

**IGeLU 2024**



9TH - 12TH SEPTEMBER

# IGeLU Primo Working Group

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Open Meeting – IGeLU Conference 2024

# Agenda

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- **Members & Roles**
- **Enhancements Cycle**
  - 2024
  - 2023
- **Special Projects**
- **Community Support**
- **Advocacy Items**
- **Future Plans**
- **Q & A**

## Primo Product Working Group

### About

The IGeLU Primo Working Group was formed in 2009. This was in recognition of the need for representation for the growing international Primo user community, for Primo as a product launched in 2007.

The objective of the IGeLU Primo Working Group is collaboration with Ex Libris for Primo product development, including consultation on new and existing features and services, and advocacy on behalf of the Primo community. A core activity within this is conducting the annual Primo enhancements voting process, in close collaboration with the separate [ELUNA Primo Working Group](#). Other activities include assisting with planning for the annual IGeLU Conference, participation in Focus Groups, management of the Primo community listserv, and regular meetings with Ex Libris Product Management.

The Primo community listserv is owned by the IGeLU and ELUNA organisations 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 Primo users community. Subscription approval is by institution domain email for recognisable named individuals (for example `firstname.lastname@library`) currently employed at sites licensing Ex Libris products, in addition to Ex Libris staff and affiliates by email domain. Internal distribution lists and institution managed group email accounts (including where recipients and posters may be 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](mailto:primo@exlibrisusers.org)

Contact the Coordinator at [primo@igelu.org](mailto:primo@igelu.org)



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# Members & Roles

- **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*

Member	Site	WG Role and Special Projects
<b>Stacey van Groll</b>	University of Queensland, Australia	<b>Coordinator</b> ; Conference Planning ; Enhancements ; Primo BO to VE Feature Alignment Project – Lead ; Aha Implementation ; CDI Enhancements Trial
<b>Mark Kluzek</b>	University College London, UK	<b>Deputy Coordinator</b> ; AI-powered Research Assistant – Beta Program Focus Group
<b>Nir Zinger</b>	University of Haifa, Israel	<b>Enhancements Coordinator</b> ; Next Discovery Experience UI Focus Group ; Primo BO to VE Feature Alignment Project ; Aha Implementation ; CDI Enhancements Trial
<b>Noémie Ammann</b>	ETH Library, Switzerland	<b>Liaison to the Content WG</b> ; Primo BO to VE Feature Alignment Project
<b>Gaith Bader</b>	University of New South Wales, Australia	<b>Enhancements Team</b> ; AI-powered Research Assistant – Beta Program Focus Group
<b>Paul Harding</b>	University of York, UK	<b>Liaison to the Analytics CoP</b> ; Next Discovery Experience UI Focus Group ; Primo Engagement Analytics (Mixpanel) Focus Group
<b>Ulrich Leodolter</b>	OBVSG, Austria	<b>Developer Community Liaison</b> including for NDE UI ; Primo BO to VE Feature Alignment Project
<b>Manuela Schwendener</b>	Universität Basel, Switzerland	<b>Enhancements Team</b> ; Next Discovery Experience UI Focus Group
<b>Andrea Zech</b>	Free University Berlin, Germany	<b>Enhancements Team</b> ; Primo BO to VE Feature Alignment Project ; Primo Engagement Analytics (Mixpanel) Focus Group

# Enhancements Cycle - 2024

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**Up to January 13: Submission deadline** for new enhancement requests (*closed 1 week early*)

- Submissions: 125 New, reviewed by joint Enhancements Team of IGeLU Primo WG (*Nir, Stacey, Manu, Gaith, Andrea*) and ELUNA Primo WG members (*7 weeks*)
- Movements: 4 Primo > Alma || 2 Alma > Primo || 9 Primo > CDI
- Not Votable: 1 merged, 2 Roadmap, 3 defects, and 7 already supported

**March 4-March 29: Voting** (*4 weeks, open for 1 extra week*)

- 99 Votable submissions
- 57,829 votes placed by 391 accounts (*A new record! 2023 = 51,229 by 332 and 2022 = 56,033 by 379*)

# Enhancements 2024 - cont.

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**April 2: Results provided** to Ex Libris Primo Product Management *(1 week early)*

- Request for assignment of development points to the Top 20, per the [Product Development Collaboration Agreement](#)
- **Note:** We provide to Ex Libris details of full votes for all Votable submissions as well as the total number of institution/consortia accounts voting on each, as valuable information on the extent of community interest. *This does not influence the official “winners” by rank*

**April 2-May 31: Scoping and pointing** period and discussions *(8 9 weeks)*

**June 4:** Special extra meeting, with deadline overrun by a few days

**June 7: Results announced** after the IGeLU Primo WG & ELUNA Primo WG Coords determined in collaborative discussions with Ex Libris that an additional voting round was not needed

# Enhancements 2024 - Results

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Successful submissions to be delivered within one year in New UI and NDE UI – **155 points**

- *50 points less than 200 per current PDCA, due to CDI Enhancements Trial*
- *5 borrowed from 2025, pending 2023 #8134 HTML for closed list of 30 labels*

Rank	ID	Title	Votes	Points
1	9021	A better DEI Term Tool	3,283	40
2	8756	Primo VE Facet for physical availability, configurable for locations / policy	3,064	50
3	8871	Primo VE Advanced search – Exact – Title: \$a alone must find results	2,953	15
5	8760	Add A-Z to Database and Journal Search in Primo VE	2,763	30
9	8810	Add the ability for patrons to change the default sort	1,333	20

# Enhancements 2024 - Results cont.

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Also to be delivered as additional enhancements for the **NDE UI only**, in 2025 from May

Rank	ID	Title	Votes	Points
8	7799	Add facets to Collection Discovery <ul style="list-style-type: none"><li>• <i>Ex Libris advised potential delivery in the May 2025 General Release of the NDE UI, but otherwise will be delivered in the NDE UI in 2025</i></li></ul>	1,758	n/a
18	8868	Resource Type Filter Ribbon: after a search, distinguish between resource types with and without results <ul style="list-style-type: none"><li>• <i>Ex Libris advised delivery in the May 2025 General Release of the NDE UI</i></li></ul>	1,045	n/a
19	8970	Consolidate My Library Card display of loans/requests from all institutions in the network <ul style="list-style-type: none"><li>• <i>Ex Libris advised potential delivery in the May 2025 General Release of the NDE UI, but otherwise will be delivered in the NDE UI in 2025</i></li></ul>	1,040	n/a

# Enhancements 2024 - Results cont.

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Also, research and consultation item with Roadmap commitment

- *No.1 Feature Capability highlighted on the Primo BO to VE Feature Alignment Project and Report*
- *also 10th in 2023 #8130 Increase number, normalization, and indexing options for local fields (VE)*
- *and flagged way back from the beginning in the 2018 Primo VE Summit and Report*

Rank	ID	Title	Votes	Points
7	9000	<p>Edit the out-of-the-box search and facet rules in Primo VE</p> <ul style="list-style-type: none"><li>● <i>Ex Libris statement: "Following our discussion, we will not be able to continue with this enhancement via NERS process. As this is also mentioned in report from the community we do intend to add it to our roadmap and invest time in a research phase to check how to support custom of selected fields, we will work with the working group on concept of possible solutions."</i></li></ul>	1,940	n/a



# Enhancements 2023 - Delivery

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ID	Title	Delivery
8126	Ability to do a bulk export of search results (VE/BO)	Aug 2024
8210	Prevent search results expansion by use of exact phrase (VE/BO)	Aiming for Nov 2024
8134	Allow HTML coding in labels, public notes and collection description (VE/BO) <ul style="list-style-type: none"><li>• Consultation item for a closed list of 30 labels</li></ul>	Phase 1 Feb 2024 + Phase 2 Nov 2024
8157	Preserve the formatting of citations copied from Primo (VE/BO) <ul style="list-style-type: none"><li>• Additional item for 2024 Roadmap</li></ul>	Nov 2023
8141	Add ability to configure the display at the item level and the location level in the GetIt section (VE) <ul style="list-style-type: none"><li>• Additional item for 2024 Roadmap</li></ul>	Feb 2024

**FLAG:** Ongoing issue raised of need to improve consultation and UAT, with currently no preview environment available for testing and evaluation. This can be problematic for both system aspects and delivery timing, as it may delay enhancements release, but it would likely have benefits for smoother rollouts with fewer bugs

# Special Projects - Focus Groups

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## Next Discovery Experience (NDE) in Primo VE - *Four Pillars*

- **1. Next Discovery Experience User Interface Focus Group** (NDE UI) from July 2023 with *Manu, Paul, Nir*, as well as *Ulrich* (Dev liaison) — **First view Feb 2025 + First release May 2025**
- **2. Primo Engagement Analytics MixPanel Focus Group** from March 2024 with *Paul* and *Andrea* — **Early adopter Sep-Nov 2024 + First release May 2025 (with NDE UI)**
- **3. AI-powered Research Assistant - Beta Program Focus Group** from late June 2024 with *Mark* and *Gaith* — **First release ~~Nov 2024~~ Sept 2024 Release Update (announced 9 Sept)**
- **4. Linked Open Data Focus Group** from mid 2023, with no direct Primo WG group members — **First release in current New UI May 2024, with Related Persons feature**

**Also** - Significantly enhanced the [Primo WG Special Projects](#) page to add current and historical information, sharing both active item updates and showcasing the efforts of the IGeLU Primo WG over 15 years

# Special Projects - Alignment Project

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## Primo BO to VE Feature Alignment Project - with IGeLU Primo WG and ELUNA Primo WG

- **Initiated May 2023 > Survey February-March 2024 > Report submission April 2024**
  - Project Group: *Stacey, Nir, Andrea, Ulrich, and Noémie + ELUNA Primo WG members*
- **Community updates thus far**
  - **May 2024:** ELUNA Annual Meeting, Corinna Baksik (ELUNA Co-Lead) - [pptx](#)
  - **May 2024:** Shared on the Primo listserv and posted to the [IGeLU](#) and ELUNA websites
  - **June 2024:** ANZREG Conference, Stacey van Groll (IGeLU Co-Lead) - [pptx](#) + [Youtube](#)
  - **Sept 2024:** IGeLU Conference, Stacey van Groll (IGeLU Co-Lead) - [yesterday!](#)

# Special Projects - Additional

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## Aha Implementation

- **Active 2023-2024** from the **2021-2022 Enhancements Task Force**, with *Stacey* and *Nir*
  - **BIG NEWS!** Fond farewell to “old” NERS (2010-2024). Welcome to the new **Enhancements portal** on **Aha** for gathering enhancements from 2025, and **ElectionBuddy** for voting

## CDI Enhancements Trial

- **Active in 2024 and 2025**, with *Stacey* and *Nir*, supporting the primary group Content WG
- 2024 Enhancements taken from Primo 2023 and 2024 submissions (9 of 10), and Summon 2023 submissions (1 of 10), with 50 points each from Primo and Summon for total 100 for CDI

# Community Support

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- **New resources** linked to the [Primo Community Support](#) page on the IGeLU website
  - [Primo VE Discovery Import Profile Normalization Rule GitHub Repository](#), led by ELUNA Primo WG in collaboration with Lincoln University out of the November 2023 ANZREG Hackathon: *Creating XML normalisation rules for external sources within Alma VE*
  - [Ex Libris Search](#) - search engine limited to Ex Libris web content, as created and maintained by James M. Day, Embry-Riddle Aeronautical University
- **Expanded - [Primo Sites and URLs](#)** up to 760 entries! (*was 450 when launched in 2023*)
- **[Meeting notes](#)**: Available monthly from January 2022, and promoted via the listserv from October 2023 for extra visibility (*per discussion together at our last IGeLU 2023 Open Meeting*)
- Primo WG members are **presenting sessions at IGeLU 2024 Conference**, sharing our work collaboratively with our community: *Paul and Stacey*

# Advocacy Items +

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- **Product development consultation** Nov 2023 for cataloging standards LDR/008 aligning Magazine and Magazine Article type added to CDI Aug 2023
- **Rollout consultation** Oct and Nov 2023 for CDI Quicklinks enablement shift, advocating on behalf of the community to not change simply to opt-out in Feb 2024. Instead implement by initial change notice in Feb 2024 and then give three months until May 2024 for sites to change settings away from true
- **Documentation improvements** Feb 2024 for enhanced information for display fields in Primo for CDI records - [CDI List of Display / PNX Fields](#)
- **Roadmap availability** Feb 2024, advocating for earlier Roadmap release and webinar, securing agreement for this to be done by Primo PM in mid-late January rather than mid-late February from 2025
- **Idea Exchange engagement** Apr/May 2024 cross-group collaboration effort for cleanup and consistent handling. Primo ideas closed with less than 30 individual account votes, PM assurance of dedicated review ongoing, and each year effort. Documentation pending
- **Person Card** May/Jun 2024, boosting community discussions by highlighting feedback on limited configuration and documentation gaps, and providing additional input and use case suggestions
- **CDI Index Update impact on Primo** Jun 2024, raising concern of failures to update of delayed or skipped System Status updates, securing agreement from PM to resume these updates
- **Consultation items** for OTB changes in VE rules, such as request Jul 2024 to include \$0 for many fields like 100, 130, 240, 650, 700 etc

# Future plans

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- **Enhancements delivery planning and monitoring**, including advocacy for UAT opportunities
- **Follow up to the Primo BO to VE Feature Alignment Project**, for Roadmap commitment delivery
- **CDI enhancements trial** ongoing, with 50 points from Primo > CDI in 2024 and 2025
- **New Enhancements Request System (NERS) platform transition** from custom build platform to vendor platform “Ex Libris Users Enhancements Portal” on Aha and voting on ElectionBuddy
- **Next Discovery Experience - 4 Pillars Focus Groups**, including AI Research Assistant anticipated in November 2024, and Mixpanel and UX planned for general release in May 2025
- **Collaboration with WGs and CoPs** in liaison activities, and in cross-group initiatives
- **Community advocacy and support**, as opportunities and issues arise
- **Conference preparations** for 2025

# Q & A

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**Any questions?**