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# Primo VE 2022 Roadmap Highlights

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## Overview

The Primo VE 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.

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## 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 – Collapsing the Search Criteria Form](#) (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](#)
- [Linked Data – Info Card](#)

### 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](#)
- [Launch of Specialized Search Scopes for CDI \(Primo VE First\)](#)
- [Support New Type of “Equals” in the Advanced Search](#) (NERS)
- Improvements to Known Item Searches to Deal Better with Typos and Variations
- Search and Ranking Ongoing – Ongoing Enhancements

### 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](#)
- [POC - New Exhibition View for Digital Collections](#)

## 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.

## Additional Enhancements for Primo VE:

- Allow Normalizing Metadata Fields for Search and Display (DC) – **Released in August 2022.**
- Enhanced Get It to Support Library Level List – **Released in April 2022.**
- Allow Restricted Search for Search Webhook – **Released in April 2022.**
- Customize RIS Mapping (Idea Exchange) – **Released in April 2022.**
- Related Titles – Sort by Title and Relation Type (Idea Exchange) – **Released in March 2022.**
- Option to Define Secondary Resource Type in Facets and Pre-filters (Idea Exchange) – **Released in August 2022.**
- Analytics – Add Discovery Index to Analytics
- Arabic Language Support

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## 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"><li>• CDI Rights Processing Improvements – Reduce Processing Time to 48 Hours</li></ul>	<ul style="list-style-type: none"><li>• <a href="#">Filter Duplicate Ebook Records from CDI Results – Phase Two</a> (NERS)</li></ul>

2022 H1	2022 H2
<ul style="list-style-type: none"> <li>• <a href="#">New Tool for Users to Give the Library Feedback or Report an Issue</a> (NERS)</li> <li>• <a href="#">Enhance the Database Search to Include Keyword and Category Searching</a> (NERS)</li> <li>• <a href="#">Advanced Search – Collapsing the Search Criteria Form</a> (NERS)</li> <li>• <a href="#">"View it" Enhancement to Show All Available Links for CDI Records</a> (NERS)</li> <li>• <a href="#">CDI – Ability to Include or Exclude Full Text Matches in CDI</a></li> <li>• <a href="#">Launch of Specialized Search Scopes for CDI (Primo VE First)</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">CDI – Added Options to Set Preferences for Link-in-Record Linking and Quicklinks</a></li> <li>• <a href="#">Collection Discovery Enhancements</a></li> <li>• <a href="#">Add New Search Ribbon to Promote Search Scopes and Filters</a></li> <li>• <a href="#">Support New Type "Equals" in the Advanced Search</a> (NERS)</li> <li>• <a href="#">Linked Data – Info Card</a></li> <li>• <a href="#">POC – New Exhibition View for Digital Collections</a></li> <li>• <a href="#">Resource Recommender Enhancements</a></li> <li>• CDI Rights Processing Improvements – Improved Matching Processes (Analysis/PoC)</li> </ul>
<p>Ongoing Improvements:</p> <ul style="list-style-type: none"> <li>• Data Quality</li> <li>• Analytics</li> <li>• Accessibility</li> </ul>	

## 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"> <li>• Users will be able to report an issue from any page in the Primo interface filling the following: <ul style="list-style-type: none"> <li>◦ Select a subject for example Broken Link, Search Issues.</li> <li>◦ Description (optional)</li> <li>◦ User's email address (optional)</li> </ul> </li> <li>• Library will configure the email address to monitor and track the feedback sent by the users</li> <li>• Library can define the common categories for user selection for example broken link</li> <li>• Feedback will be sent to the library including</li> </ul>	<p>Provide the library more ways to improve user experience and workflow.</p>	<p><b>Released in May 2022.</b></p>

What's New?	Highlights	Impact	Status
	<ul style="list-style-type: none"> <li>user's input and additional context to help diagnosing the issue if approved by the user.</li> </ul>		

## Enhance the Database Search to Include Keyword and Categories Searching

Originated from NERS #7199.

What's New?	Highlights	Impact	Status
Enhance Database Search capabilities by allowing users to search by keyword and category (not just title).	<ul style="list-style-type: none"> <li>Expand Database Search to allow searching within all search fields (such as subject and description), not just the title.</li> <li>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.</li> </ul>	Broader search capabilities.	Released in March 2022.

## Advanced Search - Collapsing the Search Criteria Form

Originated from NERS #7265.

What's New?	Highlights	Impact	Status
Make the search results more visible to users by collapsing the Advanced Search form.	<ul style="list-style-type: none"> <li>Allow users to expand or collapse the Search Criteria form on the Advanced Search page.</li> <li>Automatically collapse the Advanced Search form after entering a search, displaying only the query summary and the search results.</li> <li>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.</li> </ul>	Experience and workflow.	Released in March 2022.

## Resource Recommender Enhancements

What's New?	Highlights	Impact	Status
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.	<ul style="list-style-type: none"> <li>Introduce new Banner type: <ul style="list-style-type: none"> <li>Library can define a new resource recommender type as a Banner and use it to market, raise awareness or share with</li> </ul> </li> </ul>	Provide more ways to share information with patrons and enrich the discovery experience.	Released in August 2022.

What's New?	Highlights	Impact	Status
	<p>their users any information on top of their results.</p> <ul style="list-style-type: none"> <li>◦ One banner spans the top of search results and other resource recommendations.</li> <li>• Persistent Resource Recommender: <ul style="list-style-type: none"> <li>◦ A new <b>Display Always</b> 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.</li> </ul> </li> </ul>		

## "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"> <li>• Library can enable the option to show all available links for CDI records in View It</li> <li>• If enabled, users can select <b>Show More</b> to see all links in the following order: <ul style="list-style-type: none"> <li>◦ Link in record to subscription content</li> <li>◦ Link resolver links (and other OpenURL related services)</li> <li>◦ Link in record to open access content</li> </ul> </li> </ul>	<p>Provide more linking options to the full text.</p>	<p>Released in April 2022.</p>

## CDI – Ability to Include or Exclude Full Text Matches in CDI

What's New?	Highlights	Impact	Status
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>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 <b>Search in Full Text</b> toggle under the Tweak My Results section for scopes.</p>	More targeted search experience, and the reduction of the long tail of search results.	<b>Released in May 2022.</b>

The feature will be released in two stages, first we will release the option to exclude full text from the default search for libraries to switch on (targeted for the May release). A few months later (we target the August release), we will change the default to always exclude the full text.

## Launch of Specialized Search Scopes for CDI (Primo VE First)

What's New?	Highlights	Impact	Status
Provide more flexibility to support different search preferences by defining search criteria for CDI scopes.	Allow the creation of views with search scopes for CDI that are restricted to certain disciplines or resource types or a combination of both.	More flexibility to create specific search scopes for different user groups.	<b>Released in March 2022.</b>

## Filter Duplicate Ebook Records from CDI Results - Phase Two

Originated from NERS #6702.

What's New?	Highlights	Impact	Status
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>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>	Significantly reduce duplicate ebook records from searches.	<b>Released in August 2022.</b>

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

What's New?	Highlights	Impact	Status
Add	Include options for libraries to set their own preferences for providers and platforms, for	More library control	Planned

What's New?	Highlights	Impact	Status
configuration to set linking preferences.	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.	over linking configurations and preferences.	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"> <li>Option to define Collection Discovery per libraries/view.</li> <li>Make the Collection Path displayed in Full Record sensitive to mapping collection hierarchy defined for the current view.</li> </ul>	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.	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.

## Support New Exact Type of "Equals" in the Advanced Search

Originated from NERS #6693.

What's New?	Highlights	Impact	Status
Introduce "equals" as a new operator in Advanced Search for specific fields.	Adding a more exact search option to the subject and author filed search in the Advanced search to allow users to restrict results to include exact and only query terms for which users search.	More search capabilities to improve discovery experience.	Planned for 2022 H2.

## Linked Data - Info Card

What's New?	Highlights	Impact	Status
Introduce new Info Card based on Linked Data URI.	<ul style="list-style-type: none"> <li>Utilize Linked Data URIs to present new Information Cards in a Record's Full Display.</li> <li>Enrich the display with more information on linked entities and related resources made available thanks to the URI .</li> </ul>	Enrich the discovery experience.	Planned for 2022 H2.

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## Exhibition View for Digital Collections

What's New?	Highlights	Impact	Status
Introduce a new Exhibition View to show users digital collections with a narrative.	Customizable display of digital collections, including timelines, narratives, and more.	Provide more ways to expose library collections and enrich discovery experience.	Planned for 2022 H2.