IGeLU Primo Working Group

Open Meeting - IGeLU Conference 2025

Agenda

- **Members & Roles**
- **Enhancements Cycle**
  - 2025
  - 2024
- **Special Projects**
- **Community Support**
- **Advocacy Items**
- **Future Plans**
- **Q & A**

Primo Product Working Group

ExLibris

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 the Primo product launched in 2007.

The objective of the IGeLU Primo Working Group is collaboration with Ex Libris Primo Product Management for Primo product development, including consultation on new and existing features and services, and advocacy on behalf of the Primo community.

A primary activity of the IGeLU Primo Working Group is responsibility for managing the annual Primo enhancements process, and delivery monitoring of successful accepted submissions, in close collaboration with the separate ELUNA Primo Working Group.

Other activities include:

- supporting the annual IGeLU Conference
- participation in Focus and Advisory Groups, and special projects
- management of the Primo community listserv
- and regular meetings with Ex Libris Product Management.

Contact the Coordinator at primo@igelu.org

- News
- Special Projects
- Community Support
- Enhancements Portal
- Primo Enhancements
- Mailing Lists & Archives
- Minutes
- Terms of Reference

Members & Roles

- **Liaison from the Alma WG** – *Emma Clift, Macquarie University*
- **Liaison from the LOD CoP** – Farewelled in April: *Ebe Kartus, NLNZ*
- **Liaison from the IGeLU Steering Committee** – *Asbjørn Risan, UNIT*

Member	Site	WG Role
Stacey van Groll	University of Queensland, Australia	**Coordinator** and **Conference Planning Committee**
Mark Kluzek	University College London, UK	**Deputy Coordinator** and **Liaison to the LOD CoP**
Nir Zinger	University of Haifa, Israel	**Enhancements Coordinator**
Gaith Bader	University of News South Wales, Australia	**Enhancements Team**
Andrea Zech	Free University Berlin, German	**Enhancements Team**
Manuela Schwendener	Universität Basel, Switzerland	**Enhancements Team**
Ulrich Leodolter	OBVSG, Austria	**Developer Community Liaison**
Noémie Ammann	ETH Library, Switzerland	**Liaison to the Content WG**
Paul Harding	University of York, UK	**Liaison to the Analytics CoP**

Enhancements 2025 - Reviewing

January 19: **Submissions closed** for new enhancement requests

- **97 New** - reviewed by joint Enhancements Team of IGeLU Primo WG (*Nir, Stacey, Manu, Gaith, Andrea*) and ELUNA Primo WG members *(6.5 weeks, but many internal deadlines)*

Deadlines

- Jan 15 – Kickoff Enhancements Team meeting
- **Jan 19 – Submissions closed**
- Feb 3 – Submissions identified for move to Alma (and vice versa) = *1 Primo to Alma and 3 Alma to Primo*
- Feb 7 – Contact done with submitters if needed
- Feb 13 – Midway Enhancements Team meeting
- Feb 21 – Responses from submitters
- Feb 28 – Hands off for overall checks = *6 merged, 1 Roadmap, 3 already supported / defect, 1 no response*
- Mar 3 – Send Request ID and Request Names to SC for Voting Portal 1 week in advance
- Mar 8 – Spreadsheet shared on listserv in advance of ballot opening
- **Mar 10 – Ballot open for voting**

Enhancements 2025 - Vote > Pointing

March 10-April 8: Voting ballot on **89 Votable** submissions (*4 weeks*)

April 11: **Results provided** to Primo Product Management
- Request for scoping and pointing for the Top 20, per the <u>Product Development Collaboration Agreement</u>
- All votes are shared, access all Votable submissions
- Total number of institution/consortia accounts voting on each request is no longer available to be shared, as the CERV Voting Portal (ElectionBuddy) does not provide this data

April 11-June 6: **Scoping and pointing** period and discussions *(8 weeks)*
- **May 5 + May 19:** Monthly meetings with PM
- **June 5:** Extra meeting with PM, with immediate notice of second ballot

Enhancements 2025 - Decisions

Holding a second ballot considers several factors including

- Scoping information alignment and coverage with the original requests
- The number and voted ranking of requests which PM declines to develop
- Development points allocated to requests by the voted ranking and against the overall available development points for Primo for the cycle (200 development points in 2025)
- Current product development initiatives, such as the roll-out of the NDE UI bringing delivery of items without requiring expenditure of community development points
- Time and effort for the IGeLU and ELUNA member community in engaging with an additional ballot

June 5: Decision finalised, with immediate notice of second ballot to listserv

- Jun 9 – Send Request ID and Request Names to SC for Voting Portal 1 week in advance
- Jun 11 – Last scoping clarifications from PM
- Jun 12 – Updating Enhancements Portal
- Jun 13 – Spreadsheet shared on listserv in advance of ballot opening
- **Jun 17 – Ballot open for voting** on 13 Votable requests pointed and scoped by PM

Enhancements 2025 - 1st round declined

Primo PM **declined** to develop the following requests, as is their right under the PDCA

Rank	ID	Title	Votes
6	PENH-I-28340	**Combine Two or More Recent or Saved Searches**	2,180
9 (Alma)	AENH-I-36428	**Replace "Do not show as Full Text available in CDI even if active in Alma" with a pair of show local / show CDI checkboxes** *Note: This submission was moved from Alma to Primo after the earlier first ballot, by decision of Alma and Primo PMs*	1,925
13	PENH-I-28389	**Increase number of possible local search/facet fields to at least 20** *Note: This request is correlated to the No.2 ranked Feature Capability item on the <u>Primo BO to VE Feature Alignment Project Report</u> (April 2024) by the IGeLU Primo Working Group and ELUNA Primo Working Group. As part of collaborative work with PM on the report's highlighted items, the option to increase the number of fields was advised to be possible by Support case request, with this submission requesting that the fields be increased for all by default. By request of the IGeLU and ELUNA Primo Working Groups, information on this option was added to the <u>documentation</u>: "If more than 10 custom local fields are required, please open a Support ticket and provide and explanation of its use case for evaluation."*	1,557
15	PENH-I-28361	**Add a Research Assistant Configuration Tool**	1,425

Enhancements 2025 - 1st round extra

Primo PM advised these requests would be delivered as **extra** enhancements outside of CERV

Rank	ID	Title	Votes	Points
2	PENH-I-28385	Remove incremental lazy load for Primo VE brief results when the Number of Results is set to 25 and 50	2,984	n/a
9 (Primo)	PENH-I-28314	Automated SSL certificate management by supporting ACME-like services	1,772	n/a
13	PENH-I-28355	Ability to search across sub-collections within a collection	1,586	n/a
20	PENH-I-28294	Book cover images for generic FRBR results	1,282	n/a

Enhancements 2025 - 1st > 2nd Votable

13 Votable submissions in the 2nd round, with 1st round votes and rankings

1st Rank	ID	Title	1st Votes	Points
1	PENH-I-28298	Support the use of wildcards in phrase searching with quotation marks	3,767	50
3	PENH-I-28371	Add ability to select multiple options on Advanced Search drop down menus	2,376	60
4	PENH-I-28292	Searchable field codes	2,341	70
5	PENH-I-28301	Improve content matching for "Highlight reference entry on top" to preference newer content	2,251	80
7	PENH-I-28386	Provide the ability to view historic requests including Alma Resource Sharing requests	2,171	30
8	PENH-I-28383	Add the ability to export to excel in one file all Codes from all Code Tables and associated data, under Discovery > Display Configuration > Labels for Primo VE	1,953	35
10	AENH-I-36385	Allow Online Services Order to sort by current access	1,709	40
11	PENH-I-28278	Add a resource type for abstracts in CDI	1,591	25
14	PENH-I-28362	Research Assistant and local records	1,431	50
16	PENH-I-28330	Need efficient way to test discovery norm rules	1,384	30
17	PENH-I-28360	Primo VE home page: edit box	1,370	45
18	PENH-I-28350	Include Holdings library, location, and call number for physical items in Excel/CSV Export	1331	35
19	PENH-I-28335	Allow better patron control over research history stored in the Primo Research Assistant	1322	60

Enhancements 2025 - 2nd round results

Successful submissions to be delivered within one year – **200 points available in 2025**

Primo PM additionally agreed to include No.5 in the 200 available points – **thank you!**

Rank	ID	Title	Votes	Points
1	PENH-I-28298	Support the use of wildcards in phrase searching with quotation marks	8991	50
2	AENH-I-36385	Allow Online Services Order to sort by current access	6486	40
3	PENH-I-28362	Research Assistant and local records	6206	50
4	PENH-I-28330	Need efficient way to test discovery norm rules	5031	30
5	PENH-I-28360	Primo VE home page: edit box	4800	30 ~~45~~

Enhancements 2025 - 1st > 2nd variation

Key takeaway - There was quite a variation in some rankings between the 1st and 2nd rounds

2nd Rank	1st Rank	ID	Title
1	1	PENH-I-28298	Support the use of wildcards in phrase searching with quotation marks
2	10	AENH-I-36385	Allow Online Services Order to sort by current access
3	14	PENH-I-28362	Research Assistant and local records
4	16	PENH-I-28330	Need efficient way to test discovery norm rules
5	17	PENH-I-28360	Primo VE home page: edit box
6	8	PENH-I-28383	Add the ability to export to excel in one file all Codes from all Code Tables and associated data, under Discovery > Display Configuration > Labels for Primo VE
7	11	PENH-I-28278	Add a resource type for abstracts in CDI
8	3	PENH-I-28371	Add ability to select multiple options on Advanced Search drop down menus
9	18	PENH-I-28350	Include Holdings library, location, and call number for physical items in Excel/CSV Export
10	7	PENH-I-28386	Provide the ability to view historic requests including Alma Resource Sharing requests
11	5	PENH-I-28301	Improve content matching for "Highlight reference entry on top" to preference newer content
12	4	PENH-I-28292	Searchable field codes
13	19	PENH-I-28335	Allow better patron control over research history stored in the Primo Research Assistant

Big picture - Voting trends snapshot

Key takeaway - There isn't a clear direct correlation with a closed versus open ballot

1st	2019	2020	2021	2022	2023	2024	CERV 2025
Votes	32,491	36,087	50,990	56,033	51,229	57,829	66,790
1	8.65%	10.31%	6.16%	5.84%	5.88%	5.68%	**5.64%**
2	8.19%	7.46%	5.82%	5.46%	5.87%	5.30%	**4.47%**
3	6.43%	6.51%	5.51%	5.18%	5.57%	5.11%	**3.56%**
4	6.28%	5.30%	5.35%	5.10%	5.19%	4.83%	**3.51%**
5	6.02%	5.10%	5.18%	4.56%	5.18%	4.78%	**3.37%**
6	5.95%	4.86%	4.55%	4.29%	3.73%	3.70%	**3.26%**
7	4.95%	4.63%	4.20%	3.38%	3.38%	3.35%	**3.25%**
8	4.71%	4.51%	4.16%	3.06%	3.02%	3.04%	**2.92%**
9	3.75%	3.07%	3.10%	2.85%	2.86%	2.31%	**2.65%**
10	3.52%	2.64%	2.75%	2.85%	2.84%	2.24%	**2.56%**

2nd	2020	2022	2023	CERV 2025
Votes	36,625	47,645	46,431	59,807
1	17.88%	9.00%	13.93%	**15.03%**
2	14.60%	8.91%	12.18%	**10.84%**
3	14.24%	8.36%	11.38%	**10.38%**
4	10.97%	8.35%	7.65%	**8.41%**
5	8.67%	7.65%	7.54%	**8.03%**
6	6.30%	7.59%	7.49%	**7.97%**
7	5.42%	7.26%	6.31%	**7.84%**
8	4.34%	6.84%	5.42%	**7.24%**
9	4.34%	5.00%	5.21%	**6.82%**
10	4.06%	4.87%	4.59%	**6.39%**

Big picture - Voting history snapshot

Key takeaway - Voting engagement continues to grow year on year

Year	Cycle	New	Votable	Sites	% change	Votes
2019	1	93	58	251	-	32,491
2020	1	123	97	280	+11.5%	36,087
	2		13	266	-	36,625
2021	1	130	98	358	+27.8%	50,990
2022	1	129	108	379	+5.8%	56,033
	2		17	294	+10.5%	47,645
2023	1	144	119	332	-12.4%	51,229
	2		17	298	+1.3%	46,431
2024	1	125	99	391	+17.7%	57,829
2025	1	97	89	494	+26.3%	66,790
	2		13	417	+39.9%	59,807

Enhancements 2024 - Delivery

Summary update of delivery timelines, for the **2024 successful requests**

Rank	ID	Title	Votes	Delivery
1	9021	A better DEI Term Tool	3,283	Nov 2025
2	8756	Primo VE Facet for physical availability, configurable for locations / policy	3,064	Nov 2025 + semi-annual indexing Feb 2026
3	8871	Primo VE Advanced search – Exact – Title: $a alone must find results	2,953	Aug 2025
5	8760	Add A-Z to Database and Journal Search in Primo VE	2,763	May 2025
9	8810	Add the ability for patrons to change the default sort	1,333	Feb 2025

Enhancements 2024 - Delivery cont.

These requests were also identified to be delivered as additional enhancements in the 2024 enhancement cycle, for the NDE UI only

Rank	ID	Title	Votes	Points
8	7799	Add facets to Collection Discovery ● *PM advised potential delivery in the June 2025 General Release of the NDE UI, but otherwise will be delivered in the NDE UI in 2025*	1,758	n/a
~~18~~	~~8868~~	~~Resource Type Filter Ribbon: after a search, distinguish between resource types with and without results~~ ● *~~PM advised delivery in the May 2025 General Release of the NDE UI~~* **PM updated Feb 2025 that this will not be included**	~~1,045~~	~~n/a~~
19	8970	Consolidate My Library Card display of loans/requests from all institutions in the network ● *PM advised potential delivery in the Nov 2025 General Release of the NDE UI, but otherwise will be delivered in the NDE UI in 2025*	1,040	n/a

Enhancements 2024 - Delivery cont.

Also, research and consultation item

- 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	Edit the out-of-the-box search and facet rules in Primo VE ● *PM 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."*	1,940	n/a

Special Projects - Alignment Project

Primo BO to VE Feature Alignment Project - IGeLU 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*

Key community updates thus far
- **May 2024**: ELUNA Annual Meeting
- **May 2024**: Listserv + websites
- **June 2024**: ANZREG Conference
- **Sept 2024**: IGeLU Conference

Latest for feature capability items
No.1 OTB fields edit: PoC demo Nov 2025
No.2 More local fields: Support case to 20
No.3 Rsrctype config: 2026 Roadmap candidate
No.4 Mapping tables: 2026 Roadmap candidate

Special Projects - NDE

Next Discovery Experience (NDE) in Primo VE

- **Next Discovery Experience User Interface Focus Group** (NDE UI)
  - July 2023> with *Manu, Paul, Nir* & 2024 **Customisation group** with *Ulrich, Andrea*
  - ~~Early access Nov 2024 and first General Release May 2025~~ (as advised in Feb 2025)
  - First early access feedback group Feb 2025
  - Managed General Release May 2025, if committing in Mar/Apr 2025 to switchover by March 2026
  - General Release (Self-switch) November 2025

- **Primo Engagement Analytics MixPanel Focus Group**
  - Mar through Dec 2024 with *Paul + Andrea*
  - Early adopter Sep-Nov 2024 + First release May 2025 (with NDE UI)

Special Projects - Enhancements on CERV
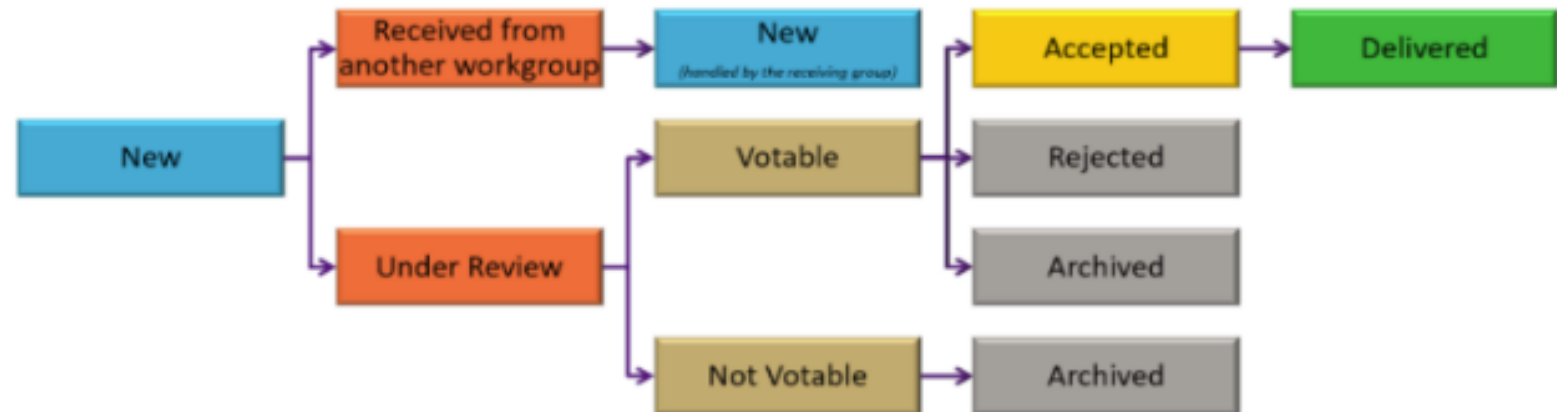
CERV Implementation

Active 2023-2025 from the **2021-2022 Enhancements Task Force**, with *Stacey* and *Nir*
- **Oct 2024**: Officially shifted over from **NERS** (**N**ew **E**nhancements **R**equest **S**ystem) to **CERV** (**C**ommunity **E**nhancement **R**equest and **V**oting) with new **Enhancements portal** (Aha) and **Voting Portal** (ElectionBuddy)
- **2025**: First Primo enhancements cycle in CERV

GUIDE - ENHANCEMENTS PORTAL (IGeLU AND ELUNA)

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Special Projects - CDI Enhancements Trial

Active in 2024, with *Stacey* and *Nir*, supporting the primary group Content WG
- Started with the CDI Advisory Group 2021-2023
- 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

2024 Trial findings, as announced by Steering Committee in March 2025
- Enhancement requests related to CDI are connected to products, rather than cross-product
- Pointing for the requested development was too costly to move forward under CERV
- A great deal of additional work was generated without any substantial product development

Outcome and next steps
- Trial discontinued after 2024 cycle, without running the originally planned second cycle in 2025
- 50 points each returned to Primo and Summon for the 2025 cycle
- Two 2024 cycle successful enhancements #8207 CDI coverage report and #8214 Transcript type in Primo, to be delivered in second half of 2025
- PMs to review the 2025 requests and provide feedback to SCs on which are CDI relevant, cost of their development, and scope in Primo, Summon or both

Community support

Primo Community Support

- New page for hidden configuration options
- More bookmarklets added
- Adjusted Primo Site URLs list to split into VE, VE NDE UI, and BO
- Working with Primo PM and ELUNA WG on NDE resources hosted on the Developer Network

IGeLU Conference presentations by Primo WG members: *Andrea, Nir, Stacey*

Meeting notes: Continuing to be shared monthly from January 2022, promoted via listserv from October 2023 for extra visibility

Primo – Community Support

The Primo Working Group supports our community by providing and linking to helpful community-developed documentation

- Primo – Useful bookmarklets – various tools, tips, and tricks
- Primo VE – Hidden configuration options – poorly documented settings which may not be visible to Discovery Administrators
- Primo Sites and URLs – google sheet with several hundred sites and their corresponding direct Primo URLs (not all-inclusive)
- Primo views – collaborative community member created site for Primo resources
- Ex Libris documentation – parent page for Primo, including Roadmaps and Release Notes
- Ex Libris Search – search engine limited to Ex Libris web content, as created and maintained by James M. Day, Embry-Riddle Aeronautical University
- ELUNA Primo WG additional resources, including *Tips for submitting enhancement requests* and *Customization and Developer Resources*
- Primo VE Discovery Import Profile Normalization Rule GitHub repository – ELUNA Primo WG

Advocacy highlights

- Secured scheduling change agreement for **quarterly webinar timing** to better align with Sandbox releases and support community preparation

- Provided feedback on **documentation**, including encouraging clear and comprehensive information for NDE items: Linked Open Data, AI Research Assistant, and the UI, particularly considering the adjusted availability timeline and staged rollout

- Supported **accessibility** improvements for the AI Research Assistant and the NDE UI, and updated documentation

- Consulted on several Primo VE OTB display and indexing **community change requests**

- Raised recurring concerns for **regressions and unexpected issues** introduced in releases, with a focus on improved quality assurance for release stability and early communication of known issues

- Shared **suggestions for feature improvement**, including Linked Open Data, AI Research Assistant, Collection Discovery, physical availability data access, email options, and personalisation feature control, as well as NDE UI elements for default facet display and configuration flexibility, which were key concerns raised by the community (Q1 2026)

- Raised ongoing advocacy for consistent handling of **Idea Exchange** to engage with and respond to the community

- Advocated for **issues resolutions**, including for a jQuery security issue in the CDI Activation Analysis Tool and vote return corrections by status updates in the Idea Exchange

Future plans

- **2025 Enhancements delivery planning and monitoring**, including advocacy for UAT opportunities

- **Community Enhancement Request and Voting (aka CERV),** continuing to improve processes and experience on the new platforms in 2026, with focus also on NDE UI for 2025 and ongoing

- **Follow up to the Primo BO to VE Feature Alignment Project**, for Roadmap commitment delivery

- **CDI enhancements trial delivery items**, supporting Content WG as needed with delivery

- **NDE - Next Discovery Experience** continuing advocacy and support with NDE UI rollout including support for community shared resources hosted on the Developer Network

- **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 2026

Q & A

Any questions?