
Primo VE 2023 Roadmap Highlights

Overview

The Primo/Primo VE roadmap provides a preview of what is planned for 2023 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 development. Roadmap items are listed by [category](#) and [timeline](#), followed by [additional details](#) when available. If feature development and design is not complete, details will be available closer to release.

As we work closely with the Primo working group while designing some enhancements, we'll deliver more relevant information to the community by sharing mockups, workflows, and additional details.

Note

The content on this page is informational and may be subject to change without prior notice at the sole discretion of Ex Libris.

Related Information

- 2023 Primo Roadmap Highlights (February 15, 2023) – [PDF](#)
 - EMEA/APAC session – [YouTube](#), [Vidyard](#)
 - AMERICAS/EMEA session – [YouTube](#), [Vidyard](#)
- What's New with Primo (January 25, 2023) – [YouTube](#), [WebEx](#), [PDF](#)

Highlights by Category

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

User Experience (UI and functions):

- [Improve your Search Results using new options in the Advanced Search](#)
- [Improved pagination experience](#)
- [Support Search in My Favorites](#)
- [Add Resource Types Filters under the Search Bar](#)
- [Improving the user's session timeout experience](#)

- [Long Term Digital Loan – Support Patron Workflow](#)
- [My Library Card Improvements](#)
- [Improve Search Experience when No Results Found](#)

Search and Ranking:

- Citation search enhancements – Use of an AI-based tool to identify citations and translate into known items searches – (H1 2023)
- CDI – Support Melingo the Hebrew Search Plugin in CDI – (H2 2023)
- Ongoing Enhancements

CDI Data Quality and Rights:

- Addition of a secondary resource type, e.g. to identify retractions and withdrawn items but also to flag review articles – this may only become visible to users in 2024
- CDI Rights Processing Improvements
 - Enhanced performance to reduce processing time from currently 30 hours on average, to 24-48 hours by end of 2024
- Ongoing improvements to data quality in CDI, incl.:
 - Improvements to the publication date and language fields to increase consistency (H1 2023)
 - Better identify of book reviews (H2 2023)
 - Connect author names to ORCIDiDs, when provided, and normalize the author name (H2 2023)
 - Improve OA-handling, with the addition of Unpaywall as an indexed collection, to allow filtering by availability and open access indication (H2 2023)
 - Identify low-quality data sources to remove from the merged record (H2 2023)
 - Split subject and keyword fields, and normalizing subjects, based on controlled vocabularies (anticipated to be visible to users in 2024)
 - Additions to item relationships to display in the related items feature – (H2 2023)

Note

Some of the data quality projects will only be visible over time, some may be released for users in 2024.

Library Empowerment – New Tools and Configurations to Expose Library Resources

- [Enhancing Resource Type Configuration](#)
- [More Configuration options in Primo VE](#)

Other Major Areas for Enhancements:

- Accessibility: 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:
 - [Collection Discovery Usage](#)
 - Support Analytics API in Primo VE
 - Ongoing Analytics - As Primo evolves and new functionalities are introduced, new actions are being added to Primo Analytics to help you learn more about your patrons' usage.

Highlights by Timeline

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




2023 H1	2023 H2
<ul style="list-style-type: none"> • Improve your Search Results using new options in the Advanced Search • Improved pagination experience • Support Search in My Favorites • Add Resource Types Filters under the Search Bar • Improving the user's session timeout experience • Enhancing Resource Type Configuration • My Library Card Improvements 	<ul style="list-style-type: none"> • Long Term Digital Loan – Support Patron Workflow • Collection Discovery Usage • Improve Search Experience when No Results Found • Additional Configuration Options in Primo VE
<p>Ongoing Improvements:</p> <ul style="list-style-type: none"> • Search and Ranking • CDI Data Quality and Rights • Analytics • Accessibility 	

Additional Details

Improve Your Search Results Using New Options in the Advanced Search



NERS Requests

What's New?	Highlights	Impact	Status
<p>Add new capabilities to Advanced Search:</p> <ul style="list-style-type: none"> Support "Starts With" Option for Call Number Searches Add Barcode Search Add "Equals exact phrase" to support the exact and only for Title, Creator and Subject fields 	<p>Call Number Searches:</p> <ul style="list-style-type: none"> Allow users to use "Starts with" operator in the Advanced Search for holdings call numbers. This operator was previously supported only for the Title field. This option can also be defined for the pre-filters used in Simple Search.  <p>NERS Request #7986</p>	<p>Provide more search capabilities to improve discovery experience.</p>	<p>Released in February 2023.</p>
	<p>Barcode Search:</p> <ul style="list-style-type: none"> Add a new "Barcode Search" section in the Advanced Search to allow users search by item's barcode and locate specific physical items. Upon match, under the Barcode Search Bar, users will view the associated record in a Full Display format. <p>Target: Alma customers since Primo will use Alma's API to fetch items by barcode.</p>  <p>NERS Request #7859</p>		<p>Released in February 2023.</p>
	<p>New operator "Equals exact phrase"</p> <ul style="list-style-type: none"> Allow users to use a new "Equals exact phrase" operator in the Advanced Search for Title, Creator and Subject field. The system will retrieve results matched only the users' specific query terms on the specified field. The "Equals exact phrase" can be also used for the same fields when clicking on Hypertext Linking from the Full Record 's details section. for example library can define that the Hypertext link of the author field perform "Equals exact phrase" in the Advanced Search so users can view the results matched to this author only. <p>Scope: support "Equals exact phrase" searches only for CDI searches and Primo VE.</p>  <p>NERS Request #6693</p>		<p>Released in May 2023.</p>

Improved Pagination Experience



NERS Request #7700

What's New?	Highlights	Impact	Status
Allow users to easily define number of results per page and improve their pagination experience	<p>Improving the selection of number results per page:</p> <ul style="list-style-type: none"> Allow the users to select from the top of the page the number of results per page. Keep the selected number of results per page between sessions for signed-in users. Reduce slide-in animation when scrolling the brief results to view more records. 	Provide better user experience and workflow.	Released in February 2023.
	<p>Improve pagination in Browse Search</p> <ul style="list-style-type: none"> Optimize the Browse calls to help users view all related results faster. <hr/> <p>Note</p> <p>This optimization may require some UX changes when viewing results, more details will follow closer to the release timeline).</p> <hr/>		

Improving the User's Session Timeout Experience



NERS Request #7809

What's New?	Highlights	Impact	Status
Introduce new settings to notify the users upon session timeout, allowing them also to extend future sessions automatically.	<ul style="list-style-type: none"> Inform the users before their session is about to timeout, providing them option to extend it. Add a new toggle in the Personal Settings: Automatically extend my session. Upon session time out, guide the users with new settings to extend future sessions automatically. 	Provide better user experience and workflow.	Released in May 2023.

Support Search in My Favorites



Idea Exchange

What's New?	Highlights	Impact	Status
Help users to navigate and better use their Saved Records.	<ul style="list-style-type: none"> Add a new search bar to the My Favorites > Saved Record section, allowing users to easily search for their records of interest. Support only basic search on the Saved Records' Title, Author, and users' labels fields. 	Provide better user experience and workflow.	Released in February 2023.

Add Resource Types Filters under the Search Bar

What's New?	Highlights	Impact	Status
Introduce new Resource Types Filters under the Search Bar allowing users to easily narrow their search results by selecting one of these main resource types.	<ul style="list-style-type: none"> Library can define the commonly and use Resource Types to display under the Search Bar in the Simple Search Interface. Users can easily select one of these main resource types to filter and improve their search results. 	More search capabilities to improve the discovery experience.	Released in May 2023.

Enhancing Resource Type Configuration



NERS Request #7790

What's New?	Highlights	Impact	Status
Enhance the Resource Type Configuration to support system resource types.	Library can specify rules and conditions to define not only local resource types but also system resource types. Upon indexing, Primo VE will prioritize first matches based on custom rules to determine the record's resource type.	Better manage and expose what is most relevant.	Released in May 2023.


Long Term Digital Loan – Support Patron Workflow

What's New?	Highlights	Impact	Status
Long Term Digital Loan - Support patron workflow when lending a digital copy of a physical resource in a "lend like print" manner.	Allow patrons to submit and track requests also for digitized resources available via Long Term Digital Lending .	Provide better user experience and workflow.	Released in May 2023.

My Library Card Improvements

What's New?	Highlights	Impact	Status
<p>Enhance the My Library Card to include:</p> <ul style="list-style-type: none"> Option to filter Fines by Status. Option to opt in/out from receiving library notifications. 	<p>Allow users to view their fines filtered by Fine Status (Active/Transferred/Closed) (H1 2023)</p> <p>Enable users to opt in/out from receiving library notifications, for example Activity Report (H2 2023).</p>	<p>Better manage and expose what is most relevant.</p>	<p>Released in May 2023.</p> <p>Released in August 2023.</p>

Additional Configuration Options in Primo VE

What's New?	Highlights	Impact	Status
<p>Provide the library additional options to better manage and expose their resources.</p>	<ul style="list-style-type: none"> Enhancing DEDUP & FRBR Definitions to include Keys based on local fields. Support relevance sorting within FRBR group. Define additional availability statuses when using Discovery Import Profile. Display the Item Policy in the Get It. This is applicable to institutions that use this item-level attribute as a persistent attribute. <p> Idea Exchange</p>	<p>Better manage and expose what is most relevant.</p>	<p>Released in November 2023.</p>

Collection Discovery Usage



NERS Request #7186

What's New?	Highlights	Impact	Status
<p>Enhance Primo Analytics to reflect usage per collection.</p>	<ul style="list-style-type: none"> Track usage per collection in Collection Discovery. Library will be able to create reports to answer questions on their special collections for example: which collections are the most viewed / pinned ... 	<p>Better manage and expose what is most relevant.</p>	<p>Released in August 2023.</p>

Improve Search Experience when No Results Found



NERS Request #6729

What's New?	Highlights	Impact	Status
Improve user experience when Auto Complete suggests materials beyond library subscription.	<ul style="list-style-type: none">• Reduce the number of cases when users may reach zero results page.	Provide better user experience and workflow.	Released in November 2023.