Team of IGeLU and ELUNA Primo WG members

- 3 submissions moved from Primo > Alma and 1 moved from Alma > Primo

- 19 Not Votable: 9 merged, 5 Roadmap, 2 withdrawn by submitter, 3 already supported

March 12 – April 2: Voting for IGeLU & ELUNA members

- 119 Votable submissions

- 51,229 votes placed by 332 accounts – **quite a drop from last year… bad timing?**

NERS 2023 - 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)

- *Update this year:* Provided also the total numbers of accounts voting on each submission, for valuable information for Primo PM to know extent of community interest regardless of total votes

April 7 – June 14: Scoping and pointing discussions *(extended two weeks)*

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

- High number of points for some submissions, including in the very top ranked

- Varying scoped solutions for some submissions

- Removal of three submissions (1 Roadmap #8292, 1 rejected #8206, 1 BO/VE alignment #8130)

June 19 – July 2: Additional voting for IGeLU & ELUNA members

- 17 Votable submissions = 46,431 votes placed by 298 accounts – **additional rounds always lower votes**

NERS 2023 - continued

Results, to be delivered within one year – 195 points, with 5 borrowed last year

Rank	ID	Title	Votes	Points
1	8126	Ability to do a bulk export of search results (VE/BO)	6,569	120
2	8210	Prevent search results expansion by use of exact phrase (VE/BO)	5,564	55
3	8134	Allow HTML coding in labels, public notes and collection description (VE/BO)	5,284	20

#8134: The ELUNA and IGeLU Primo WG/s are working with Ex Libris Primo PM on the list of labels, per scoping statement

Thank you to Primo PM for also adding the following to the 2024 Roadmap

Rank	ID	Title	Votes	Points
5	8157	Preserve the formatting of citations copied from Primo (VE/BO)	3,503	n/a 15
14	8141	Add ability to configure the display at the item level and the location level in the GetIt section (VE)	1,102	n/a 10

NERS 2022 + 2021 Update

ID	2022	Delivery
7809	Enable patrons to check 'Keep me signed in' (VE/BO)	May 2023
6729	Prevent Autocomplete suggestions from non-activated sources in CDI (VE/BO)	**TBC**: Targeting for Nov 2023
7859	Add barcode search to Primo (VE/BO)	Feb 2023
7700	Better UX for changing number of titles per page (VE/BO)	Feb 2023
7186	Collection Discovery usage in Primo Analytics (VE/BO) • *Originally planned Nov 2022, but design revisited from Actions Usage subject area to introduce a new Customized Values subject area*	Aug 2023
7790	Requesting Flexibility in Local Resource Type Configuration (VE) • *Continuing enhancements, including in August 2023*	May & June 2023
7986	Add "Starts With" Functionality to Call Number in the Advanced Search (VE/BO)	Feb 2023

ID	2021	Delivery
6693	Primo VE: Advanced search: add support for "exact only" #6693 • *Planned Nov 2022 > Feb 2023 > May 2023 for title, hypertext linking, and configuration options*	May 2023

Advocacy +

- **Angular upgrade transition** support, from May through Nov 2022 Release

- **Primo case handling** by workflow review to resolve inconsistent release updates Nov 2022

- **Information boost** by inclusion of Q&A section in Primo webinar recordings Jan 2023

- **Feedback tool** feature expansion - delivered May 2022 and enhanced Aug + Nov 2022 and Feb 2023

- **GDPR support** with Search History settings added Aug 2022 and default adjusted Feb 2023

- **Search within full text** improved with URL retention added Feb 2023

- **API support** for Primo VE, raised Mar 2022 and added May 2023

- **AI enhanced** Jul 2023 covering more scenarios of citation searches with Grobid, and raising issue of machine learning tools impact on Analytics data

- **Resource Type Filters** documentation and feature improvements, with alignment of VE with BO views granularity advised planned 2nd half 2023

- **Contributing to SC collective calls to action**, with input to support concerns to senior level Feb 2023

- **Accessibility standing item**, regularly raising issues with new feature coverage, timely fixes, and documentation for community information

- **Analytics issues** raising including QA for new features and regressions, in collaboration with Analytics CoP

- **Encouraging Ex Libris engagement** with the community, including through Idea Exchange

Support

- New resources added to the **Primo Community Support** page on the IGeLU website: https://igelu.org/products-and-initiatives/product-working-groups/primo/primo-community-support/

  - **Primo Sites and URLs**, a compilation of 450+ sites useful for work such as environmental scans --- **(watch this space for ELUNA Primo WG expansion work)**

  - Also links to **PrimoViews.org** created by Primo WG member Manuela, and to our ELUNA Primo WG sister site for customisation resources

- **Did you know?** We share regular updates on our work via publishing monthly meeting **Minutes**: https://igelu.org/products-and-initiatives/product-working-groups/primo/minutes/

- Half of the Primo WG members are **presenting sessions at IGeLU 2023 Conference**, sharing their work collaboratively with our community: Andrea, Gaith, Jenny, Stacey, Ulrich

Plans

- **Enhancements delivery planning and monitoring**, including testing and feedback

- **Feature alignment project** for Primo Back Office > Primo VE, in collab with ELUNA Primo WG

- **CDI enhancements handling** considerations, with 50 points from Primo > CDI trial in 2024

- **Platform transition for NERS** (New Enhancement Request System)

- **New Discovery Experience Focus Group**, started July 2023

- **Collaboration with WGs and CoPs** in liaison activities, and in cross-group initiatives such as expression of DEI and CDI collections in Primo

- **Community advocacy and support**, as issues arise directly or on the Primo listserv

- **Conference planning preparations** for 2024

Q & A

Any questions?