



## **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.

**Are there any general AngularJS tutorials or introductions on the web that you recommend?**

A few ideas: <https://www.youtube.com/watch?v=0E4TDq75rDE> and <https://docs.angularjs.org/tutorial> for walkthrough tutorials.

**Suggestion for helpful information: We would love a comparison document of Primo BO vs Primo VE to clearly see the differences as we evaluate migrating to Primo VE.**

We suggest reviewing the Go VE documentation to learn more about the phases and comparison [https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/Go\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Go_VE)

**Some of us are interested in having APIs and publishing options that allow full discovery in 3rd party tools such as Blacklight or others, without having to necessarily have Primo. Is there a working group for us?**

We have Alma customers using Blacklight, perhaps this should be discussed with the Alma working group.

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

Great idea for future developer community work.

**Our blended search profile that includes the Ebsco databases via an api. Doing any search will show Turkish as the main language for most of the results, which in fact it is not. The same search at another site that does not use the Ebsco api and you see they do not have the problem. Ex Libris asked us to put in an enhancement request. I was disappointed in that response. What you the WG suggest?**

We don't know the exact details. When searching the EBSCO API we are relying on their ranking algorithm and their response to return the most relevant results.

**Are Primo statistics only available for Back Office users?**

Primo Analytics is a shared component for both Primo and Primo VE. Primo VE customers can also use Primo Analytics, as well to learn usage details.

**My biggest ask for Primo VE/Alma is to enable better controls for the CDI collections. I want to be able to exclude collections from the Everything search. As it stands, if I enable Everything search by default, we have to see all sorts of less than ideal records that come from collections. On the other hand, if I turn off Everything, our searchers are not likely to Expand to see all the quality books and articles that they can request via ILL.**

We have recently released the feature to exclude full text matches in CDI, so you can test with the option to exclude to see if this answers your needs. In addition, we released an option to define specialized search scope in CDI. See more details

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/040Search\\_Configurations/010Configuring\\_Search\\_Profiles\\_for\\_Primo\\_VE#Defining\\_Specialized\\_Search\\_Scopes\\_for\\_CDI](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/040Search_Configurations/010Configuring_Search_Profiles_for_Primo_VE#Defining_Specialized_Search_Scopes_for_CDI)

**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.

**Follow up to the item record level indexing, is the barcode the only item level information being considered, or will it be other fields within the item records as well?**

Other fields may be related to item-level information that are currently not indexed in Primo VE or Primo BO for search.

**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 IIIE 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.

**From 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 IIIE functionality - does it work if you are only harvesting metadata.**

We suggest submitting case on this to get more information and assistance more specific for your needs.

**This might be a better question for the working group, but is there a Primo phone app that patrons can download and use to access our campus catalog more easily from their phones or a similar access point?**

Please see <https://exlibrisgroup.com/products/library-mobile/>.

**Do customers have the ability to prioritize different providers with QuickLinks? If not, if two databases have the article, how does primo pick the direct Link to send the user?**

This is in the roadmap. Planned for Q4 2022 is an option to set preference for Quicklinks or Link in record.

**Can a document or knowledge article be created with a complete comparison between Primo BO vs Primo VE? The current information available does not include all differences between the two that may affect our migration.**

We believe that you can read more on the GoVE process and try it yourself, rather comparing what is missing. The approach should be how functionality is implemented in VE to answer the need.

**QuickLinks are currently proxied by default. The documentation says that eventually, the proxying will be applied more intelligently. Quicklinks for OA content will not be proxied, whereas Quicklinks for locked content will be proxied. When will this improvement be coming?**

This is planned to be released in Q4 of 2022. WE will take into consideration OA indication and won't use Proxy for such CDI Links.

**We understand that there is a support case open about Quicklinks and Newspaper search. The newspaper search Quicklinks results is not being proxied. We heard this won't be fixed until November. We'd like to enable Quicklinks but feel we can't because we have Newspapers search. Please comment.**

This case is fixed for August 2022 release.

**We're not seeing multiple links (Link Resolver PLUS Link in Record) in Newspapers Search records -- only in Primo VE Search records -- will this functionality be added for Newspapers Search?**

Currently this is not in the roadmap for 2022.

**Are quicklinks still proxying all links? Back in March it was noted: "all Quicklinks are proxied in this first release whether they are open access or not." Is there any update on this?**

This is planned in Q4 2022, taking into account Open access indication before using proxy in Quicklinks.

**For Nili - how are disciplines assigned? Can a resource have more than 1 discipline? Are there resources without a discipline assigned?**

One resource can have more than one discipline. We have in total 58 disciplines. Disciplines are mapped via Subject Terms, can rely on Library of Congress Call Number, Dewey Number, HILCC (Hierarchical Interface to Library of Congress Classification) subject terms, or subject terms in the record with exact match.

**Will it eventually be possible to break FRBR groups in Primo VE, like you already can in Primo, through Primo's normalization rules?**

We have recently released functionality to allow you to adjust the FRBR Keys combinations. Once adjusted the content can be recalculated to fit your configuration.

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

**When will "Display Always" be available?**

With the August 2022 release all new options in the Resource Recommender are available.

**Where can we find the "Display Always" option?**

Part of the Resource Recommender when editing a resource or adding a new one.

**Can the banner include links?**

The banner includes link out option.

**Are the "Linked Open Data Info Cards" currently available or soon to be available? If it's coming soon, is there an expected release date, and are there trainings available regarding this new feature?**

The Linked Data Info Card development was delayed to early 2023 as we needed more time for designing it.

**Will Info Card be developed so that we will be able to enable and configure at the view level? It would be great to not test in production, but rather enable in a development view.**

There is going to be configuration in the view level to enable this feature you will be able to test it on sandbox as well.

**Can you explain the major differences between the Exhibition view and the "always display / recommended resources" options? Both of which are exciting new releases, but I'd like to better understand best use cases for each. Thank you!**

If you are interested in work with us on the Exhibition View please email [nili.natan@clarivate.com](mailto:nili.natan@clarivate.com). The resource recommender options allow you to prompt material on top of search results based specific user search or with the display always cross all searches. This is now available with the August 2022 release notes. As for the Exhibition view - the idea is to expose a narrative or story from curated digital

material and expose it to your users in a new page that can be accessed via Collection Discovery or any other entry that you choose to expose (can even be prompt using resource Recommendation) this is currently on design phases.

**Where can I learn more about Exhibition View, i.e. written description, examples, and road map for release?**

I suggest contacting us. You can email [Nili.natan@clarivate.com](mailto:Nili.natan@clarivate.com) to learn more.

**Can you share any additional info about the item on the Primo VE roadmap "Option to Define Secondary Resource Type in Facets and Pre-filters"?**

You can define additional resource types in VE to filter. For example, you can have the main resource type display as Book and additional one to filter by - Microform - this can be defined based on new rules and conditions. Please read more on this with the August 2022 release notes in Primo VE.

**The problem we have is that the language facet is not working properly (it indicates that our English material results are in Turkish instead of English). The response I got from support says this is a known problem and I should submit a new enhancement request to have it resolved. Why would we have to ask for an enhancement request for a function that does not work? The problem appears to be related to the EBSCO API which we are using in the search profile.**

Sometimes we suggest enhancements as we want to learn more on the need raised in the Idea Exchange, if it answers more customers and we learn from the comments on the different use cases.

**It sounds like you're encouraging libraries to move towards Primo VE. Are you planning on discontinuing Primo BO at some point and only offering Primo VE?**

We encourage Primo Alma customers to look if Primo VE solutions is a match for them and to understand from them if there any barriers or additional functionalities that they would like to see. We have many customers in Primo BO and continue with enhance it. In addition, we say that there is development on the Higher education platform.

**Will the info cards work with URIs in the authority records, or will the URIs need to be in each bibliographic record?**

The info card will be based on the enrichment done today to bib records according to the link to authorities. The URI will be taken based on this link. There is no need to add URI explicitly to the bib.

**We use the Third Iron integration for links already. Is there a way to directly compare which records Quicklinks show up on, and which links are used?**

We support Quicklinks for both ebooks and articles from following list of providers

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/030Primo\\_VE\\_User\\_Interface/Quicklinks\\_Provider\\_List](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/030Primo_VE_User_Interface/Quicklinks_Provider_List) . This list is continuously updated as we are working with additional providers.

**Copied from Attendee Chat/Laura A - In the info card, can we add other data sources (e.g. Getty artist name data)? Is this intended to develop for other entities besides people (institutions, places, topics, related works...)?**

We will start first with external data source such as WIKIDATA and can enhance in the future to other custom data sources.

**You showed an image of a Primo VE page that appeared to be a page that helps individual libraries address bias in subject headings. Is there a similar feature available in Primo BO?**

Both Primo and Primo VE implemented a mechanism to hide offensive subject terms to support Diversity, Equity, and Inclusion (DEI). You can refer to Release notes of Primo in February 2022 and releases notes of VE in 2021 to search for more details - ""Option to Hide Offensive Subject Terms to Support Diversity, Equity, and Inclusion (DEI)"".

**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.

**Copied from Attendee Chat - 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.

**Some implementers of similar features to "Info Card," in other discovery interfaces than Primo have found a need when using Wikidata or other data sources, to block particular terms or data items that otherwise would be coming through. So the development of linked data features should take this into account, right?**

We are starting with Info cards focusing on persons / authors. When we enhance the Info Card to Subjects Terms, we will take this into consideration.

**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>

### **This update was worth the wait!**

Thanks! we hope our users will have a better analytics user experience with this new UI.

### **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.

### **Copied from attendee chat. 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>

**Copied from Attendee Chat. 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.

**Copied from Attendee Chat - 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.

**Copied from Attendee Chat - 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.

**Regarding your point of "understanding data" is there a way that you know of to include definitions of "data points" when building reports?**

We have a "data dictionary" and lots more information about Analytics in Alma which is included in our Knowledge Center:

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/080Analytics](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics). In addition, we are working now together with Alma user representatives, as part of the Analytics Working Group in order to improve the details and information presented on each Subject Area, and making sure there is consistency between Alma and Analytics terms and definitions. Currently we cannot include this type of information within the Oracle Analytics Server, as it is a third-party program, but it is something we have been investigating. We can look into this again once we get enough progress done in the collaborative effort of enriching and improving the Subject Area dictionary in general.

**What's the difference between a working group and a community of practice?**

A working group is a group charged with a particular product's enhancement cycle. They are experts in the functionality of that software and are chiefly responsible for representing the concerns of the product community to Ex Libris. Some products have community voting cycles for their membership (Alma, Primo), while others accept anyone interested (Voyager, SFX). Email the chair for more information about that group's membership process.

Communities of practice tend to be experts in a specific area across products (Analytics, Linked Open Data, Special Collections, Metadata, etc.). Those groups act as subject matter experts. For example, the Analytics group is working on a data dictionary format for all Ex Libris products, Linked Open Data is interested in examining the adoption of linked data in discovery AND bibliographic management products, Special Collections is looking at features that are specific to archives, manuscripts, and special collections for different Ex Libris products. They frequently write in-depth user stories about specific areas of interest to particular communities of users. These groups will frequently have town hall meetings in order to exchange knowledge on what is going on in the field.

Advisory Groups, such as the Diversity, Equity and Inclusiveness in Search, as well as the controlled digital lending advisory groups, will have specific research questions across products to try to advocate for Ex Libris to move in a particular way. With those groups, there is usually survey work to assess where the community is on a particular topic. Where the other two groups are standing groups, the advisory groups tend to be term-limited."