

# **Primo BO to VE Feature Alignment Project Report**

ELUNA Primo Working Group / IGeLU Primo Working Group

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April 2024

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# Executive Summary

In June 2023, the **IGeLU Primo Working Group** and the **ELUNA Primo Working Group** initiated the **Primo BO to VE Feature Alignment Project** with three key objectives:

1. Identify primary obstacles hindering Primo Back Office sites from transitioning to Primo VE
2. Identify primary challenges encountered by sites already using Primo VE
3. Present a prioritized list of development items to Ex Libris Primo Product Management

It is important to note that while there is no contractual obligation for the fulfillment of these recommendations, it is our hope that the presented prioritized items will be given strong consideration for development. This aligns with our shared objective of improving product offerings, reducing limitations, and fostering a cohesive community on Primo VE.

## Top recommendations

The following items are highlighted as feature capabilities required and infrastructure concerns, for beneficial development for all Primo VE sites:

	Top feature capabilities required		Important infrastructure concerns
1	Ability to edit <b>OTB search, facet, adddata, browse rules</b> . Limited to use cases outlined. <a href="#">See Use Case document.</a>	1	Improve <b>performance</b> for search results and facets (speed of UI)
2	More than 10 <b>Local Fields</b> for search/facet norm rules should be available	2	Alma <b>outages</b> , including maintenance windows, should not cause Primo outages
3	For <b>local resource type configuration</b> , up to 5 conditions can be configured per type, but this should be higher. Customers should be able to configure the <b>Database</b> type	3	Exclude " <b>Ghost Records</b> " from results
4	Ability to create multiple <b>mapping tables</b> for use in normalization rules	4	For <b>Collection Discovery</b> , new and removed titles should be automatically reflected in Primo.

Additionally, the following items are highlighted for consortium environments:

Consortium: Top feature capabilities required and infrastructure concerns			
1	Need more <b>local display fields</b> (in BO each IZ had 200)		
2	Need a <b>distribution mechanism</b> for normalization rules so that each IZ doesn't have to copy/paste them separately		
3	Need <b>admin role</b> that can adjust configuration for each IZ without requiring a separate login for each IZ.		
4	Fix bug: when an IZ enables <b>FRBR/Dedupe</b> , the print inventory of all the other IZ in the NZ is hidden when there is electronic inventory too		

Additional detail is available in the **Analysis discussion** and **Recommendations** sections.

# Project report

## Introduction

The origins of this project trace back to a closed meeting at the ELUNA Annual Meeting in May 2023, attended by the ELUNA Primo Working Group, the IGeLU Primo Working Group Coordinator, and Ex Libris Primo Product Management

During this meeting, Ex Libris attendees expressed strong desire for the remaining Alma and Primo Back Office sites to transition to Primo VE, with suggestion of encouraging this via identification of significant prioritized hindrances with the help of the IGeLU and ELUNA Primo Working Groups, and subsequent Ex Libris allocation of development efforts accordingly.

It was collectively agreed that the primary focus is the user experience in the Primo discovery environment. As such, the objective of this initiative is not to replicate the experience of staff back-end configuration in Primo Back Office, but to empower libraries with the continuing and enhanced ability to provide rich discovery features and services through system configuration options and functionality in Primo VE. In sum, a focus on 'feature alignment', as opposed to 'configuration parity'.

In light of these discussions and shared goals, the IGeLU Primo Working Group and ELUNA Primo Working Groups initiated the Primo BO to VE Feature Alignment Project in June 2023. A key emphasis of the project group was ensuring all Primo customers an opportunity to provide input, including those currently utilizing Primo Back Office, those who have transitioned from Primo Back Office to Primo VE, and those who have exclusively used Primo VE.

It is noted that this body of work has been conducted at a time where Ex Libris has stated there are no plans to sunset Primo Back Office and that customers are not forced to transition to Primo VE, while also concurrently developing the Four Pillars of the Next Discovery Experience only for Primo VE customers ([Ex Libris Announces Development and Ongoing Release of Next Discovery Experience](#), Press Release October 2023). There is also a clear decline in features in the Primo Back Office 2024 Roadmap ([PDF 5 pages](#)), as opposed to the Primo VE 2024 Roadmap ([PDF 10 pages](#)).

These four initiatives represent a significant phase of development for Primo, covering introduction of Linked Open Data features, a new user engagement journey focused Primo Analytics interface, integration of AI capabilities including conversational search, and a redesigned user interface.

The practical outcome of this product development direction only for Primo VE is to place considerable pressure on Primo Back Office customers. These customers face the challenge of balancing the desire to take advantage of beneficial strategic directions of Primo product development being implemented in Primo VE with the implications of sacrificing or degrading feature capabilities by configuration opportunities still only available through the Primo Back Office interface.

In this project, the IGeLU Primo Working Group and ELUNA Primo Working Group seek to support the Primo user community by working collaboratively with Ex Libris to resolve this challenge, with collective benefit for all Primo customers. To this end, the project key objectives focused on identifying significant concerns with current Primo VE development when compared to Primo Back Office capabilities, and providing these as a clear prioritized list to Ex Libris. The corresponding expectation is for prioritized allocation of resources to additional Primo VE product development, resolving these challenges and allowing Primo Back Office customers to transition to Primo VE.

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## Project structure

The project was split into two phases:

- **Phase 1 - June-December 2023**

The project group compiled an extensive (but not exhaustive) list of known variations and concerns between Primo Back Office and Primo VE.

The list was then vetted and curated for defects, existing support, transition issues, duplicates, reasonable workarounds, imminent Roadmap items, and customisation options.

- **Phase 2 - January-April 2024**

The project group developed a survey for community feedback from the Phase 1 list, which was further sorted into higher, medium, and lower impacts and supplemented by references to extensive additional detail and use cases. The survey offered the opportunity for respondents to assess the importance of individual items, as well as provide additional comment.

The survey was released in March 2024, with survey analysis and report writing in April 2024.

In April 2024, this Primo BO to VE Feature Alignment Project Report is submitted to Ex Libris Primo Product Management, in addition to the ELUNA Steering Committee and the IGeLU Steering Committee.

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## Primo terminology

The deployment model terminology for Primo can be a source of confusion for the user community. There is “Primo” for sites managing the Primo discovery environment by the Primo Back Office interface, and “Primo VE” for discovery management by configuration integrated within the Alma Higher Education Platform, while both are deployment models of “Primo” as a contracted product and both use the “New UI”.

For ease and speed with communications and collaborative discussions, the user community has for several years used shorthand terminology of “Primo BO” or simply “BO” for Back Office and “Primo VE” or simple “VE” for Primo VE.

In 2022 it was noted that Ex Libris had begun referring to Primo managed by Back Office as “Classic Primo” or “Primo Classic”, as distinct also from the deprecated “Classic UI”.

To ensure clarity throughout this report for the project focus on the two deployment models for Primo as a product, this report utilizes the following shorthand terminology:

- Primo managed by Back Office - **Primo BO** or **BO**
- Primo VE managed by Alma - **Primo VE** or **VE**

## Project members

The project group comprised three members from the **Ex Libris User Group of North America (ELUNA)** Primo Working Group and five members from the **International Group of Ex Libris Users (IGeLU)** Primo Working Group.

All members have extensive experience using the Primo Back Office interface.

Among the eight project group members, four have transitioned from Primo Back Office to Primo VE, and two others are currently in the “Go VE” Enablement phase for Primo VE.

Additionally, three members have consortium experience.

ELUNA	IGeLU
<p><b>Corinna Baksik</b> - <i>Project Co-Lead</i>            ELUNA Primo Working Group member, and prior Chair            Harvard University (Alma, Primo Back Office Single Tenant hosted)</p>	<p><b>Stacey van Groll</b> - <i>Project Co-Lead</i>            IGeLU Primo Working Group Coordinator            University of Queensland (Alma, Primo Back Office Multi Tenant hosted. Primo VE enabled by Go VE)</p>
<p><b>Anne Pepitone</b>            ELUNA Primo Working Group Chair            University of Washington (Alma, Primo VE. Previously Primo Back Office Multi Tenant hosted. Consortia)</p>	<p><b>Andrea Zech</b>            IGeLU Primo Working Group member            Free University Berlin (Alma, Primo VE. Previously Primo Back Office Multi Tenant hosted)</p>
<p><b>Jeff Peterson</b>            ELUNA Developer community            University of Minnesota (Alma, Primo VE. Previously Primo Back Office Single Tenant hosted)</p>	<p><b>Nir Zinger</b>            IGeLU Primo Working Group member            University of Haifa (Alma, Primo Back Office Multi Tenant hosted. Primo VE enabled by Go VE)</p>
	<p><b>Noémie Ammann</b>            IGeLU Primo Working Group member            ETH Library (Alma, Primo VE. Previously Primo Back Office Multi Tenant hosted. Consortia)</p>
	<p><b>Ulrich Leodolter</b>            IGeLU Primo Working Group member            Austrian Library Network and Service (OBVSG) (Alma, previously Aleph, Primo Back Office Locally hosted. Consortia)</p>

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# Community survey

## Summary

During Phase 2 of the project, the project group solicited feedback from the user community on the Phase 1 curated list of known variations and concerns between Primo BO and Primo VE.

The contribution method chosen was a survey, distributed via the Primo discussion listserv in February and March 2024.

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## Methodology

The community survey consisted of 12 questions::

- **Questions 1 through 7:** Contact details, consent, and system environment information
- **Questions 8 through 10:** 45 items curated by the project group into three categories of higher impact (Q.8 - 8a to 8f), medium impact (Q.9 - 9a to 9o), and lower impact (Q.10 - 10a to 10r), with linked references to an accompanying spreadsheet for further information on each item and a use case document
- **Question 11:** An additional 8 items (11a to 11h) for self-identified consortium members
- **Question 12:** Optional free text comment

See **Appendix A** for the survey and additional documents referenced in the survey.

The survey was preempted with an early notice post to the Primo listserv on January 22 2024, and was then opened for 3 ½ weeks from February 16 2024 through March 11 2024. Reminders were posted on February 27 2024 and March 8 2024.

- January 22 2024: Early notice by email with subject line:
  - *Contribution period soon - Primo BO to VE Feature Alignment Project*
- February 16 2024: Survey open notice by email with subject line:
  - *We need your input! Feature alignment - Back Office to VE; survey due March 11*
- February 27 2024: First survey reminder by email with subject line:
  - *Reminder: We need your input! Feature alignment - Back Office to VE; survey due March 11*
- March 8 2024: Final survey reminder by email with subject line:
  - *Are you on Back Office? Or, do you think VE needs work? Survey ends March 11*

A single response per individual was requested, but multiple submissions from individuals at the same site were welcomed.

Project group members also contacted community members personally per prior direct discussions to encourage contribution, promoted the survey in response to relevant discussion topics on listserv threads during the open period, and shared the survey on additional regional listservs.

See **Appendix B** for copies of the Primo listserv post communications.

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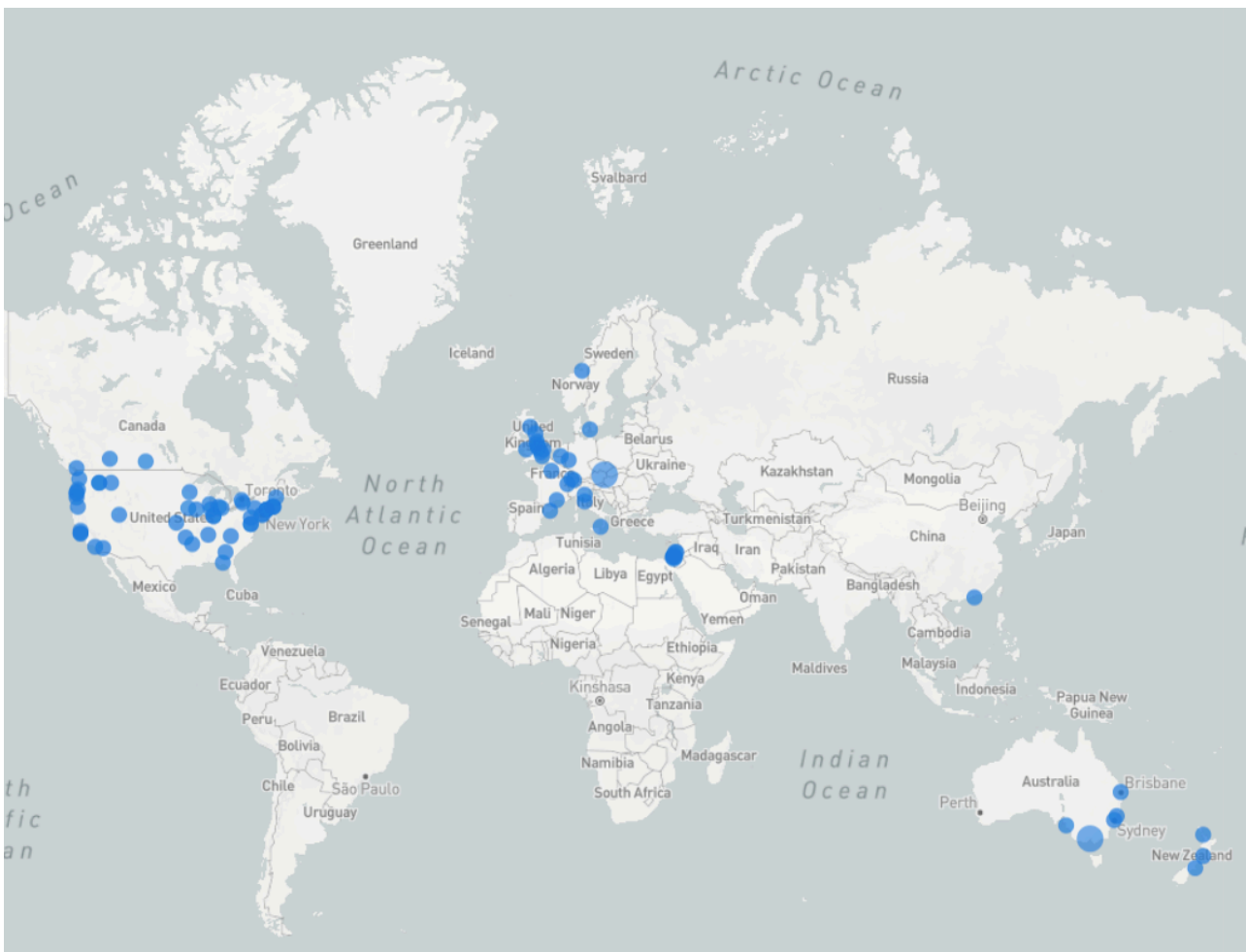
## Survey results

A total of 120 submissions were received, from 105 unique sites. Of the 105 sites, 12 had submitted multiple responses totaling 27 submissions, or an average of just over 2 submissions per institution for those submitting more than 1 response.

Of the 105 unique sites represented in the survey responses:

- 45% self-identified as being part of a consortium
- 77% currently use Primo VE, of which two-thirds have transitioned from Primo BO
- Almost all respondents use Alma

The survey tool captured the IP addresses of respondents and based on this data, responses were received from 16 countries.<sup>1</sup>



World map of survey respondents - Credit: <https://ipinfo.io/tools/map/0159969a-9b4f-43e4-a72d-5c60700f5d4a>

Beyond survey responses, additional contributions were received directly from members of the community. These ranged from a few comments on the curated list items, through to extensive documents with detailed scenarios, use cases, and Support case information.

See **Appendix C** for a compilation of additional submissions.

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<sup>1</sup> It was not verified that the respondent IP matched the geographical location of their institution, but a cursory review of the data suggests that this is true.



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## Survey analysis

### Point values assigned

For the purpose of analysis, the survey item responses in Q.8 (higher impacts), Q.9 (medium impacts), Q.10 (lower impacts), Q.11 (consortium-specific) were assigned a point value.

Points were summed to determine overall level of importance across all 120 responses.

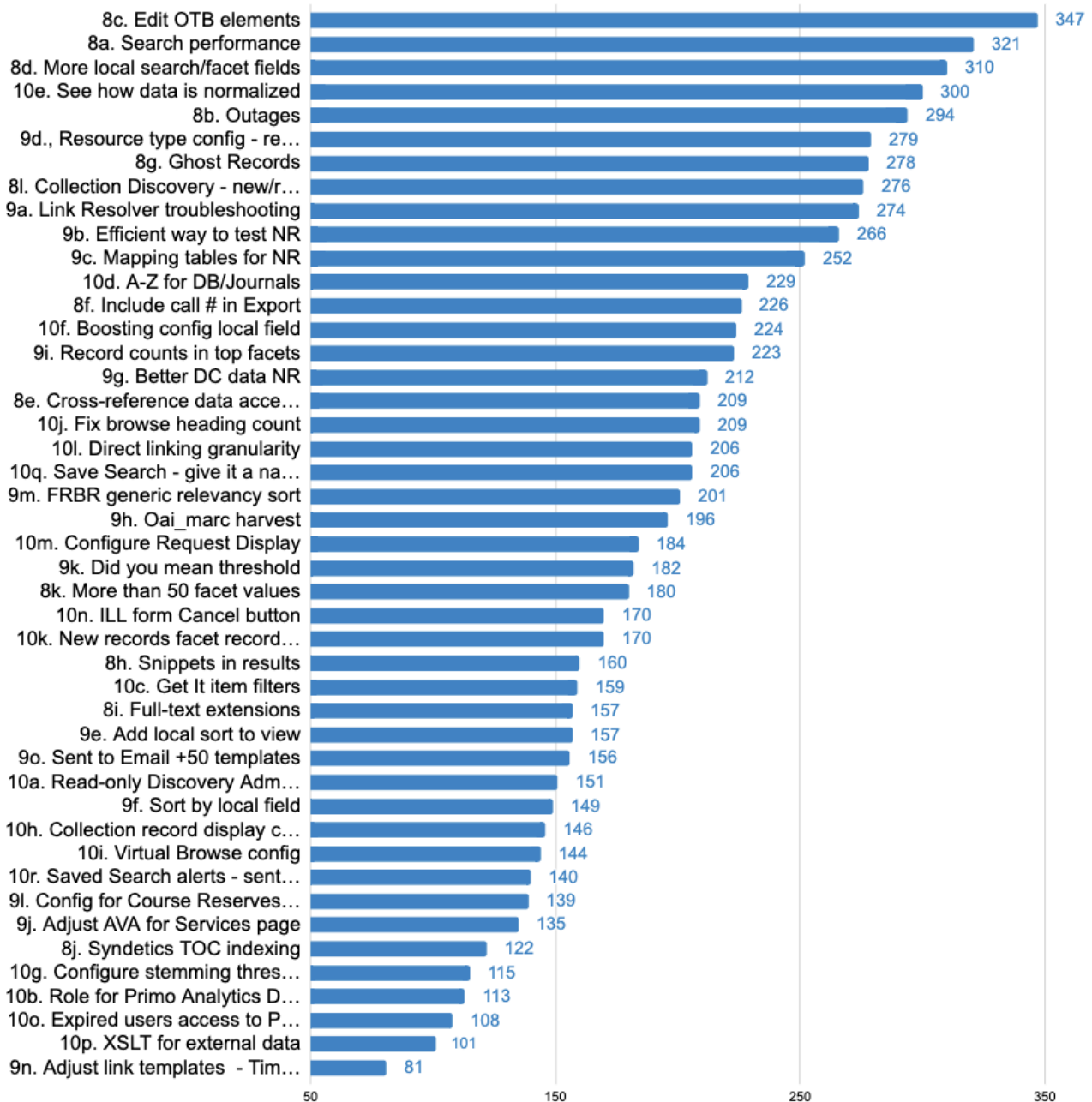
Responses to Q.8, Q.9, Q.10 were analysed together, and responses to Q.11 Consortium-specific items were analysed separately.

Possible responses for each item	Assigned point value for result summary
[No response]	0
NA / Don't know	0
Not at all important	0
Slightly important	1
Moderately important	2
Very important	3
Extremely important	4

See **Appendix A** for the survey and additional documents referenced in the survey.

## Overall raw sum of scores for Q.8, Q.9, Q.10

Chart: sum of scores



### Key finding

Analysis of results revealed an emphasis towards items considered to be standard expectations of a well-functioning system as documented, rather than the key objective of the project to identify feature alignment obstacles.

These infrastructure concerns are highlighted in this report as potential barriers that need to be addressed, but they are not considered to be feature capability requests.

The project group therefore decided to separate these 4 items classified as infrastructure concerns, and omit them from further consideration in the analysis for feature alignment.

## Top ranked infrastructure concerns

- Improve **performance** for search results and facets (speed of UI)
- Alma **outages**, including maintenance windows, should not cause Primo outages
- Exclude "**Ghost Records**" from results
- For **Collection Discovery**, new and removed titles should be automatically reflected in Primo

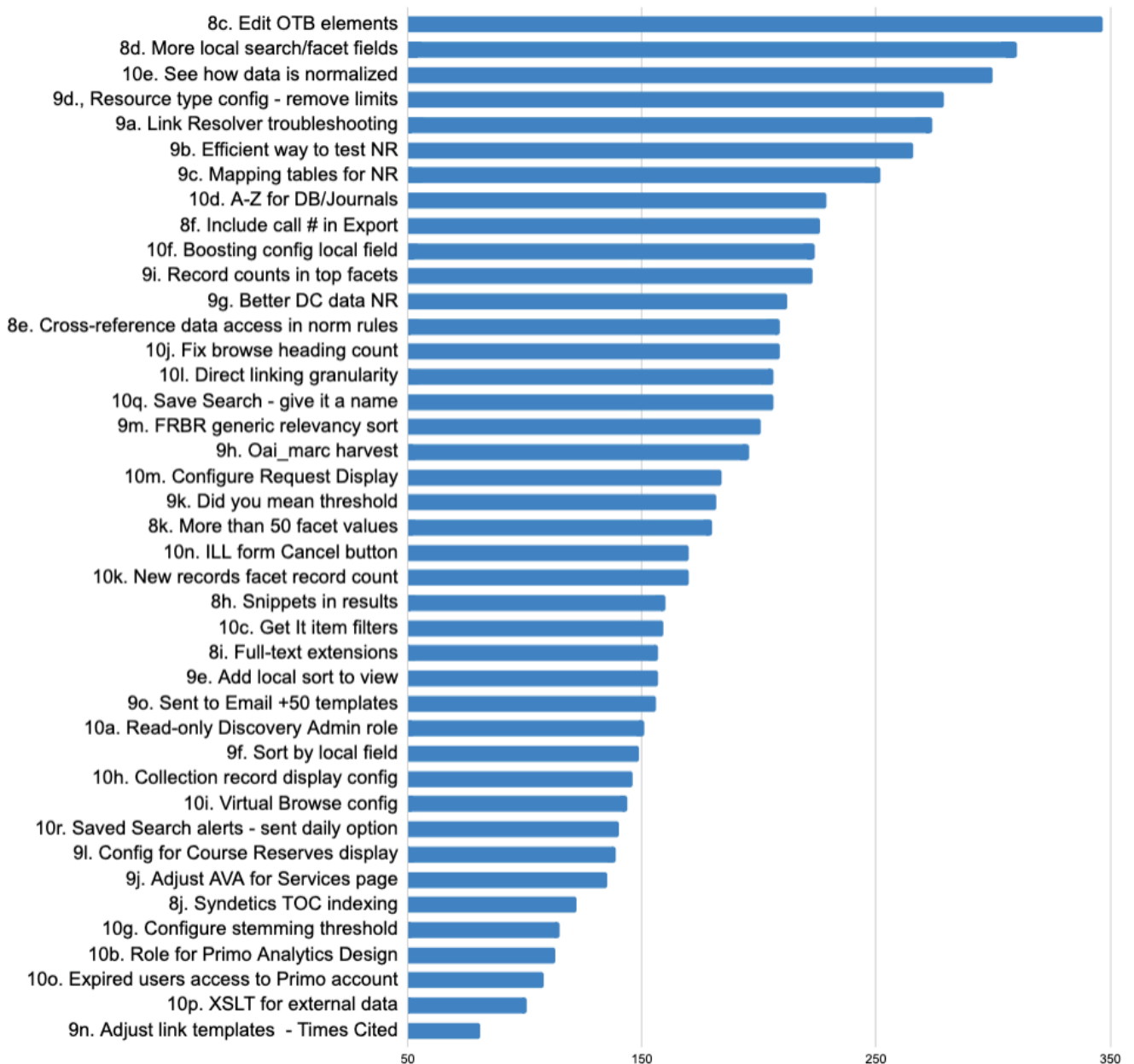
The remainder of the survey analysis to follow does not include these 4 items.

## Top ranked feature capabilities required

After removing these 4 items, there is a new view of top ranked feature capabilities.

### Key finding

A clear 1st ranking was observed for "Edit OTB elements", along with a notable drop in emphasis from the 7th to 8th items.



## Top ranked items, with details from survey attachment

Relative importance	Survey item	Details for survey attachment
1	8c. Ability to edit OTB search, facet, adddata, browse rules. Limited to use cases outlined. <a href="#">See Use Case document.</a>	All PNX elements could be edited in BO.
2	8d. More than 10 Local Fields for search/facet norm rules should be available.	In BO, up to 50 facet and search fields could be configured.
3	10e. Need ability to see how data is normalized for faceting and browsing. Need to see which cross-references are being handled (important for troubleshooting).	In BO this was viewable in the PNX record. In VE, some "PNX elements" can be seen using the &showPnx=true parameter, but others cannot be seen, namely Facets, Links, and Browse
4	9d. For local resource type configuration, up to 5 conditions can be configured per type, but this should be higher. Customers should be able to configure the Database resource type.	BO does not set a limit on the number of conditions that can be used to define a resource type. In VE, there is no option to specify Database type, which can be done in BO.
5	9a. Provide efficient way to troubleshoot Link Resolver problems (BO had fewer steps)	In BO, you can see all the information easily by frame source and adding &displayCTO=true. In VE, there are multiple steps involved to achieve the same result.
6	9b. Provide efficient way to test norm rules (BO stored records so you didn't have to upload every time)	Every time you want to test a rule, you have to upload the record, or copy/paste it. In BO, you could save multiple records in the test tool and use them every time.
7	9c. Ability to create multiple mapping tables for use in normalization rules	BO has powerful functionality to reference source data by normalization rules against custom built mapping tables and normalize accordingly from source data to target data. This has benefits for consistent display in full records, able to be used also for lateral links that bring together all records regardless of source data variation, as well as the same benefits in cohesive facets. It also enables addition of underlying search data to support return of results, such as if source data is a term which a user may not include in their query such as 'BAHons', as this can be mapped to add meaningful terms which a user is more likely to have in their query, such as thesis, honours, bachelor, bachelors. Sites can also collapse into one similar locations for multiple libraries by such mapping tables, such as all 'Stacks' locations grouped together.

## Multiple responses for the same site

As the project group encouraged multiple survey responses per site, rather than only one response per site, additional analysis was done to verify if this factor changed the overall results.

**Method:** This was done by recalculating the survey scores as if only one response had been submitted per site, using the average of the scores for each site. For each the 12 sites for which there were multiple submissions, the responses were averaged together as in the following example:

University A	Question 1	Question 2	Question 3
Submission 1	Very important (3)	N/A / Don't know / No answer	Not at all important (0)
Submission 2	Moderately important (2)	Moderately important (2)	Moderately important (2)
<b>Averaged as:</b>	<b>2.5</b>	<b>2</b>	<b>1</b>

If one respondent answered N/A or did not answer, and the other had a scored response, the scored response was used.

This method of reviewing the results is referred to hereafter as "**1 vote per site**".

**Key finding**

Using these normalized scores, with one averaged response per site, the top 7 ranked feature capabilities *remained the same*.

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**Primo BO site responses, and transitioned to VE site responses**

As a primary objective of the survey and the project work overall was to assess feature alignment concerns for existing Primo BO sites, the project group also conducted further targeted analysis of responses by these sites in comparison to the overall responses and in comparison to responses from sites who have transitioned from Primo BO to Primo VE.

**Method:** First, the scores were calculated as percentages, rather than sums, so that when filtering answers from Primo BO sites, or transitioned sites from Primo BO to Primo VE, the results could be more easily compared. We began with calculating the percentage of points for each item based on all responses from all sites.

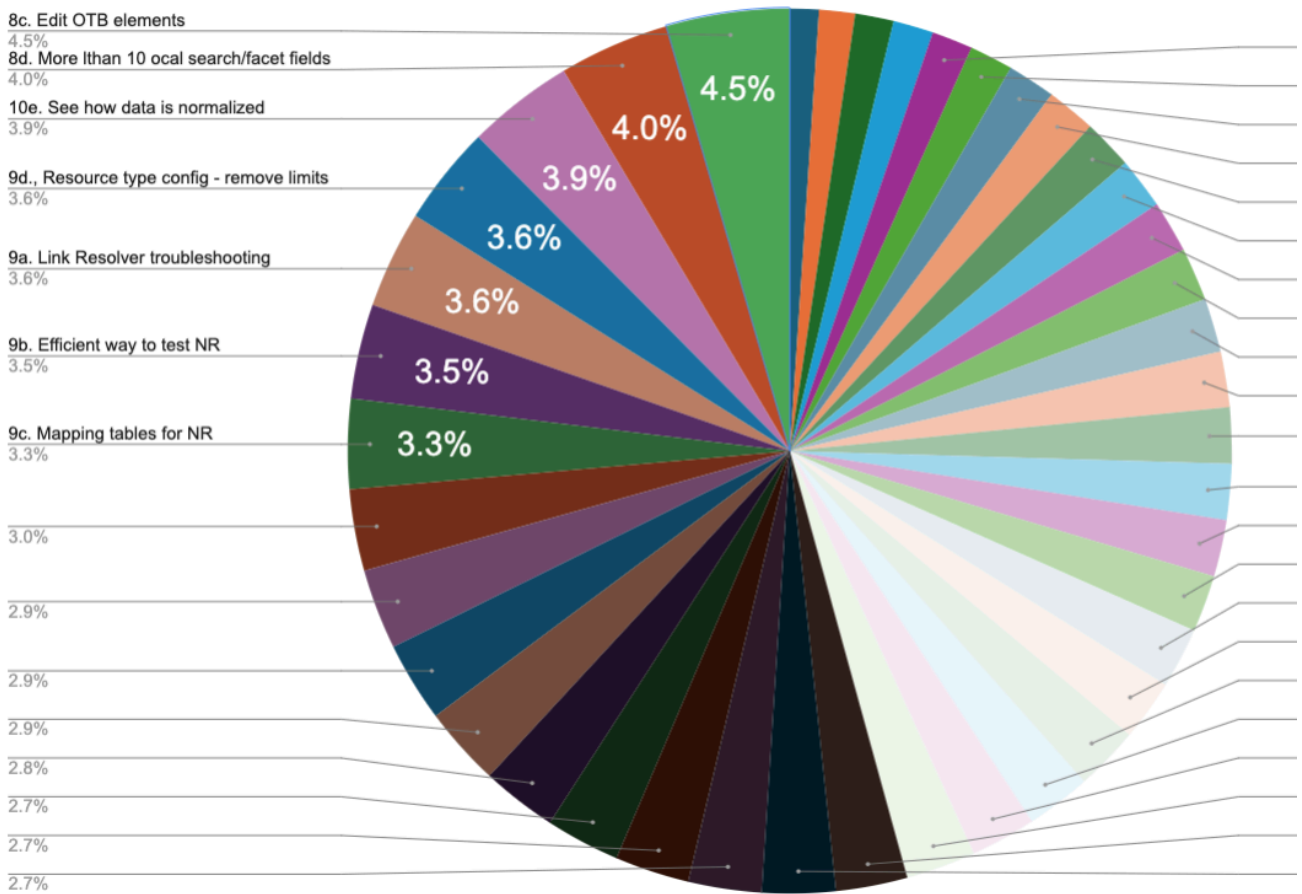
For example, the item "8d. More than 10 Local Fields..." had the following answers when all responses are included:

8d. More than 10 Local Fields...		
Answers (Points)	Count of all responses	Sum of all points
Extremely important (4)	36	144
Very important (3)	38	114
Moderately important (2)	20	40
Slightly important (1)	12	12
Not at all important (0)	7	0

NA / Don't know (0)	4	0
No answer (0)	3	0
Totals	120 responses	310 points

When all items of Q.8 (higher impacts), Q.9 (medium impacts), and Q.10 (lower impacts) were tabulated, the sum of points is 7,688. Therefore, the item "8d. More than 10 Local Fields..." received 4% of the votes (310 points out of 7,688) when all results were calculated. The same percentage is seen if changing the bar chart shown earlier into a pie chart:

### All features, all responses as points, shown as percentage of the whole



With this method, results can be more easily compared when filtered or averaged for multiple responses per site.

The chart below includes the percentages for the top 7 items when using different filters on the responses. Each column header describes the filter used.

These are written in fuller form here:

- All responses (no filter)
- All responses, 1 vote per site (no filter)
- Responses from BO sites
- Responses from BO sites, 1 vote per site
- Responses from migrated sites
- Responses from migrated sites, 1 vote per site

## Results of Primo BO sites and migrated sites as compared to overall responses

This comparison is limited to the top 7 ranked items identified from the overall response, not including the infrastructure/bug issues.

### Key finding

The results were altered slightly with this targeted view, including further variations when scores from multiple sites were averaged together.

Top 7 Items identified earlier	All responses	All responses, 1 vote per site	BO sites	BO sites, 1 vote per site	BO->VE sites	BO->VE sites, 1 vote per site
8c. Ability to edit OTB search, facet, addata, browse rules. Limited to use cases outlined. <a href="#">See Use Case document.</a>	4.5%	4.5%	4.6%	4.6%	4.5%	4.7%
8d. More than 10 Local Fields for search/facet	4.0%	4.0%	4.0%	3.9%	4.4%	4.4%
10e. See how data is normalized, including which cross-references are handled	3.9%	3.9%	4.3%	4.1%	3.9%	4.0%
9d. Resource type configuration	3.6%	3.7%	3.5%	3.5%	3.9%	4.1%
9a. Efficient way to troubleshoot Link Resolver problems	3.6%	3.6%	(not a top priority on BO list)	(not a top priority on BO list)	4.0%	4.1%
9b. Efficient way to test norm rules	3.5%	3.4%	3.6%	3.4%	3.3%	3.3%
9c. Ability to create multiple mapping tables for use in normalization rules	3.3%	3.2%	3.9%	3.8%	3.0% (#10)	3.0% (#10)

### Key finding

Regardless of results from only Primo BO sites, from sites who have transitioned from Primo BO to Primo VE, or from all responses, 6 of the 7 items above are in the top 7 features for all analyses. Several items vary, but those that vary are not in the top 5 of any list.

Items not listed in the table above, but rated in position 6 or lower on various analyses are as follows:

- For BO all responses, there is a tie for 7th position between 8e. Cross-reference data access in norm rules and 9i. Record counts in top facets.
- For BO, when only 1 vote per site is used, there is a tie for 6th place, one of which is the item in the table above, 9b. efficient way to test NR, the other of which is 9i. Record counts in top facets.
- For BO->VE sites, all responses, there is a tie for 6th place, one of which is the item in the table above, 9b. efficient way to test NR, the other of which is 10f. Boosting config local field. There was also a tie for 8th place between 8f. Include call # in Export and 9i. Record counts in

top facets. These are mentioned here because in the table above, 9c. (Mapping tables) in only #10 in this analysis.

- For BO->VE sites, 1 vote per site, #6 is not the table above: 10f. Boosting config local field. Numbers 8 and 9 are: 8f. Include call # in Export and 9i. Record counts in top facets. These are mentioned here because in the table above, 9c. (Mapping tables) in only #10 in this analysis.

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## Analysis discussion

From the survey analysis, the project group determined that the final top feature capability recommendations should be taken from among the top 7 items in the overall list.

Each of these is discussed in the context of potential barriers for Primo BO sites considering transition to Primo VE, and to what extent there may exist reasonable workarounds for these items.

### 8c. Ability to edit OTB search, facet, adddata, browse rules - limited to use cases outlined. [See Use Case document.](#)

**Discussion:** This is clearly the top ranked concern for almost all respondents. There are no identified workarounds for most of the use cases referenced, particularly in the context of the limited number of local fields for search and facet (see 8d).

A close variant of this item ranked 7th in the 2024 NERS Primo enhancements cycle, with the NERS request somewhat narrower in scope than the item in this report, which goes beyond search/facet rules. In the NERS voting, 54 sites committed votes to Request ID #9000 *Edit the out-of-the-box search and facet rules in Primo VE*. Also, as of April 2024, there are 391 votes in the Primo Idea Exchange on the corresponding submission, ranking 7th of all entries in that forum: [Ability to edit the OTB \(Out-of-the-Box\) search and facet rules in Primo VE](#).

We also noted that past Primo development points were expended at a granular field-specific level to meet a very small aspect of this issue: Request ID #6552 *Add 505\$t to Primo VE TOC and Title indexes* (2020). This raises an ongoing concern given the limited number of Primo community development points available each year. The delivery for #6552 also required additional consultation in 2021 between Ex Libris and the IGeLU and ELUNA Primo Working Groups and further development work for adjustment, with negative community feedback. This granularity trend is seen to continue with further top voted Primo Idea Exchange submissions at a field-specific level: 295 votes, ranked 13th as of April 2024: [Primo VE: Ability to search by publisher \(advanced search or facet\)](#).

The alternative to this ongoing work and expenditure of valuable development points at an inconsequential level is to change this fundamental aspect of Primo VE away from Ex Libris complete control and instead towards library empowerment by autonomy to edit these rules.

We also wish to highlight that this area was covered in depth as a Recommendation of the [Primo VE Summit Report](#) (2018) which has not been realised: “*We also recommend allowing for creation of custom entries to static facets, such as the Top-Level Facet*” and “*Enable use of AVA-field equivalent for facet configuration, to achieve parity with Primo. A number of institutions add top-level or other facet values for delineated statuses, more specific than the OTB “available” option (such as “Offsite Copy Available” or “Affiliate Copy Available”)*” (p.20).



While we acknowledge that Primo VE's simplified and streamlined approach to administration has proven successful and appreciated in many areas, there is clearly a strong and unflagging user community demand for a change in development direction for this particular topic of local record management.

**Conclusion:** This is a critical enhancement and is highlighted as a top recommended feature capability item to be addressed.

#### **8d. More than 10 Local Fields for search/facet norm rules should be available.**

**Discussion:** This was also a concern previously in Primo BO. Through the NERS Primo 2015 enhancement cycle and the expenditure of Primo community development points there was expansion to a higher number of local fields: Request ID #4482 *Adding new PNX fields for Search and Display*. It is a significant issue for the potential for expenditure of limited Primo community development points for a second time to achieve the same outcome in Primo VE.

For Primo VE, this request was ranked highly in 10th position in the NERS 2023 Primo Enhancements cycle by Request ID #8130 *Increase number, normalization, and indexing options for local fields (VE)*, with 52 sites committing votes. The request was rejected from pointing by Ex Libris with the statement: *"We will add this request to the roadmap in a way that we will examine each use case coming from the community and think together how to solve it in the best way for Primo VE customers."*

We also note that this item was a Recommendation of the [Primo VE Summit Report](#) (2018) which has not been realised: *"Increase the number of local fields to 200 (or make it an option per customers) so that libraries can accommodate external data sources that need dedicated fields"* (p.16).

**Conclusion:** Remaining Primo BO sites make heavy use of this feature and it is considered a critical enhancement for Primo VE. This item is highlighted as a top recommended feature capability item to be addressed.

#### **10e. Need ability to see how data is normalized for faceting and browsing. Need to see which cross-references are being handled (important for troubleshooting).**

**Discussion:** While this item is ranked highly in the survey results, the infrastructure of Primo VE is such that changes are indexed in the discovery environment within up to 15 minutes. This may serve as a reasonable workaround for not being able to see the full "PNX" equivalent in Primo VE. For example, to verify how a subfield is handled, the subfield may be added to a record, and then almost immediately observed in display, faceting, searching etc.

However, it is also noted that this is an ongoing item of interest for the user community as a Recommendation of the [Primo VE Summit Report](#) (2018) which has not been realised: *"Ensure that library staff can troubleshoot problems for individual search results by viewing all elements via showPnx=true not only in display, but in browsing, linking, faceting, dedup, and FRBR, to achieve true parity with Primo"* (p.12).

**Conclusion:** While it is acknowledged that this is different and less efficient, it is not considered a barrier to transition from Primo BO to Primo VE.

#### **9d. For local resource type configuration, up to 5 conditions can be configured per type, but this should be higher. Customers should be able to configure the Database resource type.**

**Discussion:** These limitations, particularly the inability to configure the Database type, are a

barrier to sites who have made use of the Primo BO flexibility for resource type handling. For some Primo BO sites who have implemented custom resource types, or highly modified the out-of-the-box (OTB) resource types to support local special collections, this may be a significant barrier to transitioning to Primo VE.

This area of configuration has been raised previously by the Primo user community, with the current stage of Primo VE development due to the NERS 2022 Primo Enhancements cycle, through Request ID #7790 *Requesting Flexibility in Local Resource Type Configuration (VE)*. This received strong community support with 78 sites voting in the first ballot and 82 in the second, ranking 6th in both. Delivery also required iterative work to meet expectations of the detailed request specifications for granular configuration control in this area, in consultation between Ex Libris and the IGeLU and ELUNA Primo Working Groups.

**Conclusion:** This item is highlighted as a top recommended feature capability item to be addressed.

#### **9a. Provide efficient way to troubleshoot Link Resolver problems (BO had fewer steps)**

**Discussion:** While it is unfortunate that Primo VE does not offer a more efficient and less time-consuming method for link resolver troubleshooting, there is an available workaround and it is not considered a barrier to transition to Primo VE.

**Conclusion:** The community should pursue this item through enhancement avenues of NERS cycles and/or Ideas Exchange.

#### **9b. Provide efficient way to test norm rules (BO stored records so you didn't have to upload every time)**

**Discussion:** Testing normalization rules for external sources is extremely onerous in Primo VE. Some fairly straightforward user interface improvements, such as sticky selections, could make this process significantly less painful for staff configuring Primo VE. While frustrating, this is not considered a significant barrier for Primo BO sites to transition to Primo VE.

**Conclusion:** The community should pursue this item through enhancement avenues of NERS cycles and/or Ideas Exchange.

#### **9c. Ability to create multiple mapping tables for use in normalization rules**

**Discussion:** This is a very useful feature of Primo BO, and currently only a portion of the functionality is possible in Primo VE. In Primo VE, it is possible to create extremely large normalization rules to effectively achieve a portion of the same transformations. There is also a singular transformations mapping table available.

**Conclusion:** The Primo BO configuration capabilities are considerably easier and quicker to build and maintain, with also significantly less likelihood of errors which would negatively impact on discovery. It is noted that this may not be a barrier for some sites not using this option currently on Primo BO, or if replication normalization workarounds have been already developed by Primo VE sites. This item is highlighted as a top recommended feature capability item to be addressed.

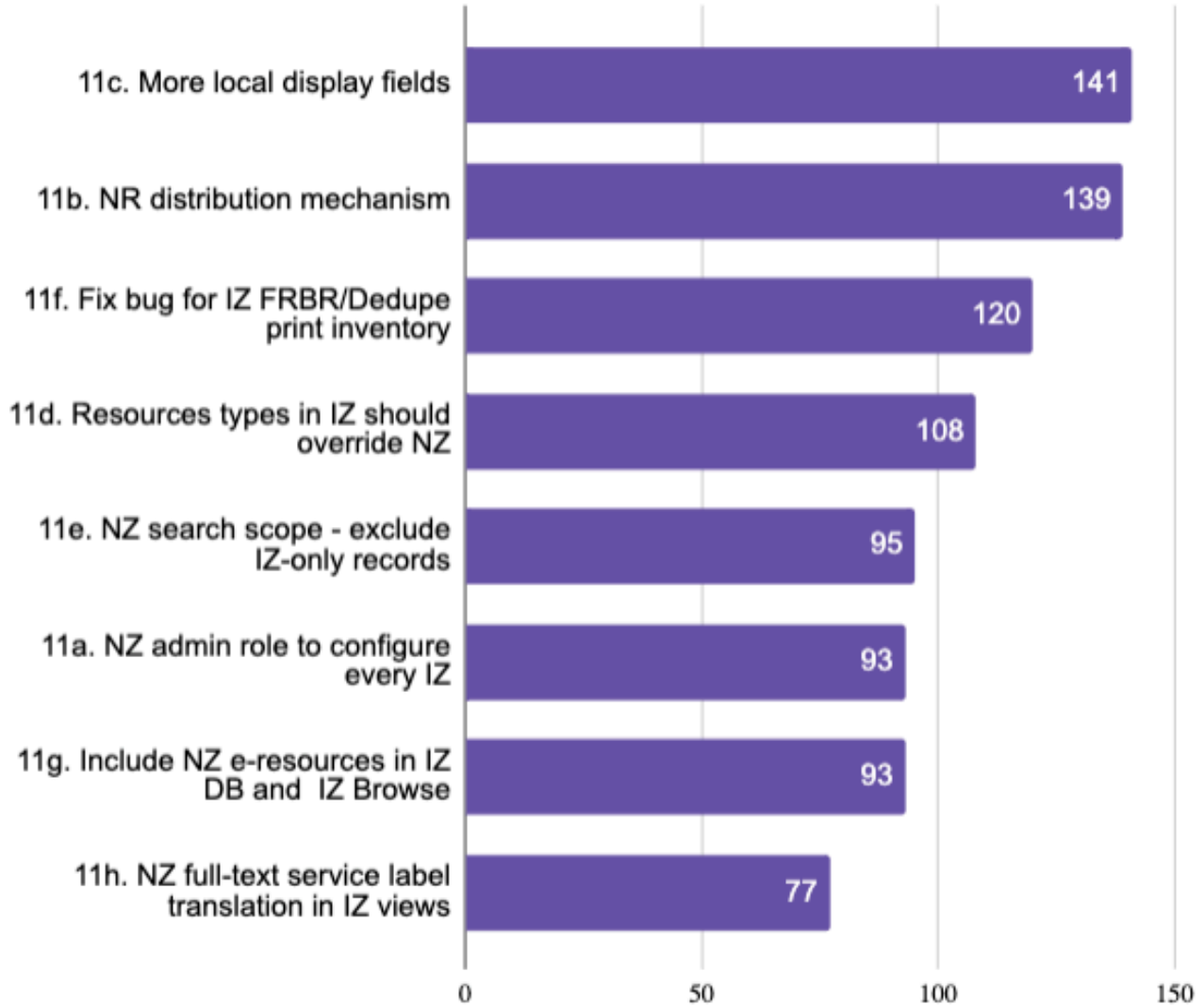
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## Consortium-specific

With the particular needs of consortia, the project group decided to add a targeted section to the survey to address consortium-specific concerns.

The consortium-specific items were shown in the survey by self-identification as a consortium at Q4. with then presentation of 8 items for response at Q.11.

### Overall raw sum of scores for Q.11



**Consortium-specific items in ranked order based on all results, with details from survey attachment:**

<b>Sum of scores</b>	<b>Consortium survey item</b>	<b>Consortium details for survey attachment</b>
141	11c. Need more local display fields (in BO each IZ had 200).	Local display fields must be shared among entire NZ, whereas in BO each institution had 200 local fields
139	11b. Need a distribution mechanism for normalization rules so that each IZ doesn't have to copy/paste them separately.	Every IZ must manually configure (copy/paste) each individual rule for each field (with the exception of External Resources). In BO, NZ can define NR templates and IZ can easily copy them with a single click.
120	11f. Fix bug: when an IZ enables FRBR/Dedupe, the print inventory of all the other IZ in the NZ is hidden when there is electronic inventory too.	In a consortial Alma setup with a Network Zone and with Primo VE, our consortia has noticed that if an Institution Zone (IZ) has enabled dedupe/frbr in a Primo View and there is print and electronic inventory for a title, the print inventory of other IZ's is completely hidden and only the electronic displays. Desired behavior: When dedupe/frbr is enabled, display both physical and electronic inventory. Do not hide the print inventory of other IZ's in favor of electronic inventory.
108	11d. Resource types in IZ should overwrite those set in NZ.	
95	11e. NZ search scope should exclude IZ-only records.	In consortial environments, the Network Scope includes Institution Zone only records such as laptops, keys, etc. We would like the capability to exclude IZ only records from a Discovery Network scope so that we can display only records that are NZ bibs, not local IZ with no NZ bibs.
93	11a. Need admin role that can adjust configuration for each IZ without requiring a separate login for each IZ.	NZ staff role cannot configure at the IZ level. They need to login to each individual IZ to make changes. Whereas in BO, a superuser could configure at the installation level and institution level with single login.
93	11g. IZ Database and IZ Browse should include e-resources managed at NZ level.	For consortia with Network Zones, the centralized management of electronic resources is an integral function of the NZ. However, the Alma Browse Bibliographic Headings functionality used for the Primo VE Browse Search indexes omits e-resources available to an institution via the NZ.
77	11h. NZ full-text service labels need to be translated in IZ views	PrimoVEs in our network use 4 languages for the user interface - English, German, French and Italian. Consortial and Open Access e-resources are activated in the Network Zone for all the IZs. When viewing Full-text services from NZ in the detailed view in IZs, the coverage and license labels are not translated to the language of the user UI. The absence of translation creates discrepancy for our users. The IZ FT services' labels are translated but the NZ services are always in English.

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## Multiple responses for the same site and Primo BO site responses

When all responses were normalized by the “1 vote per site” method, the top 4 ranked items for consortium-specific features remain the same. When considering specifically responses from transitioned sites, the top 4 are also the same items in the same order.

However, when considering only Primo BO sites (all responses), multiple items change order:

1. 11b. NR distribution mechanism (*also in top 4 overall*)
2. 11f. Fix bug: when an IZ enables FRBR/Dedupe.... (*also in top 4 overall*)
3. 11c. More local display fields (*also in top 4 overall*)
4. **11a. NZ admin role to configure every IZ (NEW)**

For Primo BO sites, when using the “1 vote per site” method, the top 4 are the same as above, except that 2 and 3 are reversed.

Many of the consortia items are rated very close to each other making it difficult to determine which should be recommended for development with the aim of removing barriers for existing Primo BO sites.

For this reason, we also analysed relative scores as percentages.

## Relative percentages of scores

Consortia items	All responses	All responses, 1 vote per site	BO sites	BO sites, 1 vote per site	BO->VE sites	BO->VE sites, 1 vote per site
11c. Need more local display fields (in BO each IZ had 200).	16.3%	16.5%	14.4%	15.7%	16.8%	17.3%
11b. Need a distribution mechanism for normalization rules so that each IZ doesn't have to copy/paste them separately.	16.1%	16.2%	18.1%	18.5%	14.5%	14.9%
11f. Fix bug: when an IZ enables FRBR/Dedupe, the print inventory of all the other IZ in the NZ is hidden when there is electronic inventory too.	13.9%	13.4%	15.5%	14.5%	14.0%	13.6%
11d. Resource types in IZ should overwrite those set in NZ.	12.5%	11.9%	11.8%	10.1%	12.8%	12.5%
11e. NZ search scope should exclude IZ-only records.	11.0%	10.7%	11.4%	10.6%	10.8%	11.2%
11a. Need admin role that can adjust configuration for each IZ without requiring a separate login for each IZ.	10.7%	10.7%	14.0%	12.7%	10.0%	10.2%
11g. IZ Database and IZ Browse should include e-resources managed at NZ level.	10.7%	11.5%	5.9%	7.8%	11.7%	11.5%
11h. NZ full-text service labels need to be translated in IZ views	8.9%	9.2%	8.9%	10.1%	9.4%	8.8%

## Key finding

When looking at the results as percentages, we can see that for existing Primo BO sites, item 11a. "NZ admin role to configure every IZ" is almost as important as the other top-rated features. It is more relatively important to BO sites, than 11d. "Resources types in IZ..." is to the overall responses and migrated sites.

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## Analysis discussion

As one of the goals of this project is to remove barriers to Primo BO sites transitioning to Primo VE, it is important that the responses from these sites be given higher priority. The outcome is a shift to top ranking of 11a. "NZ admin role to configure every IZ."

Bearing this in mind, on balance of scores and project focus, the project group determined to highlight the following items as top feature capabilities required and infrastructure concerns for consortium environments:

- Need more local display fields (in BO each IZ had 200)
- Need a distribution mechanism for normalization rules so that each IZ doesn't have to copy/paste them separately
- Need admin role that can adjust configuration for each IZ without requiring a separate login for each IZ.
- Fix bug: when an IZ enables FRBR/Dedupe, the print inventory of all the other IZ in the NZ is hidden when there is electronic inventory too

It remains notable that the results for the consortium-specific items have a broader degree of variation, making the outcome somewhat less certain than the overall broader survey questions.

To aid in the picture of current consortium-specific community interest, the following top ranked Primo Idea Exchange submissions are noted, as of April 2024:

- 419 votes ranked 5th: [Primo VE: Allow Exclusion of Institution Zone only records from Discovery Network/NZ Scope](#)
- 259 votes ranked 18th: [In Primo VE and in consortial Alma setup, display print and electronic inventory even if dedupe/frbr is enabled](#)

There are no highly ranked NERS enhancements submissions aligned to survey items in the NERS 2024 and 2023 Primo enhancement cycles.

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# Roadmap item

The project group would like to flag the following item on the [Primo VE 2024 Roadmap](#) (PDF).

## **“Allow CDI Records and External Resources in Alma Collections**

*What’s New? Expand Collection Discovery beyond Alma bib records.*

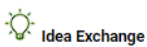
*Highlights: Allow Collection Manager to add specific selected CDI or external records to be displayed as part of the Collection Discovery.*

*Patron will explore collections that will contain both local and external resources.*

*Impact: Better manage and expose what is most relevant.”*

Related Idea Exchange submission: [Allow CDI records and external resources to be added to Alma collections for Primo Collection Discovery](#)

## Allow CDI Records and External Resources in Alma Collections



What’s New?	Highlights	Impact
Expand Collection Discovery beyond Alma bib records.	<ul style="list-style-type: none"><li>• Allow Collection Manager to add specific selected CDI or external records to be displayed as part of the Collection Discovery.</li><li>• Patron will explore collections that will contain both local and external resources.</li></ul>	Better manage and expose what is most relevant.

This feature is emphasised as it was not included in the community survey in February - March 2024 on the basis of the Primo VE 2024 Roadmap stating delivery of this item in the second half of 2024.

The feature capability described for Central Discovery Index (CDI) records is not possible currently for either Primo BO or Primo VE sites.

However the Primo Back Office environment supports the ability to enrich Collection Discovery collections with local external records beyond Alma, such as from Institutional Repositories and Archival Management Systems, whereas Primo VE currently does not.

The expectation is that the Roadmap item will be delivered in a manner which ensures continuity of feature capabilities for this item, as a current hindrance for Primo BO sites to transition to Primo VE.

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# Recommendations

The work of this project has required careful consideration of final recommendations, balancing throughout the desire to give voice and recognition to the contributions of all members of the Primo community, while also working within the targeted framework of the key objectives, being:

1. Identify primary obstacles hindering Primo Back Office sites from transitioning to Primo VE
2. Identify primary challenges encountered by sites already using Primo VE
3. Present a prioritized list of development items to Ex Libris Primo Product Management

The project group also aimed towards the strategic goal to fully seize this opportunity for greatly enhanced Primo VE feature capabilities, as specifically by project name of “Feature Alignment”. To this end, there was a deliberate avoidance of items which are reasonably possible to configure but by different mechanism, or to implement by customization package.

This approach also significantly reduced the number of items included where were deemed as unexpected behaviours or defects. It was an interesting outcome of the survey that the results rated quite highly several infrastructure concerns around performance, indexing, and system availability. The project group therefore has included these items in the recommendations while also noting that these are standard expectations of a well-functioning system, as opposed to features.

Bearing the above in mind, the project group presents the following final recommendations:

## Top feature capabilities required

With focus on significant potential barriers for Primo BO sites to transition to Primo VE, the following feature enhancements are recommended for development:

Rank	Item	Summary
1	Ability to edit <b>OTB search, facet, adddata, browse rules</b> . Limited to use cases outlined. <a href="#">See Use Case document</a> .	All PNX elements could be edited in the Primo Back Office. Existing BO sites make heavy use of this capability and this is a barrier to transition to VE. See also related 2024 NERS requests in top 20 after round 1: 8756 (facet for physical availability), 9000 (edit OTB search and facet rules).
2	More than 10 <b>Local Fields</b> for search/facet norm rules should be available	In BO, up to 50 facet and search fields could be configured. Existing BO sites make heavy use of this capability and this is a barrier to transition to VE. See also similar request from NERS 2023, request 8130 “Increase number, normalization, and indexing options for local fields (VE).” The request was rejected after 1st round with this comment from Ex Libris, “We will add this request to the roadmap in a way that we will examine each use case coming from the community and think together how to solve it in the best way for Primo VE customers.”



3	For <b>local resource type configuration</b> , up to 5 conditions can be configured per type, but this should be higher. Customers should be able to configure the <b>Database</b> resource type	BO does not set a limit on the number of conditions that can be used to define a resource type. In Primo VE, there is no option to specify Database type, which can be done in the Primo Back Office. BO sites have implemented custom resource types, or highly modified the out-of-the-box (OTB) resource types to support local special collections, this may be a significant barrier to transitioning to VE.
4	Ability to create multiple <b>mapping tables</b> for use in normalization rules	BO has powerful functionality to reference source data by normalization rules against custom built mapping tables and normalize accordingly from source data to target data. This has benefits for consistent display in full records, able to be used also for lateral links that bring together all records regardless of source data variation, as well as the same benefits in cohesive facets. It also enables addition of underlying search data to support return of results, such as if source data is a term which a user may not include in their query such as 'BAHons', as this can be mapped to add meaningful terms which a user is more likely to have in their query, such as thesis, honours, bachelor, bachelors. Sites can also collapse into one similar locations for multiple libraries by such mapping tables, such as all 'Stacks' locations grouped together.

## Important infrastructure concerns

With focus on significant potential barriers for Primo BO sites to transition to Primo VE, the following infrastructure concerns are highlighted to address:

Rank	Item	Summary
1	<b>Performance</b>	Improve performance for search results and facets (speed of UI). This is a significant issue for degradation of overall service for patrons, in transition from BO to VE.
2	<b>Outages</b>	Alma outages, including maintenance windows, should not cause Primo outages. For Primo Back Office maintenance windows, one front-end server was generally still available. In the Back Office environment, even if there was an Alma outage, or a problem with the index of local records, Central Discovery Index (CDI) results continued to be available.
3	<b>Ghost Records</b>	Exclude "Ghost Records" from results. Currently they are not deleted until after a patron sees them in their results. The presentation of these records degrades customer confidence in the system.
4	<b>Collection Discovery updates</b>	When creating or updating an Alma collection (adding/removing titles), the change is not automatically reflected in the Discovery Collections and it is necessary to trigger the reindexing for a correct display. For VE customers who have never been on BO, this was the #2 issue reported via the survey.

## Consortium-specific items

With focus on significant potential barriers for Primo BO sites to transition to Primo VE, the following consortium-specific items are emphasised:

Rank	Item	Summary
1	Need <b>more local display fields</b> (in BO each IZ had 200)	Local display fields must be shared among entire NZ, whereas in BO each institution had 200 local fields
2	Need a <b>distribution mechanism</b> for normalization rules so that each IZ doesn't have to copy/paste them separately	Every IZ must manually configure (copy/paste) each individual rule for each field (with the exception of External Resources). In BO, NZ can define NR templates and IZ can easily copy them with a single click.
3	Need <b>admin role</b> that can adjust configuration for each IZ without requiring a separate login for each IZ	NZ staff role cannot configure at the IZ level. They need to login to each individual IZ to make changes. Whereas in BO, a superuser could configure at the installation level and institution level with single login.
4	Fix bug: when an IZ enables <b>FRBR/Dedupe</b> , the print inventory of all the other IZ in the NZ is hidden when there is electronic inventory too	In a consortial Alma setup with a Network Zone and with Primo VE, our consortia has noticed that if an Institution Zone (IZ) has enabled dedupe/frbr in a Primo View and there is print and electronic inventory for a title, the print inventory of other IZ's is completely hidden and only the electronic displays. Desired behavior: When dedupe/frbr is enabled, display both physical and electronic inventory. Do not hide the print inventory of other IZ's in favor of electronic inventory.

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## Recognition and thanks

The project group extends thanks to all the members of the Primo community who actively contributed to the work of this project, supporting further Primo VE development for the benefit of all Primo customers.

The support of the ELUNA Steering Committee and the IGeLU Steering Committee is appreciated, particularly the respective Liaisons to the ELUNA Primo Working Group and the IGeLU Primo Working Group.

We look forward to continuing collaborative discussions with Ex Libris Primo Product Management and ongoing Primo VE product development, in actioning the recommendations of this report.

# Appendices

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## Appendix A

### Survey and referenced documents in the survey

- Survey - [File](#)
- Use cases - [File](#)
- Spreadsheet - [File](#)

*Note: The details in the Use cases and Spreadsheet files have been refined post-survey for clarity and meaning to support product development, with also minor typo corrections*

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## Appendix B

Primo listserv communications - [Folder](#)

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## Appendix C

Compilation of Q.12 Free text responses and additional submissions - [File](#)

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