The journey to Primo VE:

Navigating challenges and exploring ~~hidden treasures~~ Pandora's box

Stacey van Groll

Manager, Discovery and Access
Library Technology Service
The University of Queensland

and

IGeLU Primo Working Group Coordinator
Co-Lead - Primo BO to VE Feature Alignment Project

IGeLU Conference 2024

Summary

Primo BO to VE Feature Alignment Project

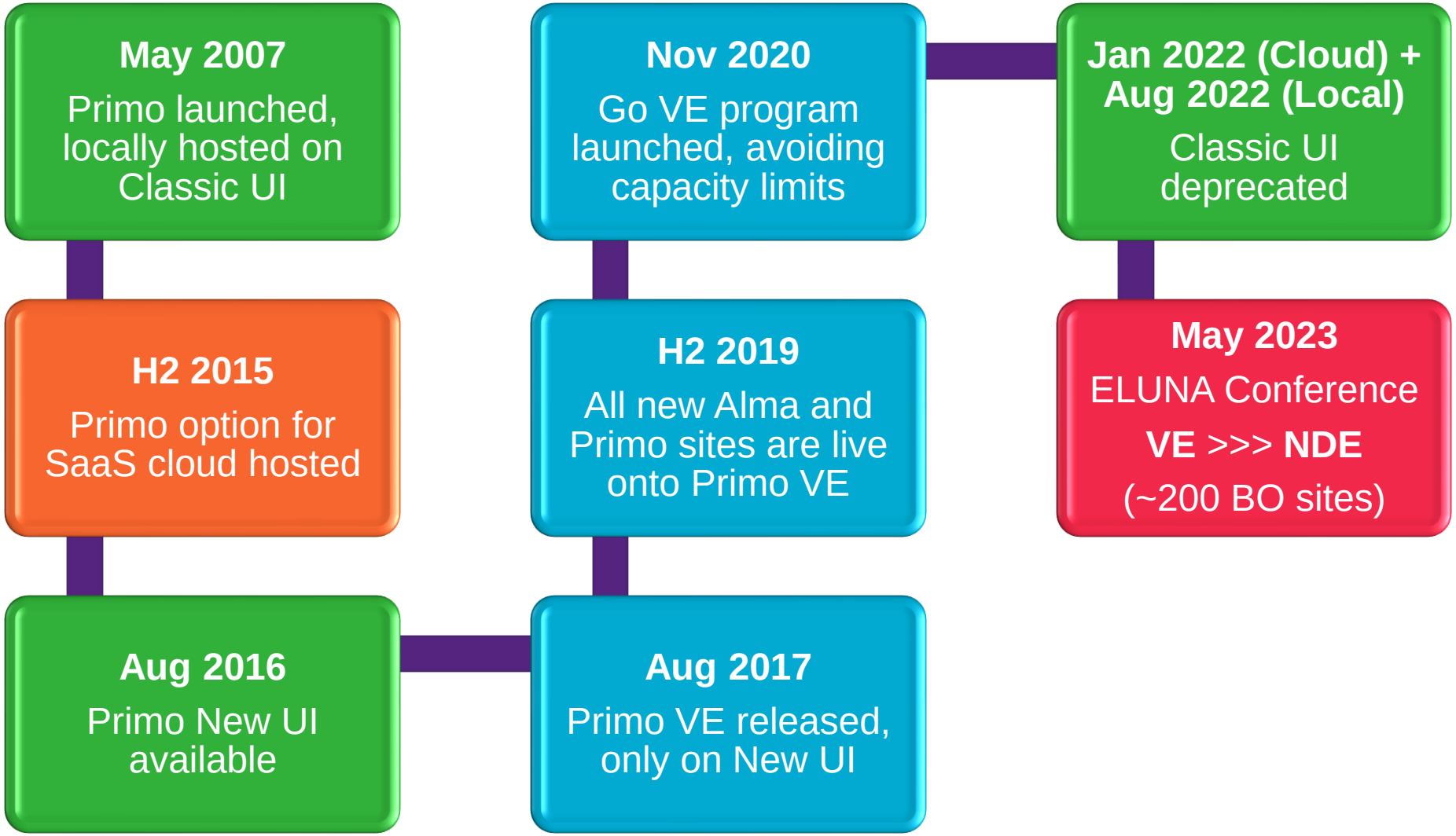
Genesis – Goals – Timeline – Project members – Links

Stages

1. Gathering + Curating > Survey
2. Analysing + Deciding > Report
3. Summaries: Priority development items
4. Next Steps + Updates thus far

Questions?

Genesis (*and a recap on Primo development*)



Primo WG/s project agreed, with **goals**:

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

"Feature alignment" *not* "Configuration parity"

Project timeline overview

May 2023 Discussions at ELUNA Conference

Phase 1 - Internal

Jun > Aug 2023 – IGeLU and ELUNA WG group formation. Solo work logging entries into a template spreadsheet

Sep 2023 – Checkin with IGeLU Primo WG members and ELUNA Primo WG Co-Lead at the IGeLU Conference

Oct + Nov 2023 – Official Kick-off meeting held. All project group now working on logging to the spreadsheet. Requested Ex Libris point person for Q&A > Denied

Dec 2023 – Reviewing and categorising entries. Flagged several likely prioritised items with Ex Libris

Phase 2 - External

January 2024 – Finalising internal work, and preparing for external community input via a survey

February 2024 – Survey opened 16 February

March 2024 – Survey closed 11 March, and working on analysing results

April 2024 – Finalising analysis, recommendation decisions, and report writing. Report submission 30 April

Project members

- **About us – by organisation**
  - 5 x IGeLU (International Group of Ex Libris Users)
  - 3 x ELUNA (Ex Libris User Group of North America)
- **About us – by experience**
  - 8 x All have worked extensively with BO
  - 4 x VE now, transitioned from BO
  - 4 x BO now, with 2 in “Go VE” Enablement
  - Also, 3 x Consortium experience

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

Key links

- **Report – Primo BO to VE Feature Alignment Project** - April
  - Includes appendix links to the survey, use cases, spreadsheet, listserv comms, and additional file of free text responses and submissions

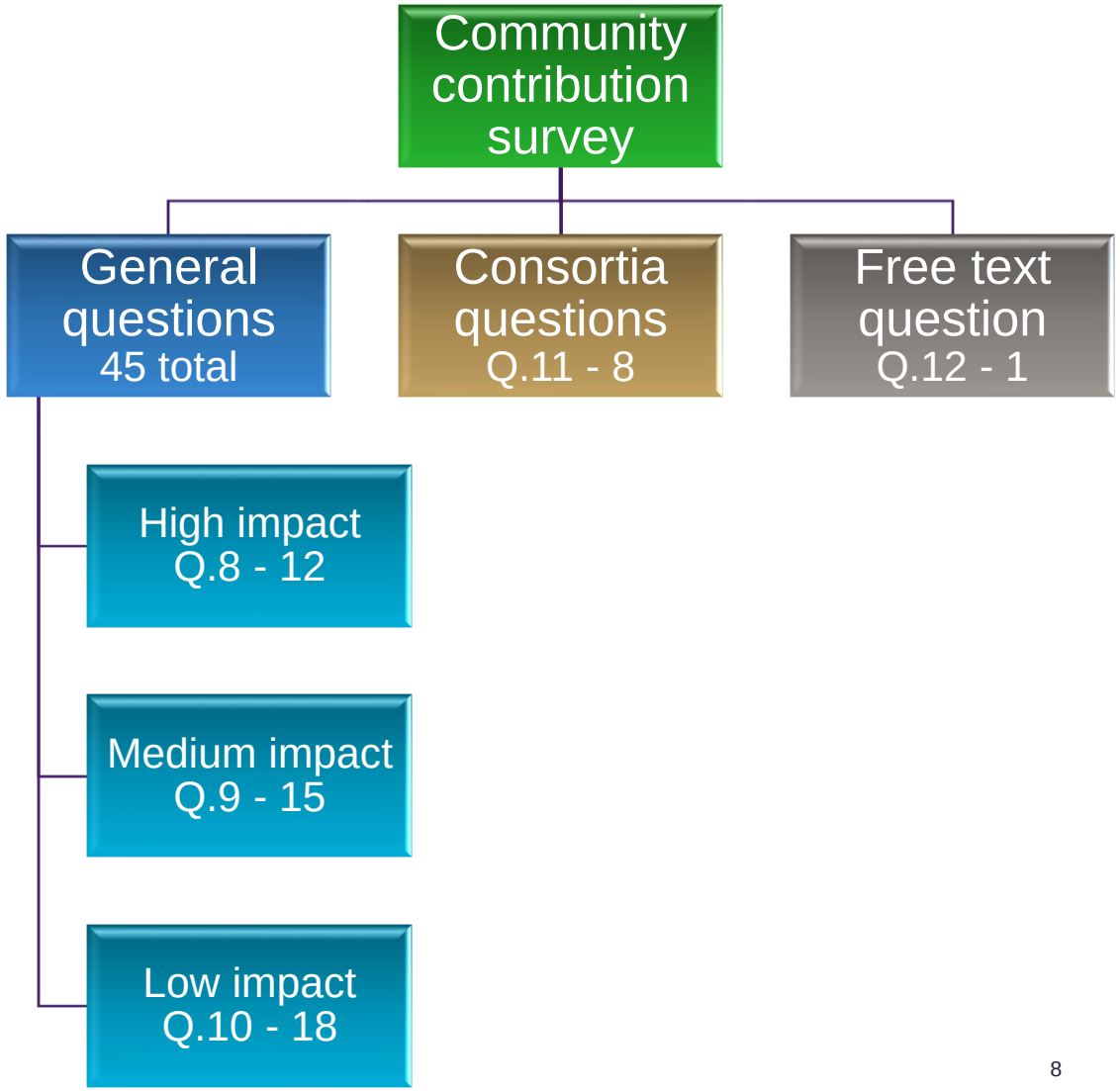
- **ELUNA Annual Meeting** (pptx) - May
  - Presentation by ELUNA Primo WG Co-Lead: Corinna Baksik

- **ANZREG Conference** (recording) - June
  - Presentation by IGeLU Primo WG Co-Lead: Stacey van Groll

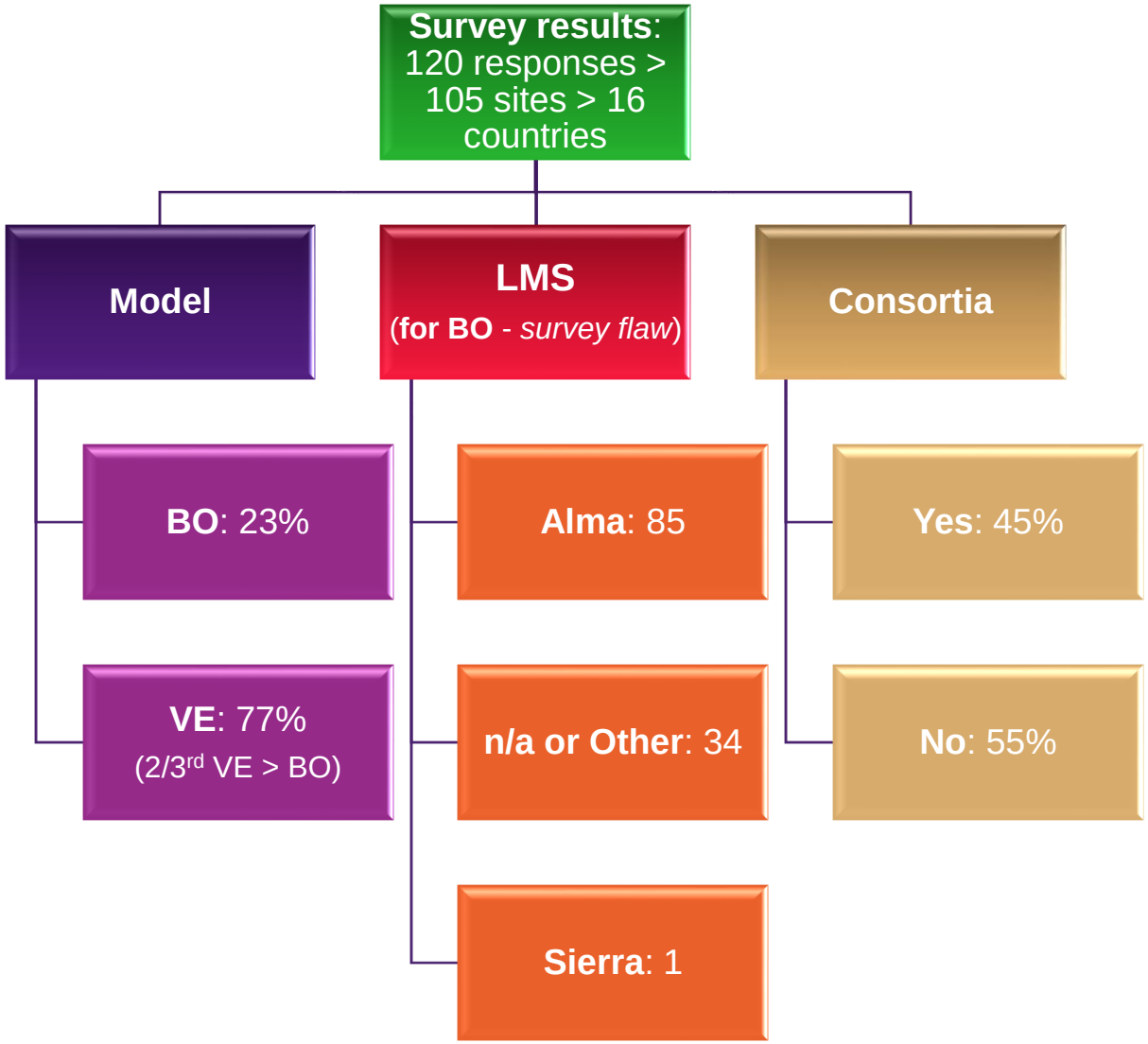
Gathering + Curating > Survey

Internal work on variations log

- **Gathering**: Spreadsheet of more than 85 rows
  - Still *not* exhaustive
- **Curating** into areas: Norm rules, admin, config, UI, etc
- **Survey** development, splitting out aspects like:
  - move to use cases document
  - transition issue only
  - possibility of customisation
  - *reasonable* workaround by normalisation or configuration
  - already developed, with ongoing releases



Analysing + Deciding > Report



Analysis work on external input complexities

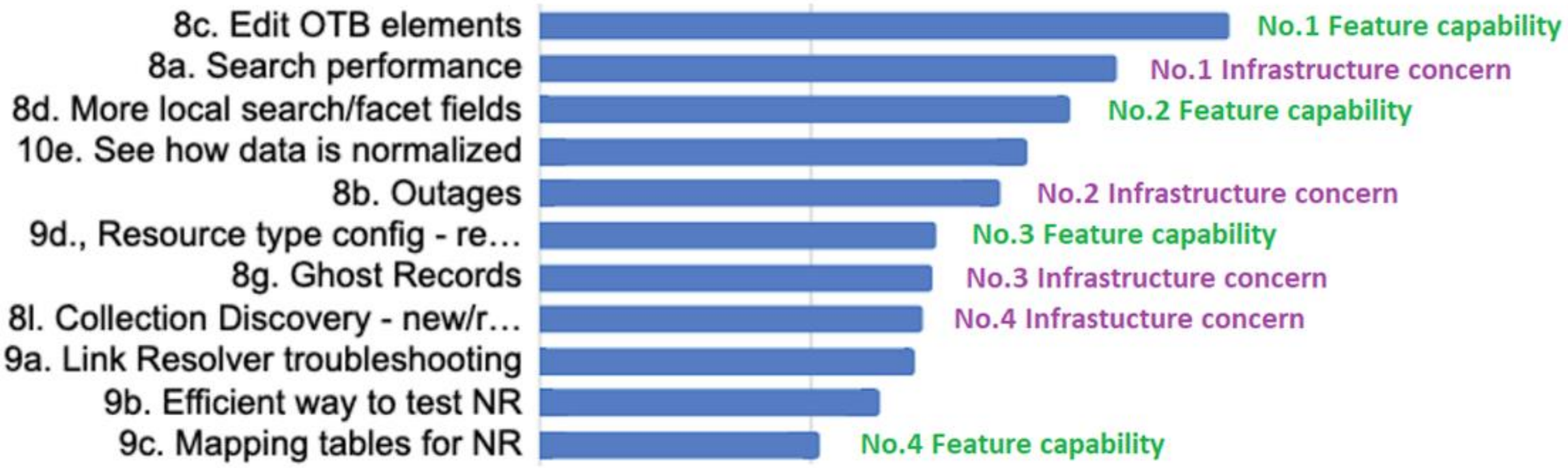
- Interesting results emphasis on what was decided to call **Infrastructure concerns** versus the key project goal of **Feature capabilities** > split recommendations into two, in order to acknowledge and incorporate the importance of both
- **Multiple submissions** by the same site > this was welcomed in the survey, but still needed to be considered to avoid bias
- Priority consideration for responses by **current BO sites** in keeping with key project goal > results mostly still in alignment

Also

- **Collection Discovery for external source records** was not included in the survey as on the 2024 Roadmap for H2. Belated **RED FLAG** as it was also on the 2023 Roadmap for H2, but not delivered

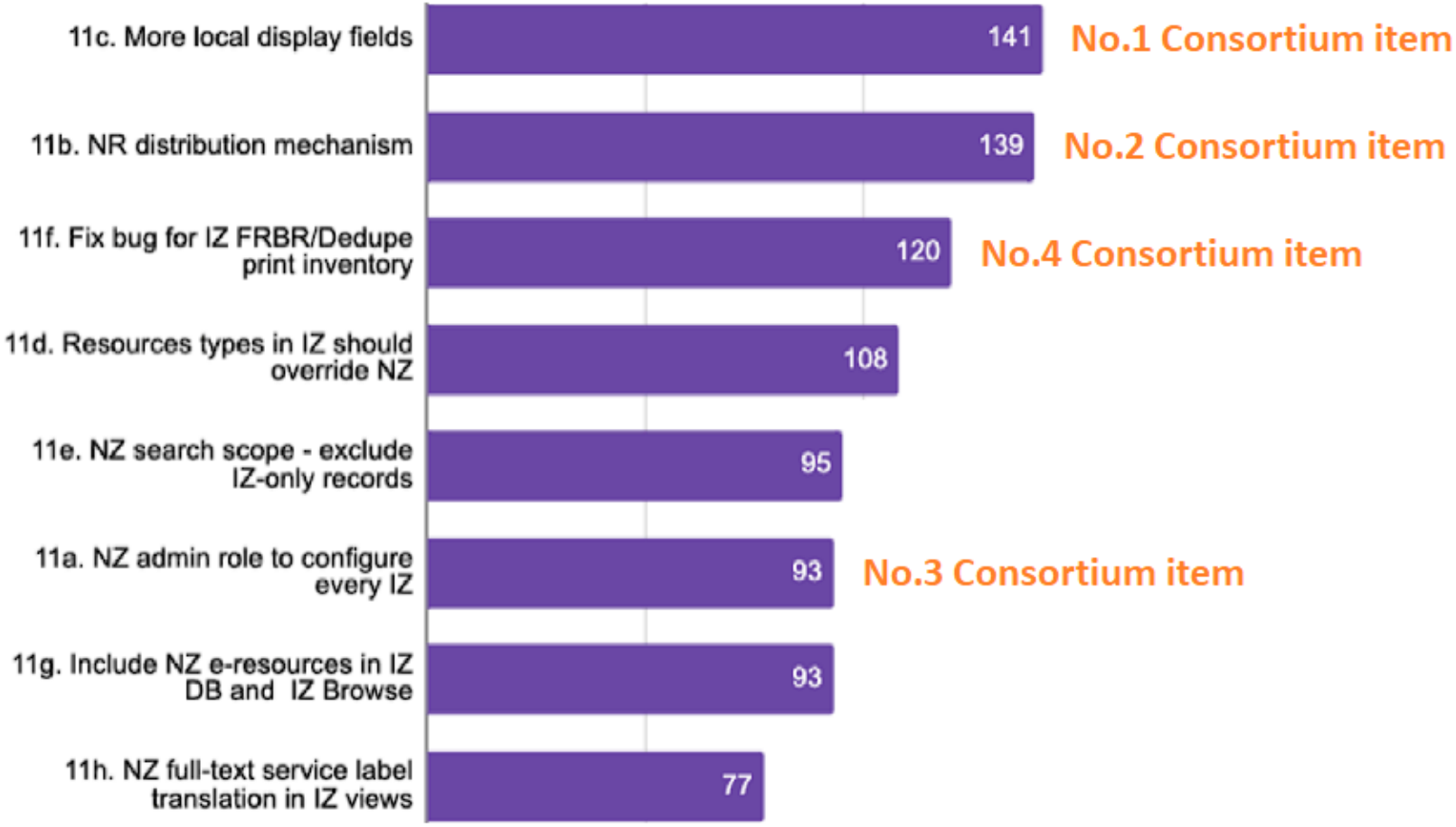
Summary – Feature and Infrastructure

Overall raw results of Q.8, 9, 10 >>> Priority development items highlighted in report



Summary – Consortium Items

Overall raw results of Q.11 >>> Priority development items highlighted in report



Next steps...

30 April 2024
Report submitted
Mid May 2024
ELUNA Conference
7 June 2024
Finalised 2024 Enhancements
(with some VE wins)
11 July 2024
1st dedicated meeting
(Requested 24 May)
31 Jul 2024
Meeting: Roadmap – External Sources in Collection Discovery
22 Aug 2024
2nd dedicated meeting
(Requested 19 July)
Mid Sep 2024
IGeLU Conference
26 Sep 2024
3rd dedicated meeting
(Requested 23 August)
Nov 2024
External sources in Collection Discovery
End of 2024
2025 Roadmap development

Updates thus far – Feature capabilities

Discussed December 2023, Enhancement cycle June 2024, and 1st meeting July 2024

- **8c. Edit OTB** – Longstanding key issue. Looking at two fields for search, facet, addata (browse is already denied). Aligned with 7th in 2024 cycle *#9000 Edit the out-of-the-box search and facet rules*
- **8d. More fields** – Can be increased by request already (not currently documented). Expand for all?
- **9d. Resource type config, include DB** – Conditions previously expanded with *#8790* in 2022 cycle, but more expansion needed and coverage of Database type
- **9c. Mapping tables for NR** – Only one mapping table now for translation, with *reasonable* fit-for-purpose table solution needed

Research + Consultation

WG/s providing supporting documents and use cases + Ex Libris exploring options

Updates thus far – Infrastructure concerns

Discussed December 2023 and 2nd meeting August 2024

- **8a. Search performance** – Go VE process, caching, and deliberate delayed loading eg search results over facets for performance
- **8b. Outages** – Not *always* both Alma + Primo VE. No technical way to locally configure separate error page
- **8g. Ghost records** – Go VE process, "transient" effects of import profile delete/reload, and some "expected"
- **8l. Collection Discovery** – Some due to manner of navigation. Collection Path immediate by Alma DB update. Collection Lobby up to 15 minutes by VE reindexing. Alma's 'View in Discovery' even longer by Alma index search for records holding a Collection ID link

Ex Libris investigation

Review and share back to WG/s improvement plans for better UI load strategies and underlying indexing methods, and maintenance period reduction

Updates thus far – Consortium items

Discussed 2nd meeting August 2024

- **11c. More local display fields** – Ex Libris not aware of any consortia which has gotten near to the current available fields. But regardless, not much leeway for increasing the number
- **11b. NR distribution mechanism** + **11a. NZ admin role for IZ** – Question if covered by discussions with Consortia Working Group/s, as part of the Consortia Central Configuration Dashboard project (Alma August 2024)
- **11f. FRBR/Dedupe IZ bug** – As above, with Ex Libris not aware & needing examples + potential overlapping group discussions

Cross-group check-in

Primo WG/s project group query 28 August to Consortia WG/s

Summary

Primo BO to VE Feature Alignment Project

Genesis – Goals – Timeline – Project members – Links

Stages

1. Gathering + Curating > Survey
2. Analysing + Deciding > Report
3. Summaries: Priority development items
4. Next Steps + Updates thus far

Questions?

Questions?

Stacey van Groll
Manager, Discovery and Access
s.vangroll@uq.edu.au

CRICOS 00025B