
Primo 2022 Roadmap Highlights

Overview

The Primo roadmap provides a preview of what is planned for 2022 and what is expected to become available in the first and second half of the year. The roadmap is based on community feedback, ideas from the Idea Exchange, NERS voted enhancements, and strategic enhancements that serve longer term goals. This published roadmap focuses on the highlights. We may add other development items over time, which will appear in the release notes.

The information below represents our primary planned developments. They are listed by [category](#) and [timeline](#), followed by [additional details](#) for select items. In some cases, the design is not complete and details will become available closer to the release date.

Highlights by Category

The planned developments are organized by category. For additional details regarding a development, select its link:

User Experience (UI and functions):

- [Advanced Search – Improved Visibility of Search Results](#) (NERS)
- [Resource Recommender Enhancements](#)
- [New Tool for Users to Give the Library Feedback or Report an Issue](#) (NERS)
- [Add New Search Ribbon to Promote Search Scopes and Filters](#)

Search and Ranking:

- [Enhance the Database Search to Include Keyword and Category Searching](#) (NERS)
- [CDI – Ability to Include or Exclude Full Text Matches in CDI](#)
- Improvements to Known Item Searches to Deal Better with Typos and Variations

Linking to Full Text:

- ["View It" Enhancement to Show All Available Links for CDI Records](#) (NERS)
- [CDI – Added Options to Set Preferences for Link-in-Record Linking and Quicklinks](#)

Data Quality and Rights:

- CDI Rights Processing Improvements:
 - Enhanced Performance to Reduce Processing Time to 48 hours
 - Improved Matching Processes (Analysis/PoC)

- [Filter Duplicate Ebook Records from CDI results – Phase Two](#) (NERS)
- Ongoing Improvements in the Merged Record

Discovery of Local and Special Collections:

- [Collection Discovery Enhancements](#)

Other:

- Accessibility – At Ex Libris, we make every effort to ensure that Primo can be used by everyone. It's continually designed and developed to meet Level AA of the W3C Web Content Accessibility Guidelines (WCAG 2.1) and Section 508 of the US Rehabilitation Act for features and functions. See [Primo Accessibility Statement](#)
- Analytics – As Primo evolves and new functionalities are introduced, new actions are being added to [Primo Analytics](#) to help you learn more on your patrons' usage.

Highlights by Timeline

The following table lists the planned developments by timeline. For additional details regarding a development, select its link.

2022 H1	2022 H2
<ul style="list-style-type: none"> • CDI Rights Processing Improvements – Reduce Processing Time to 48 Hours • New Tool for Users to Give the Library Feedback or Report an Issue (NERS) • Enhance the Database Search to Include Keyword and Category Searching (NERS) • Advanced Search – Improved Visibility of Search Results (NERS) • Resource Recommender Enhancements • "View it" Enhancement to Show All Available Links for CDI Records (NERS) • CDI – Ability to Include or Exclude Full Text Matches in CDI 	<ul style="list-style-type: none"> • Filter Duplicate Ebook Records from CDI Results – Phase Two (NERS) • CDI – Added Options to Set Preferences for Link-in-Record Linking and Quicklinks • Collection Discovery Enhancements • Add New Search Ribbon to Promote Search Scopes and Filters • CDI Rights Processing Improvements – Improved Matching Processes (Analysis/PoC)
<p>Ongoing Improvements:</p> <ul style="list-style-type: none"> • Data Quality • Analytics • Accessibility 	

Additional Details

New Tool for Users to Give the Library Feedback or Report an Issue

Originated from NERS #7371 and #7430.

What's New?	Highlights	Impact	Status
<p>Introduce a new tool for users, allowing them to easily give the library feedback or report on any issue from anywhere in the interface.</p>	<ul style="list-style-type: none">• Users will be able to report an issue from any page in the Primo interface filling the following:<ul style="list-style-type: none">◦ Select a subject for example Broken Link, Search Issues.◦ Description (optional)◦ User's email address (optional)• Library will configure the email address to monitor and track the feedback sent by the users• Library can define the common categories for user selection for example broken link• Feedback will be sent to the library including user's input and additional context to help diagnosing the issue if approved by the user.	<p>Provide the library more ways to improve user experience and workflow.</p>	<p>Released in May 2022.</p>

Enhance the Database Search to Include Keyword and Categories Searching

Originated from NERS #7199.

What's New?	Highlights	Impact	Status
<p>Enhance Database Search capabilities by allowing users to search by keyword and category (not just title).</p>	<ul style="list-style-type: none">• Expand Database Search to allow searching within all search fields (such as subject and description), not just the title.• Expand Database Search to allow searching by DB category, which is based on the DB category definitions in the source and related labels and translations defined in the DB Search code table.	<p>Broader search capabilities.</p>	<p>Released in February 2022.</p>

Advanced Search - Improved Visibility of Search Results

Originated from NERS #7265.

What's New?	Highlights	Impact	Status
<p>Make the search results more visible to users by collapsing the Advanced Search form.</p>	<ul style="list-style-type: none">• Allow users to expand or collapse the Search Criteria form on the Advanced Search page.	<p>Experience and workflow.</p>	<p>Released in May 2022.</p>

What's New?	Highlights	Impact	Status
	<ul style="list-style-type: none"> Automatically collapse the Advanced Search form after entering a search, displaying only the query summary and the search results. Automatically collapse the Advanced Search form in the search results after selecting a hypertext link in the Details section of a record's full display. 		

Resource Recommender Enhancements

What's New?	Highlights	Impact	Status
<p>Use new options in the Resource Recommender to raise awareness about a topic, or an event, by increasing visibility on top of search results after a specific user search or across all searches.</p>	<ul style="list-style-type: none"> Persistent Resource Recommender: <ul style="list-style-type: none"> A new Display Always check box in the Resource Recommendation Configuration allows you to specify resources that will always appear instead of when a specific tag is specified by the user. Introduce new Banner resource type: <ul style="list-style-type: none"> Library can define a new resource recommender type as a Banner and use it to market, raise awareness or share with their users any information on top of their results. One banner spans the top of search results and other resource recommendations. 	<p>Provide more ways to share information with patrons and enrich the discovery experience.</p>	<p>Display Always - Released in May 2022.</p> <p>Banner resource - Released in August 2022.</p>

"View It" Enhancement to Show All Available Links for CDI Records

Originated from NERS #7311.

What's New?	Highlights	Impact	Status
<p>For CDI records with more than one link option (link in record to subscription content, link resolver link, and link in record to open access content), all eligible links will be displayed in the order of priority to maintain the best link on top.</p>	<ul style="list-style-type: none"> Library can enable the option to show all available links for CDI records in View It If enabled, users can select Show More to see all links in the 	<p>Provide more linking options to the full text.</p>	<p>Released in May 2022.</p>

What's New?	Highlights	Impact	Status
	<p>following order:</p> <ul style="list-style-type: none"> ◦ Link in record to subscription content ◦ Link resolver links (and other OpenURL related services) ◦ Link in record to open access content 		

CDI - Ability to Include or Exclude Full Text Matches in CDI

What's New?	Highlights	Impact	Status
<p>Allow users to indicate whether their searches should include or exclude records when search terms are found in the indexed full text of the document.</p>	<p>Library can choose whether the default search should expand to the full text of the documents.</p> <p>If the search does not expand to full text by default, users have the option to expand the search to the full text by selecting the new Search in Full Text toggle under the Tweak My Results section for scopes.</p>	<p>More targeted search experience, and the reduction of the long tail of search results.</p>	<p>Released in May 2022.</p>

Filter Duplicate Ebook Records from CDI Results - Phase Two

Originated from NERS #6702.

What's New?	Highlights	Impact	Status
<p>Reduce duplicates in the results list by eliminating CDI book records from the search results, if the book is already available from the local index. Book chapters will not be affected.</p>	<p>In phase 1, we added the option to filter out all book records from CDI and return book records from your local index only.</p> <p>In phase 2 we offer more granularity by allowing the combination of "unique" book records from CDI and local book records, reducing duplicates from CDI as much as possible.</p>	<p>Significantly reduce duplicate ebook records from searches.</p>	<p>Released in August 2022.</p>

CDI - Added Options to Set Preferences for Link-in-Record Linking and Quicklinks

What's New?	Highlights	Impact	Status
Add configuration to set linking preferences.	Include options for libraries to set their own preferences for providers and platforms, for cases where more than one eligible link is available, and provide some of the configuration options currently available on the link resolver for link in record collections.	More library control over linking configurations and preferences.	Planned for 2022 H2.

Collection Discovery Enhancements

Originated from NERS #7402.

What's New?	Highlights	Impact	Status
Make Collection Discovery more granular (specific for libraries/view).	<ul style="list-style-type: none"> Option to define Collection Discovery per libraries/view. Make the Collection Path displayed in Full Record sensitive to mapping collection hierarchy defined for the current view. 	Better ability to manage and expose what is most relevant.	Released in August 2022.

Add New Search Ribbon to Promote Search Scopes and Filters

What's New?	Highlights	Impact	Status
Users can easily restrict their search by clicking on pre-defined scopes and filters.	<ul style="list-style-type: none"> Library can define common search criteria to help users better find what is most relevant for them on pre-defined sets of records. For example, define images, theses, or any combination of other search criteria. The new Search Ribbon displays under the search bar. 	Better ability to manage and expose what is most relevant.	Planned for 2022 H2.