
Primo VE 2024 Roadmap Highlights

Overview

The Primo VE 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 VE 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.

The Next Discovery Experience

In addition, we are eager to provide you with a sneak peek into our ongoing extensive efforts toward shaping the future experience for our customers. In mid-2023 we announced the Next Discovery Experience vision, some of which will be released in 2024. The Next Discovery Experience (NDE) includes the following areas: User Interface, Linked Data, Engagement Analytics, and Discovery Research Assistant.

User Interface

By focusing on simplicity, visual appeal, and incorporating customer input, the redesigned interface will make it easier for users to access the information they need. Our goal is to improve the user experience and workflow by creating a more intuitive and visually appealing interface to make navigation easier, incorporating modern design principles and user feedback to optimize content discovery, ensuring users can quickly and efficiently find relevant information, and providing a more engaging platform that enables productive interactions. We are working closely with the Primo VE UX Focus Group and plan to expose initial pages for testing in 2024 and deliver its general release in mid 2025. For more information, see [Primo Next Discovery Experience User Interface](#).

Linked Data

Linked Data offers connectivity across library resources, and formats, including interoperability with external sources, to connect resources visually between people, subjects, places, and more. The first phase is planned in 2024 within the current UI.

Engagement Analytics

We are partnering with Mixpanel to launch a new platform for understanding how users behave within the user interface. This collaboration will help make data-driven decisions and improve user engagement and retention by using robust Mixpanel capabilities such as understanding the user journey, identify pain points, drop-off points, locate the access points to Primo VE and more. We will be working with early adopters throughout 2024.

Discovery Research Assistant, Powered by Generative AI

We are working on new discovery functionality that incorporates generative AI to help users find content and answers faster and more easily. The Research Assistant will enable natural language search and provide concise answers drawn from indexed CDI materials. Our Research Assistant will cite the sources from which it pulls information and display the full list of relevant results, enhancing transparency. In future versions, we will introduce more functions such as commentaries and aboutness features to improve glanceability. The first version of our research assistant is planned for end of 2024.

Related Information

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

- [Linked Data – Person Entity](#)
- [Support bulk export of search results](#)
- [Make local authority records discoverable](#)
- [Add ability to configure the display at the item and location levels in Get It](#)
- [Allow CDI Records and External Resources in Alma Collections](#)

Search and Ranking:

- [Support indexing of Marc field 689 \(subject\) for German MARC](#)
- [Support Melingo Search Plugin for Arabic](#)
- Ongoing improvements

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

- [Showcase carousel tool](#)
- [Split configuration for hypertext linking using equals exact phrase search](#)
- [Allow HTML coding in labels, public notes and collection description](#)

- [Add 'exclude CDI resource types' option to CDI scope](#)

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 VE 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 VE Accessibility Statement. Throughout the year, we fix accessibility items based on external audit results and customer feedback.

Analytics:

- [Primo VE User Engagement Analytics](#)
- Ongoing Analytics – As Primo VE evolves and new functionalities are introduced, new actions will be added to Primo Analytics to help you learn more about your patrons' usage.

Consortia:

- [Consortia management inheritance](#)
- [Give patron consent message when registering information at another institution](#)

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"> • Linked Data – Person Entity • Showcase carousel tool • Make local authority records discoverable • Support indexing of Marc field 689 (subject) for German MARC • Split configuration for hypertext linking using equals exact phrase search 	<ul style="list-style-type: none"> • Support bulk export of search results • Consortia management inheritance • Allow HTML coding in labels, public notes and collection description • Add ability to configure the display at the item and location levels in Get It

2024 H1	2024 H2
<ul style="list-style-type: none"> • Support Melingo Search Plugin for Arabic • Add 'exclude CDI resource types' option to CDI scope • CDI Subject Headings and Keywords normalization refinements • Support special linking parameters for select providers • Give patron consent message when registering information at another institution 	<ul style="list-style-type: none"> • Prevent search results expansion using exact phrase • Allow CDI Records and External Resources in Alma Collections • Discovery Research Assistant, powered by generative AI • Primo VE User Engagement Analytics • Improve Book Review identification • Improve handling of In Press articles

Additional Details

Linked Data – Person Entity

What's New?	Highlights	Impact
<p>New Person Entity will be added in the Discovery in 3 areas: Search auto-complete, Info Card in full display and a new Person page.</p>	<ul style="list-style-type: none"> • New Person entity based on LCNAMES and Wikidata. • New entry type of Person in the auto-complete. • New Info Card in records full display for authors and subjects. • New Person page to present person info and relationships. 	<ul style="list-style-type: none"> • Better exploration and recommendation. • Richer discovery experience.

Showcase Carousel Tool



Idea Exchange

What's New?	Highlights	Impact
<p>Showcase and display a visual carousel of records tailored to the library's specifications.</p>	<p>Promote unique or new content, encouraging exploration and traffic to the library discovery system from sites such as University and faculty pages</p> <ul style="list-style-type: none"> • Library can select records to be included in the showcase using queries and add the code snippet to 	<p>Better manage and expose what is most relevant helping libraries meet the users where they are.</p>

What's New?	Highlights	Impact
	<p>relevant sites</p> <ul style="list-style-type: none"> Patrons will see the new showcase in the relevant pages/sites 	

Make Local Authority Records Discoverable

What's New?	Highlights	Impact
Expose Authorities allowing search and display in a new dedicated Primo VE page.	<ul style="list-style-type: none"> A new patron facing interface for searching locally managed authorities. Allow users to search across authorities terms and link out to bibliographic records connected to the term. 	Better exposure of relevant library information.

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 VE.

Patron Consent Message when Registering at Another Institution

What's New?	Highlights	Impact
Display consent message to inform patrons that their personal information will be shared with the institution as part of registration for direct requests.	<ul style="list-style-type: none"> When remote registration is enabled in a fulfillment network, the Register button appears in Get It to allow users from an institution to register to get access to services from another institution. Patrons that will click 'Register' will receive a consent message. 	More informative patron workflows, better transparency, and greater sense of trust.

Support Indexing of Marc 689 Field (Subject) for German MARC

What's New?	Highlights	Impact
Support German MARC cataloging with the 689 subject field.	<ul style="list-style-type: none">• Map 689 field to the standard MARC 6XX fields.• Patron will be able to view and search on subjects cataloged in 689.	Better regional support for German cataloging libraries.

Split Configuration for Hypertext Linking Using Equals Exact Phrase Search

What's New?	Highlights	Impact
Offer multiple configuration options when using the "equals/exact" search method for hypertext linking.	<ul style="list-style-type: none">• The admin will be able to define for which fields (Author, Subject) clicking on hypertext linking will trigger 'Equals exact phrase' search.• Patron will get more accurate search method based on the hypertext field.	More control over the search method used when searching for records with the same author/subject.

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.

Add Ability to Configure the Display at the Item and Location Levels in Get It



NERS Request #8141

What's New?	Highlights	Impact
Offer multiple configuration options to the behavior in cases of one location in Get It.	<ul style="list-style-type: none"> • Currently, if there are items in only one location, the first display after opening the Getit is at the item level. • Administrators will be able to define whether users should see the items within the location or always display the holdings/location list first. 	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 VE 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.

Allow CDI Records and External Resources in Alma Collections



Idea Exchange

What's New?	Highlights	Impact
Expand Collection Discovery beyond Alma bib records.	<ul style="list-style-type: none"> • Allow Collection Manager to add specific selected CDI or external records to be displayed as part of the Collection Discovery. • Patron will explore collections that will contain both local and external resources. 	Better manage and expose what is most relevant.

Add Exclude CDI Resource Types Option to CDI Scopes

What's New?	Highlights	Impact
Allow excluding selected CDI resource types in a Search Profile.	<ul style="list-style-type: none"> • In 2022 we added the ability to define a limited CDI search profiles to specific resource types (such as videos or theses) and/or disciplines (such as visual arts). 	Better manage and expose what is most relevant.

What's New?	Highlights	Impact
	<ul style="list-style-type: none"> This enhancement is to expand this capability further and allow the library to create a search profile that completely excludes specific CDI resource types. The library may define multiple CDI search profiles that are targeted to different resources. 	

Consortia Management Inheritance

What's New?	Highlights	Impact
For consortia, the central office will have more centralized operational abilities, allowing member institutions to inherit setup and configuration.	<ul style="list-style-type: none"> The central office will be able to define more functionality configurations in the Network Zone and apply them to selected members. 	The central office will be able to work more efficiently, reducing time spent applying central policies.

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 keywords and may still be searched and displayed in Primo VE. Further refining will be done in 2024 based on customer feedback. 	Eliminates user confusion leveraging familiar vocabulary schemas.

Support Special Linking Parameters for Select Providers

What's New?	Highlights	Impact
CDI Quicklinks and Link in record links will use the customer linking parameters specified in Alma for each library.	<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 	One-step configuration.

What's New?	Highlights	Impact
	additional information, see Customer Linking Parameters in CDI Links .	

Improve Book Review Identification

What's New?	Highlights	Impact
Book Reviews that were previously categorized as Articles by the match & merge process will now reflect their correct Content Type.	<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. 	Easier, more accurate identification of desired resources.

Improve Handling of In Press Articles



NERS Request #8156

What's New?	Highlights	Impact
In Press articles that do not have sufficient metadata for linking (e.g. volume and issue) will be handled with special logic in Primo VE.	<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. The rules will be tailored to individual providers & collections as necessary. 	Prevent broken links to content and avoid user frustration.

Primo VE User Engagement Analytics

What's New?	Highlights	Impact
Launching a new platform for understanding how users behave within the user interface.	<ul style="list-style-type: none"> Working with customers focus group and early adopters throughout 2024. 	Make data-driven decisions and improve user engagement and retention. Understanding the user journey, identify pain points, drop-off points, locate the access points to Primo VE and more.

Support Melingo Search Plugin for Arabic

What's New?	Highlights	Impact
Expand searching in Arabic with linguistic morphology and inflections.	Adding support for Arabic linguistic search expansion using the Melingo add-on for the MENA region.	Better regional support for MENA institutions.