
Primo 2024 Roadmap Highlights

Overview

The Primo roadmap provides a preview of what is planned for 2024 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

- 2024 Primo and Primo VE Roadmap Highlights (February 2024) – [YouTube](#), [PDF](#)
- What's New with Primo (January 24, 2024) – [YouTube](#), [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):

- [Support bulk export of search results](#)

Search and Ranking:

- Ongoing improvements

Library Empowerment – New Tools and Configurations to Expose Library Resources:

- [Allow HTML coding in labels, public notes and collection description](#)

CDI Data Quality and Rights:

- [CDI Subject Headings and Keywords normalization refinements](#)
- [Support special linking parameters for select providers](#)
- [Prevent search results expansion using exact phrase](#)
- [Improve Book Review identification](#)
- [Improve handling of In Press articles](#)

Accessibility:

- During the year, we plan to have an audit and fill out a VPAT to be in compliance with the new criteria of WCAG 2.1 Level A and AA.
- Ongoing 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. For more information, see Primo Accessibility Statement. Throughout the year, we fix accessibility items based on external audit results and customer feedback.

Analytics:

- Ongoing Analytics – As Primo evolves and new functionalities are introduced, new actions will be 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.

2024 H1	2024 H2
<ul style="list-style-type: none"> • CDI Subject Headings and Keywords normalization refinements • Support special linking parameters for select providers 	<ul style="list-style-type: none"> • Support bulk export of search results • Allow HTML coding in labels, public notes and collection description • Prevent search results expansion using exact phrase • Improve Book Review identification • Improve handling of In Press articles

Additional Details

Support Bulk Export of Search Results



NERS 2023 Request #8126

What's New?	Highlights	Impact
Ability to export a large number (thousands) of search results.	<ul style="list-style-type: none"> Introduce a new option in the user interface to support the bulk export of search results. Patrons can select to export search results in CSV/ Excel, RIS or BIBTEX formats. 	Users can save and maintain their literature review outside the context of Primo.

Allow HTML Coding in Labels, Public Notes and Collection Description



NERS Request #8134

What's New?	Highlights	Impact
Support formatting and link out to other pages using HTML coding for labels and public notes.	<ul style="list-style-type: none"> Specific labels and public notes will now be able to display HTML coding for styling and hyperlinks. Once defined, patrons will see labels, public notes and collection description fields formatted with the HTML tags. 	Provide better user experience and workflow.

Prevent Search Results Expansion Using Exact Phrase



NERS Request #8210

What's New?	Highlights	Impact
Limit exact searches to not expand the query using linguistic capabilities.	<ul style="list-style-type: none"> When a users' searches containing quotation marks indicating an exact phrase, Primo will return results that exactly match the terms entered and will not expand the query to include results with search string query variations or stemming. 	Better search capabilities to improve the discovery experience.

CDI Subject Headings and Keywords Normalization Refinements

What's New?	Highlights	Impact
Deduplicated and normalized CDI subject headings based on LCSH and MeSH controlled vocabularies.	<ul style="list-style-type: none"> CDI subjects are now mapped to established LCSH and MeSH subject headings for search, display, and facets. Subjects that are not normalized are considered 	Eliminates user confusion leveraging familiar vocabulary schemas.

What's New?	Highlights	Impact
	<p>keywords and may still be searched and displayed in Primo.</p> <ul style="list-style-type: none"> • Further refining will be done in 2024 based on customer feedback. 	

Support Special Linking Parameters for Select Providers

What's New?	Highlights	Impact
<p>CDI Quicklinks and Link in record links will use the customer linking parameters specified in Alma for each library.</p>	<ul style="list-style-type: none"> • Customer-specific linking parameters will be published from Alma to CDI, eliminating the need for additional set-up or help from Support. • Gale and ProQuest are the first providers impacted. For additional information, see Customer Linking Parameters in CDI Links. 	<p>One-step configuration.</p>

Improve Book Review Identification

What's New?	Highlights	Impact
<p>Book Reviews that were previously categorized as Articles by the match & merge process will now reflect their correct Content Type.</p>	<ul style="list-style-type: none"> • The logic for the Match & merge process will be refined to better distinguish Book Reviews from Articles. • Facets and result ranking will improve the user experience. 	<p>Easier, more accurate identification of desired resources.</p>

Improve Handling of In Press Articles



NERS Request #8156

What's New?	Highlights	Impact
<p>In Press articles that do not have sufficient metadata for linking (e.g. volume and issue) will be handled with special logic in Primo.</p>	<ul style="list-style-type: none"> • It will be possible to suppress availability for articles based on a combination of provider and absent metadata fields. 	<p>Prevent broken links to content and avoid user frustration.</p>

What's New?	Highlights	Impact
	<ul style="list-style-type: none"><li data-bbox="734 216 1221 279">• The rules will be tailored to individual providers & collections as necessary.	