



## **DEI, Primo, and Analytics Session Q & A**

### **What is NERS?**

This is the way we work with Ex Libris to request community voted enhancements

<https://ners.igelu.org/about.php>

### **How can we find out about and sign up for workshops when they become available?**

We will send out to the Primo mailing list and put on the ELUNA website.

### **Is it possible to share the CDI pain points document? That would be very helpful!**

This is in progress from the ELUNA Steering Committee.

### **Best way to use Primo statistics to tell a story?**

This is a great topic for a group discussion, and the Working Group will organize something to highlight some answers to this question.

Is there any documentation about the differences primo's Angularjs 1.6 vs. 1.8 environments?

Ex Libris has provided this documentation:

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Materials/Announcements/Preparing\\_for\\_the\\_Upgrade\\_to\\_Angular\\_1.8\\_in\\_Primo%2F%2FPrimo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Materials/Announcements/Preparing_for_the_Upgrade_to_Angular_1.8_in_Primo%2F%2FPrimo_VE)

### **Is there a way to tailor deduping without editing the bib record? I keep running into dedup issues based on incomplete NZ metadata.**

There is documentation available for this, for example see

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/090Dedup\\_and\\_FRBR\\_for\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/090Dedup_and_FRBR_for_Primo_VE).

But it is very challenging without access the bib record to solve all issues.

**Our consortium has mentioned having Primo the ability to search for an item by barcode. Do you have any comments or information about that? Our previous Discovery system Mango was able to do that. I was surprised Primo VE did not have that ability.**

Searching for an item by barcode is currently not available. There is a requested enhancement for this, so while it's a possibility for the future it may not make it through the process.

**Just started working with the Resource Recommender Config and am just curious if there are any new and exciting things people are doing with that.**

This is a great topic for a group discussion, and the Working Group will organize something to highlight some answers to this question.

**Could we create a clearing house of user testing scripts?**

Great idea for future developer community work.

**Can you expand on / explain what the problem was for the see-references from LCSH?**

A very surface level explanation is that there are 450 fields that are being shown in the facets--they don't appear in the records but can surface problematic terms even though the intention is to send users to the more current term. This is something we want to explore more as a community.

**Great conversation in the attendee chat: "Is there a document about harvesting digital collections (IRs) into either the IZ, NZ, CDI, or Primo VE that explains the pros and cons for each environment? Also - can you tell me about IIE functionality - does it work if you are only harvesting metadata".**

Great idea for future developer community work.

**We have governance issues at our institution over access to Discovery Admin, Primo Studio, sandboxes, Analytics, etc. to configure our Primo view. Faculty librarians are shut out and it really impedes our ability to do our jobs effectively. Does the PWG have a recommendation or best practice statement for Discovery Admin access for institutions?**

Not currently, but a number of us are faculty in our institutions and do have the subject or liaison point of view, and that's a great idea for a project to put this together.

**In my testing of the DEI Subject Term exclusion feature, it appears to not be applied to all records that might appear in a discovery search. Is there a way to know which collections are affected?**

Currently it is not possible to view to which collections this was applied but it should apply all, if you think this not the case, we encourage you to open a case with some examples where you see this happening. Please note that we don't change the metadata, only the display. So these terms should be still in the original catalog record.

**Will the term suppression tool be available in Primo classic AND Primo VE? (Classic user here)**

Yes, this is schedule to be released also for Classic

**Will we still be able to view consortia and "community" reports to save to our own folders and update them for our own purposes?**

Yes. the changes applied are Alma user interface changes. The general structure as it exists in Oracle Analytics Server (OAS) remains the same.

**Right now, if we've wanted to tell colleagues at other institutions where a report was we've had to give them the whole path to navigate. So when this is implemented it sounds like that whole path will change?**

No. The paths will remain the same. As mentioned above, the general structure is remaining the same. The changes are only in the Alma interface which is designed to give more information to the user. For example, the path will be presented now in the info section related to a report in Alma. This was not possible before.

**Will users still be able to get into oracle to customize reports, use SQL, some other advanced features? Or, will all of that advanced customization be available in Alma?**

Yes. there are no changes on the Oracle side, but only more information about reports available on the Alma side. Whatever is possible to do within OAS will remain the same.

**Will Analytics be in real time or still be the previous days?**

The infrastructure is not changing so the ETL schedule is staying as before (in most cases-daily refreshed data)

**Will creating reports still happen within the same interface?**

Yes. Creating reports remains on Oracle Analytics Server with its OAS UI.

**Do we opt in/out of early access as an institution or as individuals?**

Opt in and Opt out in the early access phase will be available for individuals though admins can take control and override the user's choice in case they decide to

**Will our current reports move over with the changes?**

Yes. existing reports will show up in the new layout with the existing permissions they had before.

**How will we be informed of training opportunities?**

For training opportunities- please review our webinar schedule from time to time:

<https://exlibrisgroup.com/customer-education-webinars/> . Before the new UI will be available, a webinar in the subject will be presented, recorded and available later on the Ex Libris YouTube channel:  
<https://www.youtube.com/user/ExLibrisLtd>

**So, there will still be a time lag with the data?**

The infrastructure is not changing so ETL schedule will stay as before (mostly daily refreshed data)

**Will you still be able to limit access to reports based on user role?**

Of course. Report permissions remain role based but additional capabilities to share with specific users will be added as an option admins can choose from.

**I'm a new librarian and want to get more into making reports on Alma. Are there some resources you suggest I look into to best prepare me and get me started.**

Of course. To learn more about creating reports in Analytics, here are a couple of useful links to look at:  
1.  
[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/080Analytics/010Introduction/The\\_Basics\\_of\\_Working\\_with\\_Analytics/050Creating\\_a\\_New\\_Report](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics/050Creating_a_New_Report). 2.  
Ex Libris Developer Network which includes a variety of tutorials about creating specific reports:  
<https://developers.exlibrisgroup.com/?s=analytics+report>

**Will our current reports move over with the changes?**

The reports are not actually "moving" but to answer your question they will be presented in the new layout as they did in the old layout. They will be available to use with the new improved capabilities like the new scheduling component.

**What version of Oracle is being moved too? Can we see documentation on that?**

We are planning to move to OAS version 6.4 in order to offer our users the most updated version Oracle offer. This will be presented in the July 2022 roadmap update. Additional features and improved UI are expected while the general workflow will remain the same.

**With phase 2 rollout of sharing emailed reports with external users, will there be privacy / security features enabled to prevent bad security practices?**

We are committed to privacy/ security and any feature released will have to be complied with this commitment. If we find risks in this area, they might delay feature release until we are fully complied.

**Will roles be changed?**

No. Roles will stay as before.

**Just institutional reports will be in Alma? How about shared reports?**

Any report that has been imported as an Object to Alma which means it had to be in a "shared folder" can be seen in Alma according to Admin permissions. Reports that were not imported by the admin will not be available to see in Alma.

**Will it be possible to limit the reports that are available in Alma? Not have all the reports move over?**

Just as is today, availability of reports in Alma depends on the Analytics admin. The admin decides which reports show up and are shared and which do not.

**What if we have reports that are not meant for public consumption? Can those be excluded from Alma?**

Just as is today, availability of reports in Alma depends on the Analytics admin. The admin decides which reports show up and are shared and which do not.