Response to Questions from

California Community Colleges

Unified Resource Management

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Web address: http://www.exlibrisgroup.com

1. **Is there somewhere we can get these slides so we can look over them in more detail?**

   Ex Libris: Yes, they will be posted at https://cclibrarians.org/.

2. **Can we use Primo as an OPAC without using it as a Discovery tool?**

   Ex Libris: Yes. Primo can be configured to discover the content from the library's catalog. Electronic inventory could be excluded from the discovery tool.

3. **Can Alma be used with any discovery platform or would we only need to use Primo?**

   Ex Libris: Alma must be used with Primo per the LSP contract.

4. **Have the strengths of Summon's central index been integrated into Primo?**

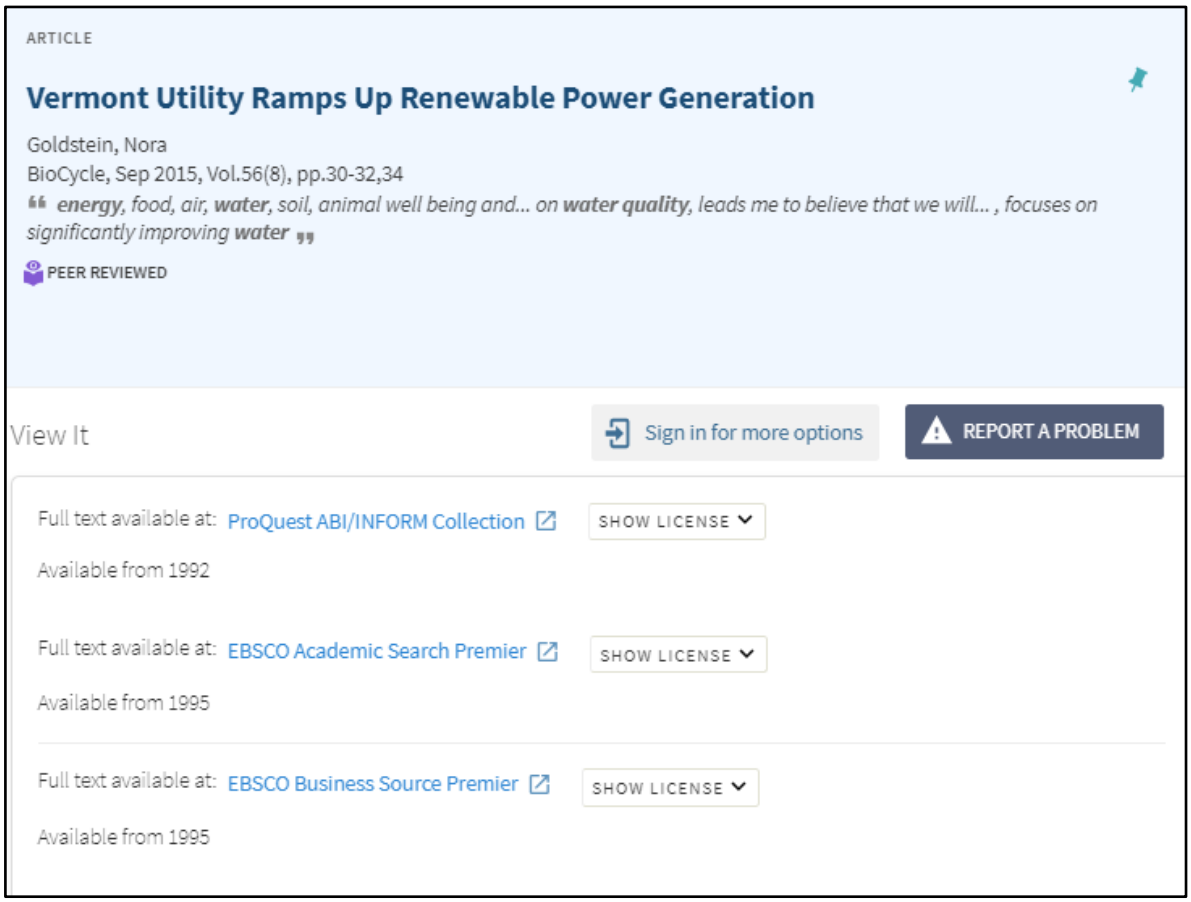
   Ex Libris: Yes. Following the acquisition of Ex Libris by ProQuest, the companies began a process of sharing content between the two indexes. While not identical, the two indexes are now substantially similar.

5. **Will Primo be able to integrate EBSCO results?**

   Ex Libris: Yes. While EBSCO does not share metadata records with Ex Libris for indexing in the Primo Center Index, we do provide an EBSCO search plug-in that searches the EBSCO API. In addition, EBSCO content that overlaps with other Ex Libris content provider partners will be discoverable. EBSCO titles can be activated in Alma and made accessible in Primo via the embedded Open URL link resolver.

The EBSCO plug-in appears in the Primo drop-down menu.

In the example illustrated below, a search the CSU San Marcos' Primo instance returns an article that is available from 3 different online sources, two of which are EBSCO products (note the library determines the order of display).



6. **If a college wanted to use a different Discovery service, how would that be handled. Does the college receive any compensation towards an alternative discovery tool?**

   Ex Libris: Alma must use Primo as its discovery layer.

7. **How well does Primo handle EBSCO databases via discovery? We're a library that has a lot of EBSCO content. How do the EBSCO databases integrate with Primo discovery, i.e. how does metadata get passed to Primo?**

   Ex Libris: Please see answer #5.

8. **How is relevancy determined? What are possibilities for privileging types of materials?**

Ex Libris: Search and ranking technology in Primo relies on a several factors. Primo evaluates the degree to which an item matches a query, a value score representing an item's academic significance, and the publication date of an item. Greater relevance is attributed to an item if the query terms occur in specific metadata fields of the item's record, such as the author, title, and subject fields—and if the order of the query

terms or phrases is the same in the query and the record. Primo evaluates parameters such as proximity of search terms and search type. Additional factors include:

- Identification of variations in terms and correction of spelling mistakes
- Expansion of searches based on word stems
- Expansion of search to full text if the original search yielded only few results
- Recognition of citation formats (for example, APA, MLA, or Chicago) and year of publication
- Recognition of compound words
- A value score representing an item's academic significance. The item's academic significance is calculated from factors unrelated to the query, such as whether the item was published in a peer-reviewed journal, how many times it has been cited, and what type of material it is, for example a journal article is considered more significant than a newspaper article.
- An item's relevance to the type of search. Primo infers the type of search that the user is conducting, such as a known-item search or a broad-topic search, and takes the type of material into account. In broad-topic searches, for example social intelligence, mining engineering, or operator theory, in which a user usually has no specific item in mind, Primo boosts overview material, such as reference articles. In known-item searches Primo looks at authors, exact titles or other variations including entire citations to boost the appropriate item to the top of the result list. Large scale log analysis and usability studies are the core source to identify and define such search types, and to understand the variations and their significance.
- Primo factors in that users usually prefer newer materials.

Primo can apply information about an area of study to deliver a search results "boost" for materials related to that discipline. This feature will generate a different ranking of results for the same search according to the patron's field of interest and is especially useful when queries are relevant to a variety of disciplines.

Libraries can configure settings to boost certain metadata field weights. Another ranking adjustment option is available for those libraries choosing to blend search results from different data sources into a single results list: prioritizing results from one source when compared to another, if all other factors are equal.

The following site links to more in-depth resources:

https://www.exlibrisgroup.com/products/primo-library-discovery/relevance-ranking/

We recommend the article Primo Discovery: Search, Ranking, and Beyond.

9. **Is there a list of community colleges using Primo? I understand there aren't any in California (yet!)**

   Ex Libris: Ventura Community College District is using Primo.

10. **We've put a fair amount of time into customizing our EDS interface. Could we keep using EDS?**

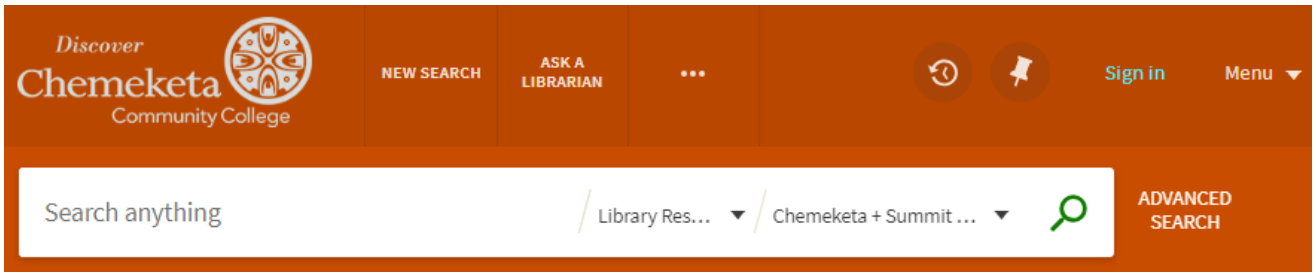
    Ex Libris: A library could of course continue subscribing to EDS independently, but at this time, EDS integration with Alma is not supported.

11. **Question: Would the Primo interface become the library's home page?**

    Ex Libris: That is one option. You can embed the search tool in the existing home page as another option. The interface is very customizable.

12. **Can we put a local brand on our Primo site?**

    Ex Libris: Yes, this can be done easily using the Primo Studio customization tool.



13. **Is there Banner integration with Alma?**

    Ex Libris: Yes. Alma integration with the Bursar system is detailed here: https://developers.exlibrisgroup.com/alma/integrations/bursar.

14. **Will we be able to customize the UX ourselves?**

    Ex Libris: Yes. Because every library has its own needs and brand, we have implemented a new customization framework that allows customers to tap into predefined hooks for each UI component, thus allowing them to customize each component as needed. The Primo Customization Package Manager enables customers to upload and manage customization packages, which allows branding and further customization of Primo. More details are available here: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/008Primo_VE_User_Interface/010Primo_VE_Customization_-_Best_Practices.

    In addition, our recently released Primo Studio tool gives customers a simple, intuitive interface for making changes to their Primo interface and user experience. Primo Studio is documented here: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/008Primo_VE_User_Interface/Primo_Studio_for_Primo_VE.

15. **On the landing page is there a possible widget for social media so we could insert twitter/instragram?**

    Ex Libris: Yes.

16. **Do we have control over the relevancy ranking of results?**

    Ex Libris: Please see answer #8.

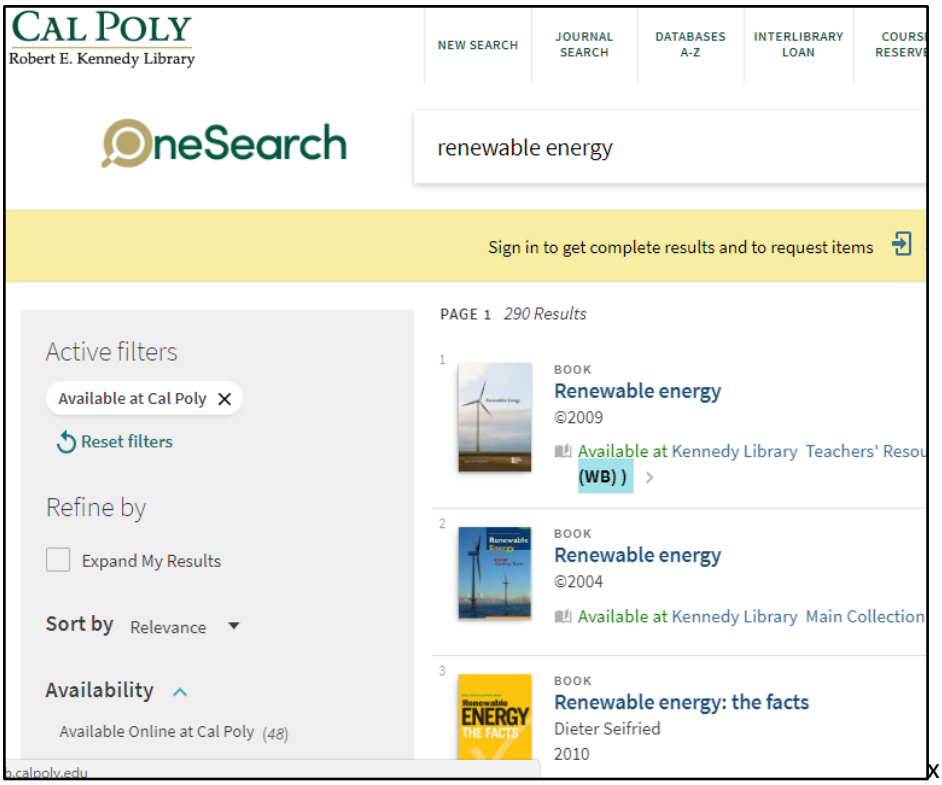
17. **Can we see a list of database vendors that you partner with?**

    Ex Libris: Please see our coverage lists available in the Ex Libris Knowledge Center:

    https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Product_Documentation/Primo_Central_Indexing

18. **Question: Can we have "Refine my results" appear to the left of search results instead of to the right?**

    Ex Libris: Yes. This is a simple configuration setting controlled in the Alma back office interface. Example below:



https://bit.ly/2QA72v3

19. **Question: How does this Primo interface work with a screen reader like JAWS or other disability supportive software?**

    Ex Libris: Primo is fully compliant with WCAG 2.0 AA standards. https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/System_Administration_Guide/010System_Architecture/070Accessibility

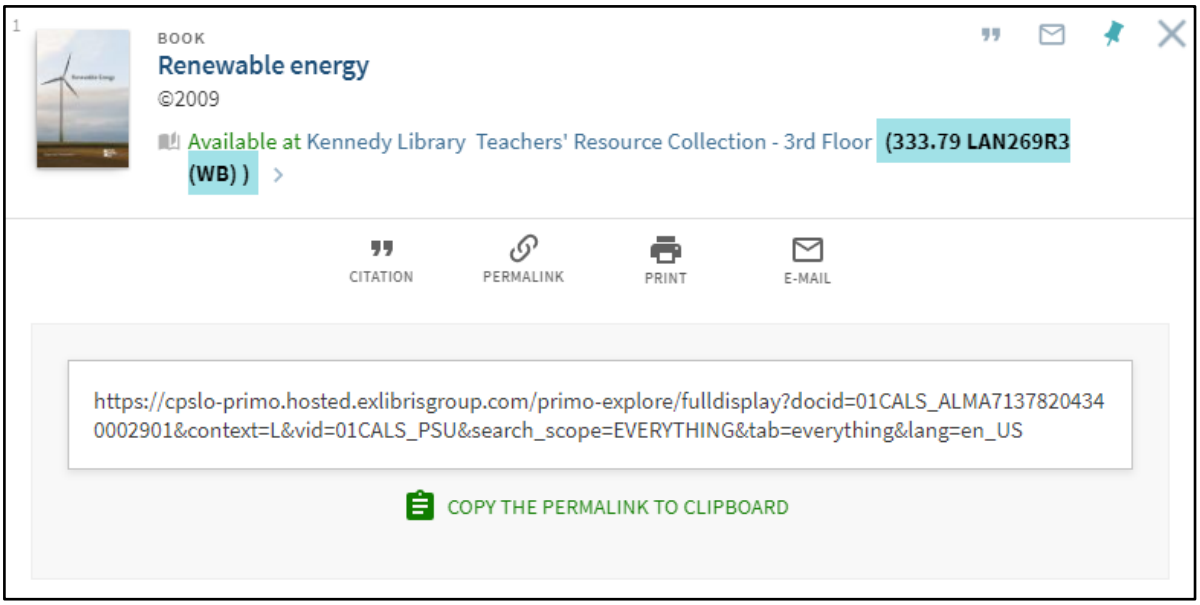
20. **Question: What account do they use to sign in? Alma?**

    Ex Libris: When Primo is integrated with the institutional authentication system, patrons can use their institutional authentication credentials to sign into Primo.

    Please see the following article for details about user authentication in Primo: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/030Authentication_Configuration/010Configuring_User_Authentication_for_Primo_VE

21. **Can we save a search, which would generate a link to that search result?**

    Ex Libris: Yes. The Primo URL embeds the attributes of each individual search. In addition, users can generate item level permalinks.



22. **Can Primo be used to create a link to search a particular set of databases that can then be "permalinked"?**

    Ex Libris: No. Unlike federated search, Primo is searching an index of pre-harvested metadata. Users can select from library-defined scopes, e.g. articles, catalog, institutional repository and course reserves. Primo does provide the option of including a database facet.

23. **Can the Primo login be set to our campus email login?**

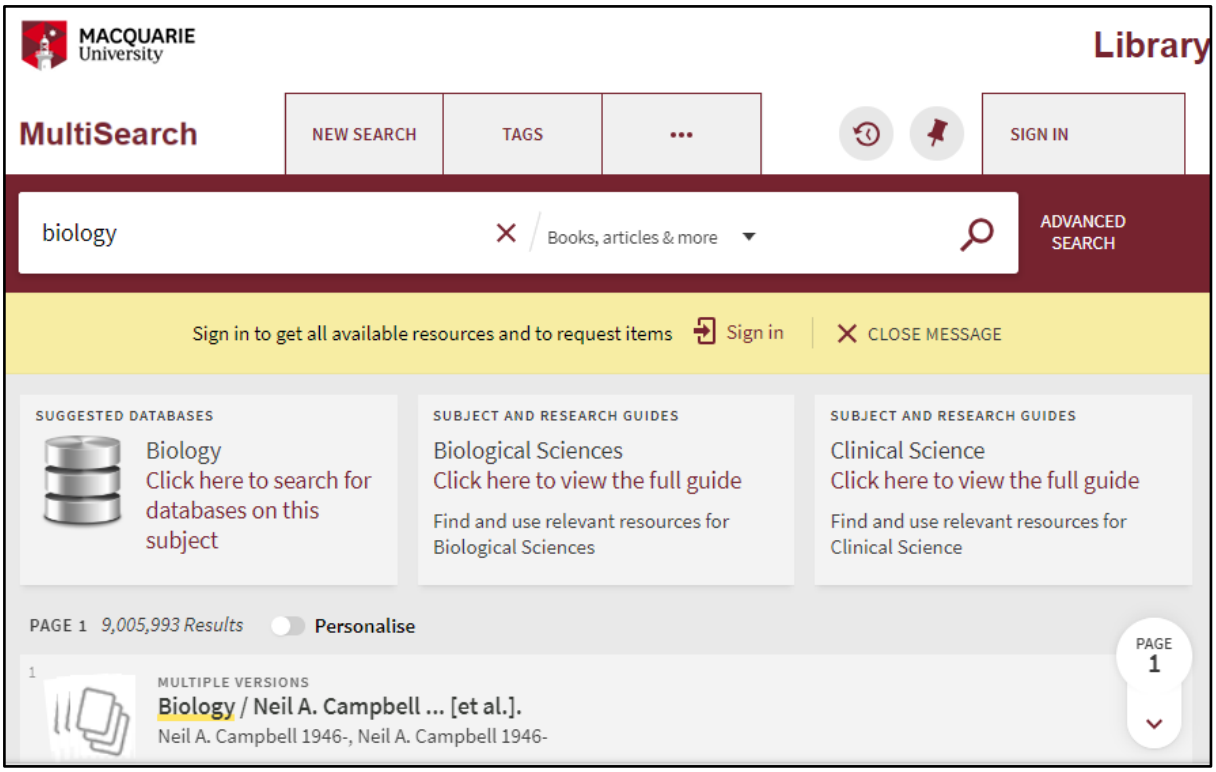
    Ex Libris: Yes.

24. **Does Alma/Primo have their own Proxy module? Or do we need a 3rd party module like EZProxy?**

    Ex Libris: No. You need a 3rd party proxy service.

25. **Can a GVRL book be "pushed" as a suggestion for broad terms such as these on the top of the screen?**

    Ex Libris: Each resource recommendation is an independent entry with a unique title, content, link and set of tagwords that trigger the message.



26. **Is the patron account--their renewals, requests, fines, circ history etc--part of Alma or part of Primo?**

    Ex Libris: The information is managed in Alma and presented to the patron via their Primo account.

27. **There is a "guest" version of Primo, of course, right?**

    Ex Libris: Yes.

28. **Question: We can configure which MARC fields are displayed?**

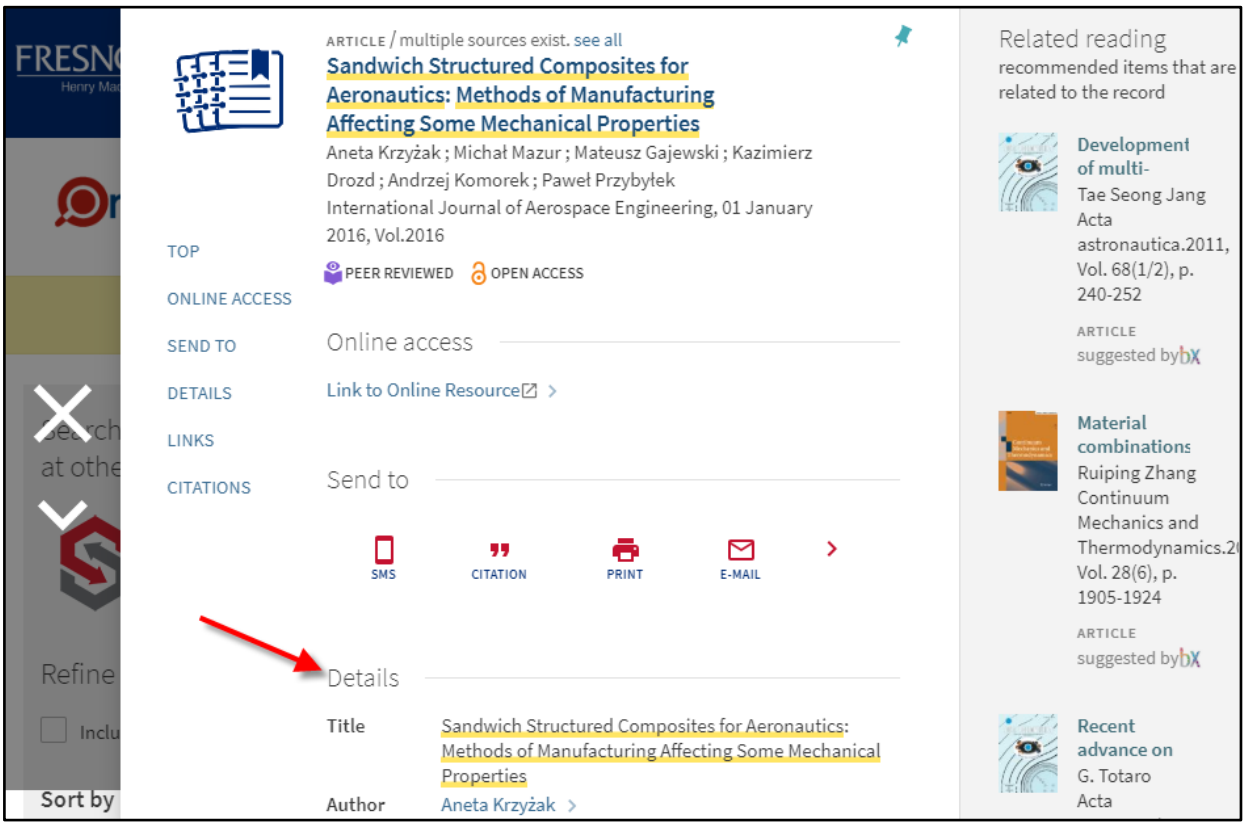
    Ex Libris: Yes. More information on configuring the bibliographic details in the Primo display is available here:

    https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Details_Service

29. **Is there a detailed view of the results? Like to see abstracts, subject headings and the like?**

    Ex Libris: Yes. Clicking on a title opens a full view of the record which includes citation, citation export options, patron actions, requesting option, availability, metadata display and user

engagement features. Primo also offers a full (staff) record view which display the underlying metadata record indexed in Primo.



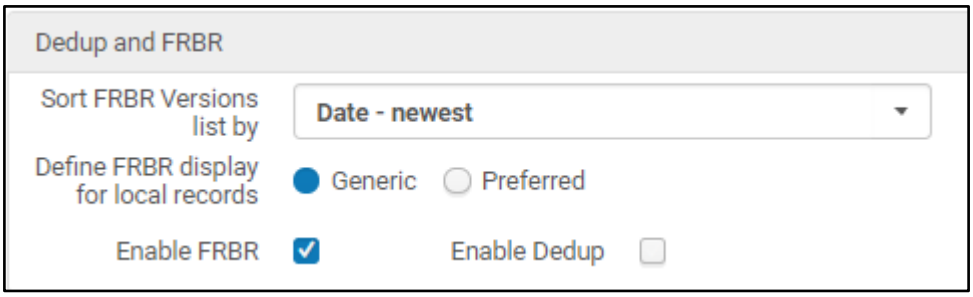
Details section of the full record view includes metadata. Customers select which fields they want displayed.

30. **Are the local notes integrated into the title/bib record, or stored separately and only merged for display?**

    Ex Libris: The local notes are integrated into the bibliographic record.

31. **Can we toggle on/off FRBRization?**

    Ex Libris: Yes. This function is controlled in the admin environment.



32. **Does "content types" include items we may have circulating that are physical objects: laptops, calculators?**

    Ex Libris: Yes. Content types include physical, electronic, digital, and also things like laptops, DVDs for check out, etc.

33. **How is "related reading" different than "virtual browse" which you showed us earlier?**

    Ex Libris: Related reading uses data drawn from OpenURL link resolver usage to identify a correlation of usage between articles. It displays articles related to the article being viewed based on this usage data. Virtual browse uses call number to generate a display of items.

34. **Can the "related readings" be limited to what is in the local library?**

    Ex Libris: Yes

35. **Where does the "cited in" information come from?**

    Ex Libris: CrossRef

36. **How strict does Primo require spelling? Does it need to be exact or will it provide suggestions?**

    Ex Libris: Primo works similarly to Google in this regard. Auto-correct, "did you mean", etc.

37. **For course reserve search, can we see the course ID the instructor is currently teaching to associate the textbook?**

    Ex Libris: Yes

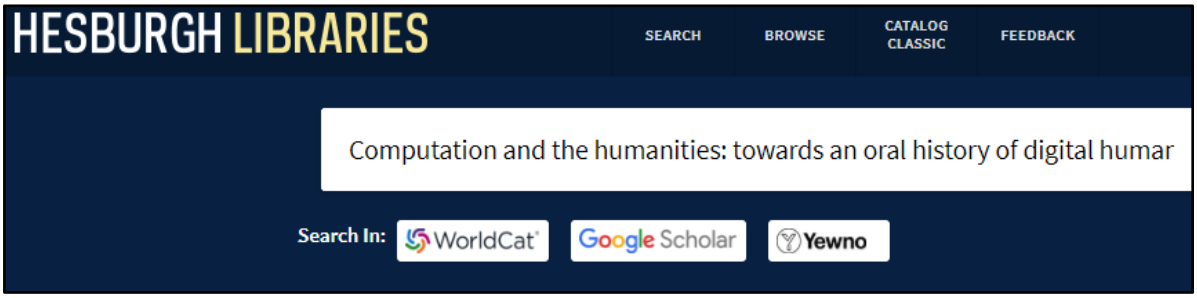
38. **How does Primo know who cited who?**

    Ex Libris: CrossRef provides the data.

39. We know Libguides and StackMap work with Primo. What other integrations are there?

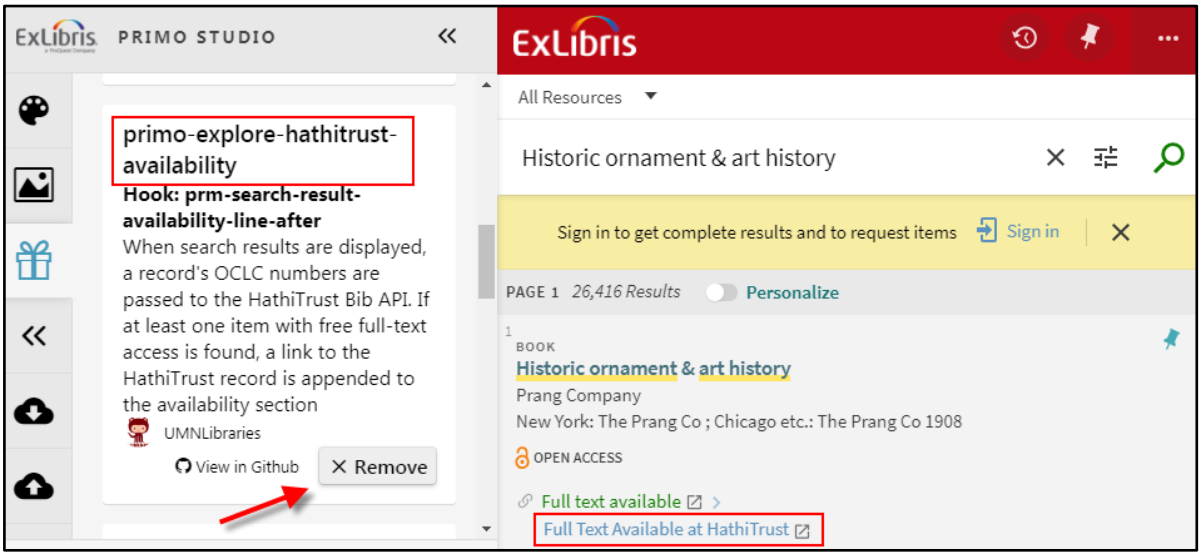
Ex Libris: Because Primo supports custom development, customers can incorporate a wide variety of text, features, widgets into the search interface to personalize the experience for their users. Primo enables libraries to extend or customize the new Primo user interface and share their innovations with the Primo Community. Library developers with Angular and CSS knowledge can extend the new Primo UI capabilities, develop additional functionalities, adapt the UI design, and connect Primo with external services.

At University of Notre Dame, we see integrated search for Yewno, Google Scholar and WorldCat, as well as a library chat widget.



https://ntrda.me/2D5MQ1c

The Primo Studio tool enables libraries to easily take advantage of custom development work done by other customers, providing a library of features that can be easily tested and added to the live environment, e.g. Hathi Trust availability widget as seen in the screen shot below.



40. Does Primo support SSO (single sign-on) with Windows Active Directory and other sources?

Ex Libris: Yes. Primo VE supports several authentication schemes, which are defined using Alma's integration profiles and can be selected for the use of patrons in Primo. An institution may choose to use more than one authentication scheme.

Supported authentication schemes include:

- LDAP
- SAML2 based authentication such as Shibboleth
- OAuth based authentication with Facebook, Google, or Twitter
- CAS

41. **Is Syndetic included with the statewide LSP project?**

    Ex Libris: No

42. **Can the students pay the overdue fee online?**

    Ex Libris: The Patron Services page enables circulation desk operators to receive payments from patrons for fines and fees. Please see the following article for more detail: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/020Circulation_Desk_Operations/040Managing_Patron_Services#Receiving_Payment_for_Fines_and_Fees.

43. **What are the possibilities for catalog overlays such as VuFind?**

    Ex Libris: Primo RESTful APIs provide access to information stored in Primo supporting integration with services like VuFind. The Developer Network is key to getting the most out of these APIs. In the Developer Network you'll find documentation for each of the interfaces, including a full description of the parameters and the data objects.

    For more details on Primo APIs, please visit: https://developers.exlibrisgroup.com/primo/apis.

44. **Does Alma/Primo include features like SFX?**

    Ex Libris: Yes, although SFX is a legacy Ex Libris link resolver. Alma has a newer built-in version.

45. **How would this work with Serials Solutions? Would I still need to subscribe to that service?**

    Ex Libris: Alma and Primo provide a full Electronic Resource Management solution enabling libraries to unify management of print and electronic resources. Alma includes an e-resource knowledgebase with bibliographic records, OpenURL link resolver, journal finder and discovery. A Serials Solutions subscription could be replaced.

46. **Are you saying that Primo can search digital collections platforms, like ContentDM? Or does Alma/Primo include a digital collections platform?**

Ex Libris: Digital objects and metadata can be indexed from external systems like ContentDM that support OAI-PMH. Records in Alma can be structured as "collections" and searched via the Primo Collection Discovery search interface.

47. **Would you be able to add search box to Canvas?**

    Ex Libris: A Primo Search box can be added to any local web page by embedding Primo's Brief Search deep link in an HTML form. For more information, please see: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Technical_Guide/110Embedding_the_Primo_Search_into_a_Local_Site/010Embedding_a_Primo_Search_Box.

48. **How well does this play with existing interfaces? We have Omni for our institution's website, and the library also uses SpringShare. Do we have to redesign our homepage to redirect, or will it integrate like an LTI or widget?**

    Ex Libris: The Primo HTML search box can be added to the library homepage or LibGuide page. Conducting a search from the search box will then redirect to the Primo search results page. Optionally, the library could add a link to their website to the Primo landing page.

49. **What's the best example of a library currently using Alma/Primo that's the most similar what the basic statewide LSP offer will look and act like?**

    Ex Libris: The CSU System offers the closest match – both in terms of topology and geographic proximity. Any of the 23 CSU campuses would be a good example.

50. **Where is the metadata in "topics" coming from?**

    Ex Libris: Subject terms come from either the libraries bibliographic records or from our content provider partners' source records.

51. **Does Ex-Libris assist with creating the desired search box for libraries to place on their home pages and other key areas?**

    Ex Libris: Our implementation team can share sample code to assist new customers in building their own search boxes.

52. **How easy is it to set up new database resources for use in Primo?**

    Ex Libris: Customers set up database packages from the Alma Community Zone Knowledgebase. The Knowledgebase is prepopulated with vendor database titles, bib records, coverage dates and linking syntaxes. The Ex Libris Content Operations Team maintains the Knowledgebase on behalf of the Alma user community.

    Once a desired database is found by searching the Knowledgebase, it can be ordered and activated in a streamlined workflow process. An Alma activation wizard guides the customer through the activation process which defines content package options, authentication, title

selection, publishing criteria, etc. Once e-inventory has been activated, the associated content in the Primo Central Index is made available for discovery in Primo.

53. Is it possible to do a call number search within our local collection?

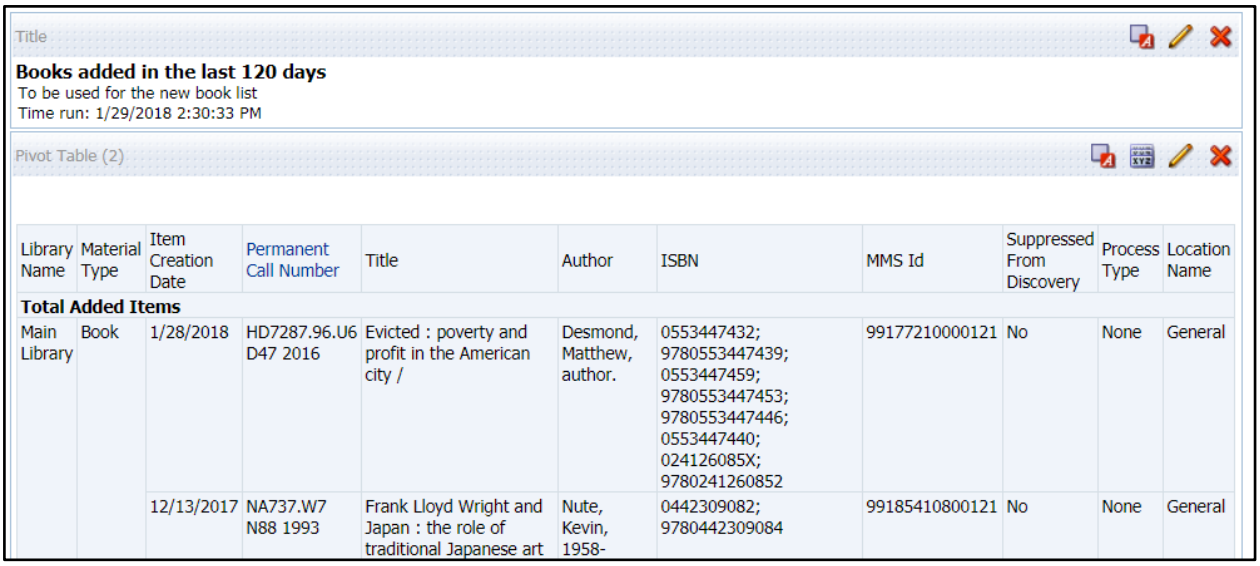
Ex Libris: Yes. The Primo Browse supports local call number searching.

54. Can we only use LCSH, not mesh, etc.?

Ex Libris: Mesh is supported.

55. Does Primo provide a new book list page?

Ex Libris: Many Alma libraries use Analytics reports to create a list of new materials with the fields they would like to include, then export the information using the Analytics API. A sample New Books report is shown below, but this could be customized to include additional or different fields or parameters:



Title

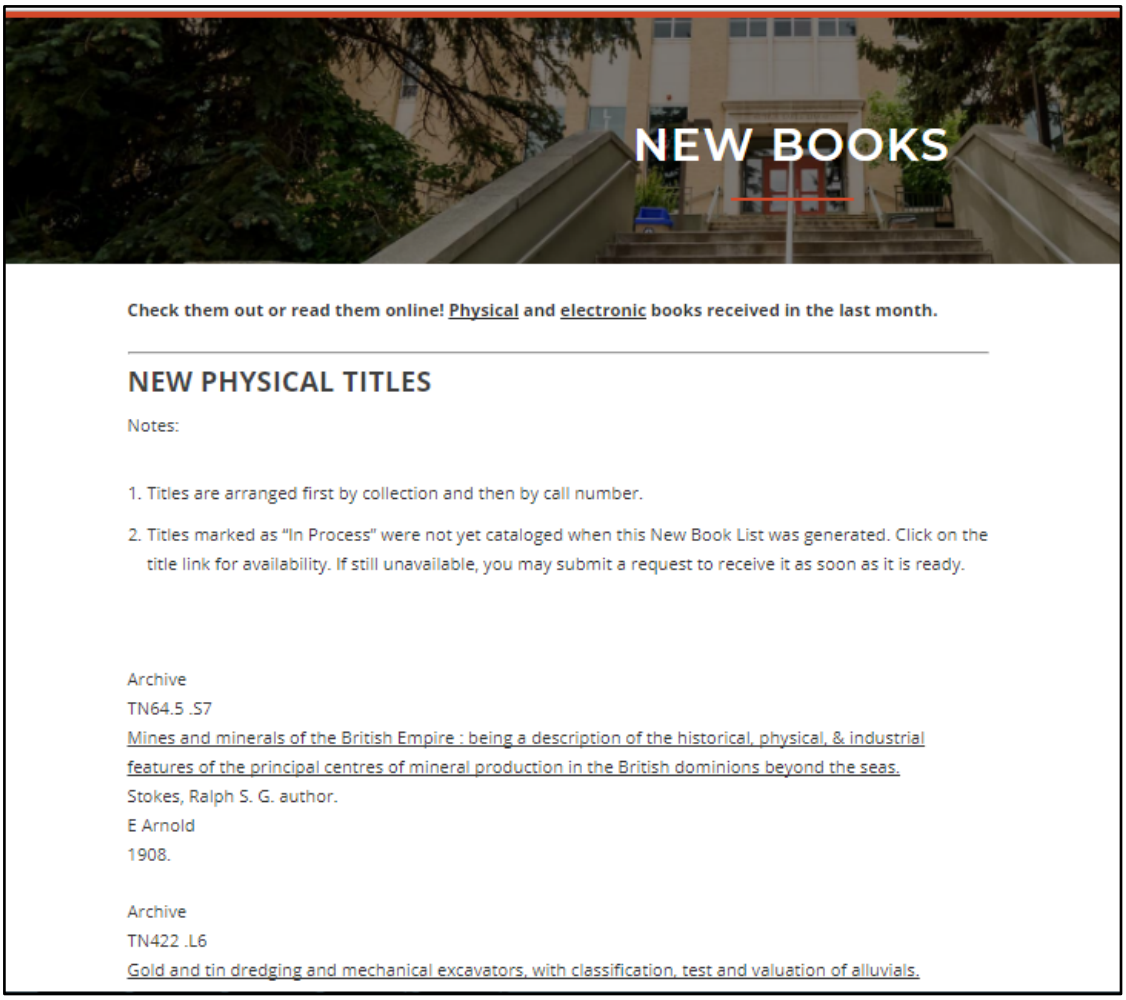
Books added in the last 120 days
To be used for the new book list
Time run: 1/29/2018 2:30:33 PM

Pivot Table (2)

Library Name	Material Type	Item Creation Date	Permanent Call Number	Title	Author	ISBN	MMS Id	Suppressed From Discovery	Process Type	Location Name
Total Added Items										
Main Library	Book	1/28/2018	HD7287.96.U6 D47 2016	Evicted : poverty and profit in the American city /	Desmond, Matthew, author.	0553447432; 9780553447439; 0553447459; 9780553447453; 9780553447446; 0553447440; 024126085X; 9780241260852	99177210000121	No	None	General
		12/13/2017	NA737.W7 N88 1993	Frank Lloyd Wright and Japan : the role of traditional Japanese art	Nute, Kevin, 1958-	0442309082; 9780442309084	99185410800121	No	None	General

A few examples of new books lists from customer are outlined below:

Colorado School of Mines has created a new books list that uses data from an Alma Analytics report. This is documented on the Developer Network: https://developers.exlibrisgroup.com/blog/Alma-New-Books-list-from-Analytics-Reports-to-Static-HTML-for-Web-Site-Inclusion



http://library.mines.edu/LB-New-Books-Lists#physical

Flinders University has a few new materials carousels that automatically scroll and are pre-limited by subject, also built using Alma Analytics and Primo Deep Links. The screenshot below shows the html view, but this could be embedded into another website:

http://library.flinders.edu.au/new/carousel/new_material_library_sciences.html

Northeastern has created a new books list that includes links back to the item in Primo:

Title	Publication Date	Author	Material Type	LC Class	Location	Library
#Hooked : why cute sells, and other marketing magic that we just can't resist	2016.	Fagan, Patrick, 1987-	Book	HF	Online	Snell Library
.NET development using the compiler API	[2016]	Bock, Jason	Book	QA	Online	Snell Library
1,001 ASVAB AFQT practice questions for dummies	[2017]	Johnston, Angie, 1978-	Book	U	Online	Snell Library
The 150 healthiest foods on Earth : the surprising, unbiased truth about what you should eat and why	[2017]	Bowden, Jonny	Book	RA	Online	Snell Library
200 more puzzling physics problems : with hints and solutions	2016.	Gnädig, Péter	Book	QC	Online	Snell Library
2016/2017 ASVAB for dummies	[2016]	Powers, Rod	Book	U	Online	Snell Library
The 3 gaps : are you making a difference?	[2015]	Smith, Hyrum W	Book	BJ	Online	Snell Library

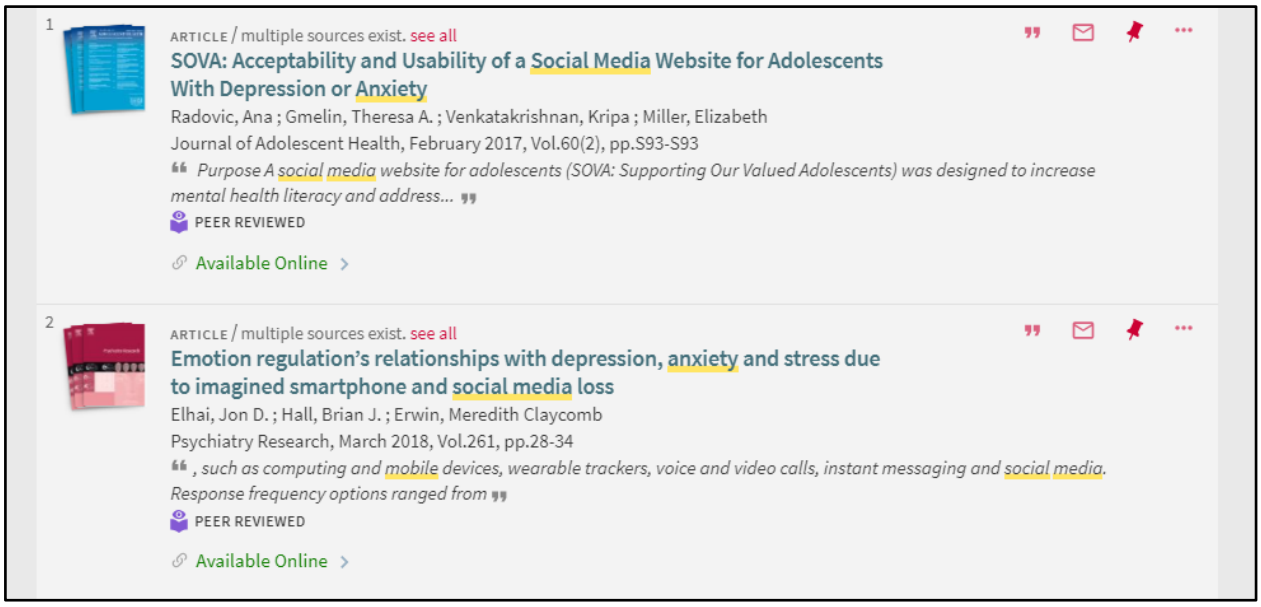
http://library.northeastern.edu/new-acquisitions-list

56. Are EBSCO databases listed in the "collections" tab?

Ex Libris: EBSCO databases are not available out-of-the-box (without using the EBSCO API plug-in). When using the EBSCO API the EBSCO facet code “domain” can be mapped to the Collection that displays in Primo.
https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/060Back_Office_Guide/110Additional_Primo_Features/Configuring_the_EBSCO_Plug-In#EBSCO_Search_Plug-In_Parameters

57. **Can abstracts be "captured" or used via Primo from its partners or is it different than Summon or EDS and it's only bibliographic lines and that's it?**

Ex Libris: Snippets can be taken from abstracts, full text, and tables of contents and displayed in the brief results. Below is a sample snippet, highlighting the search term usage in the full record:



58. **What/where is the interface for managing 3rd party collections to connect and become discoverable on primo?**

Ex Libris: We interpret this to mean external data sources. Please see the following article for details on the process of adding 3rd party collections:
https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/045Loading_Records_from_External_Sources_into_Primo_VE

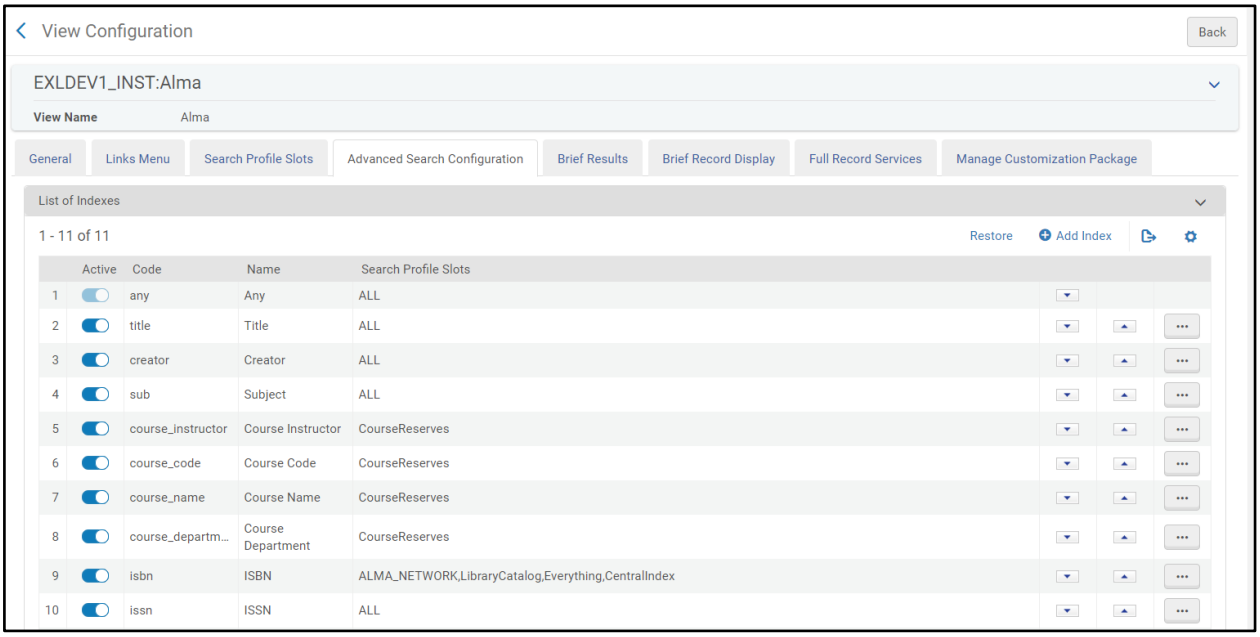
59. **Can we configure which MARC fields are inspected for deciding what format/content something is called?**

Ex Libris: Yes. Please see the following article for more details:
https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/050Configuring_Local_Resource_Types_for_Primo_VE

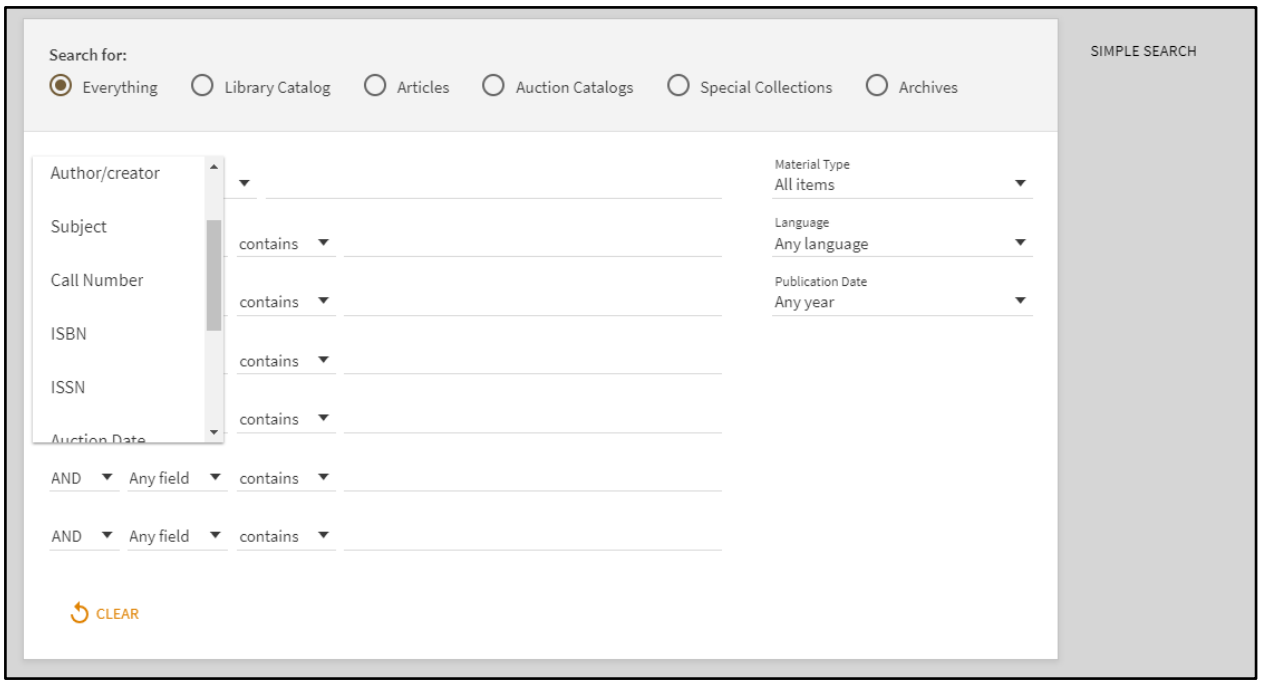
60. Can an expert search be done with index labels similar to WorldCat?

Ex Libris: Primo includes an advanced search. The institution can customize which fields should be available in the advance search, and the patron has the option to add additional lines as needed.

The fields that display are configured in Alma:



Below we see a sample Advanced Search from the Art Institute of Chicago, who has added some additional local fields:



https://artic-primo.hosted.exlibrisgroup.com/primo-explore/search?vid=01ARTIC&lang=en_US&sortby=rank

61. Can we create our own index for searching?

Ex Libris: Yes. Primo VE allows you to map information (such as notes) from the source records to local fields in Primo VE, where these fields can then be indexed for search queries, to filter search results with facets, and to display additional information in the record's brief and full displays:

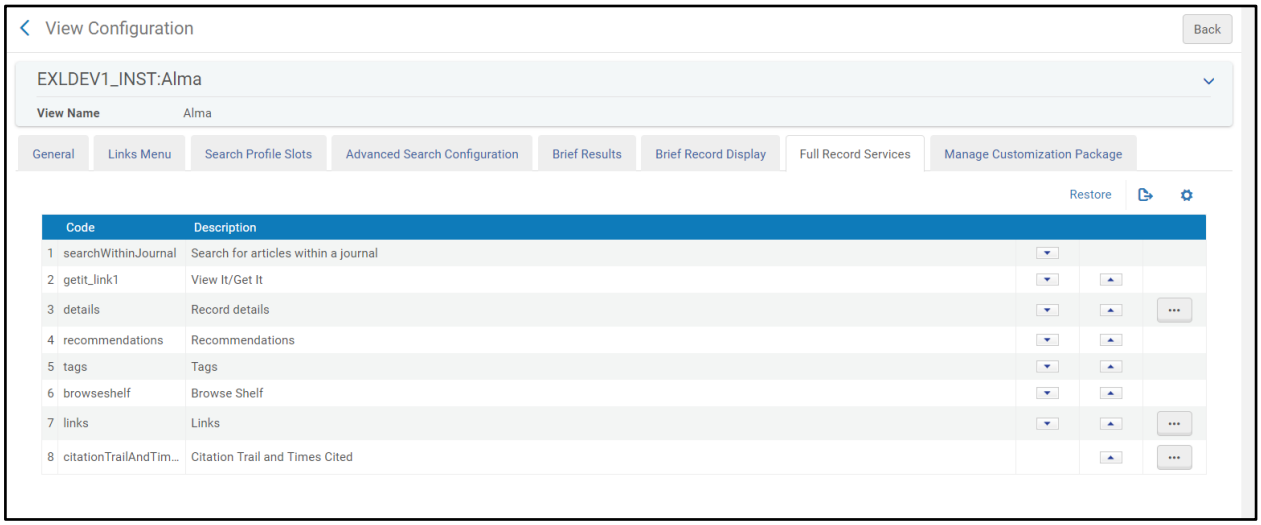
https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/040Configuring_Local_Display_and_Search_Fields_for_Primo_VE

62. Can we search the local notes/data fields?

Ex Libris: Please see response #61. They can be added as a searchable field. Local fields can display in the advanced search, allowing them to search within a specific local field. Re-indexing takes 15 minutes.

63. Is there a way to customize the size of book cover images and the position and size of the call #s and locations?

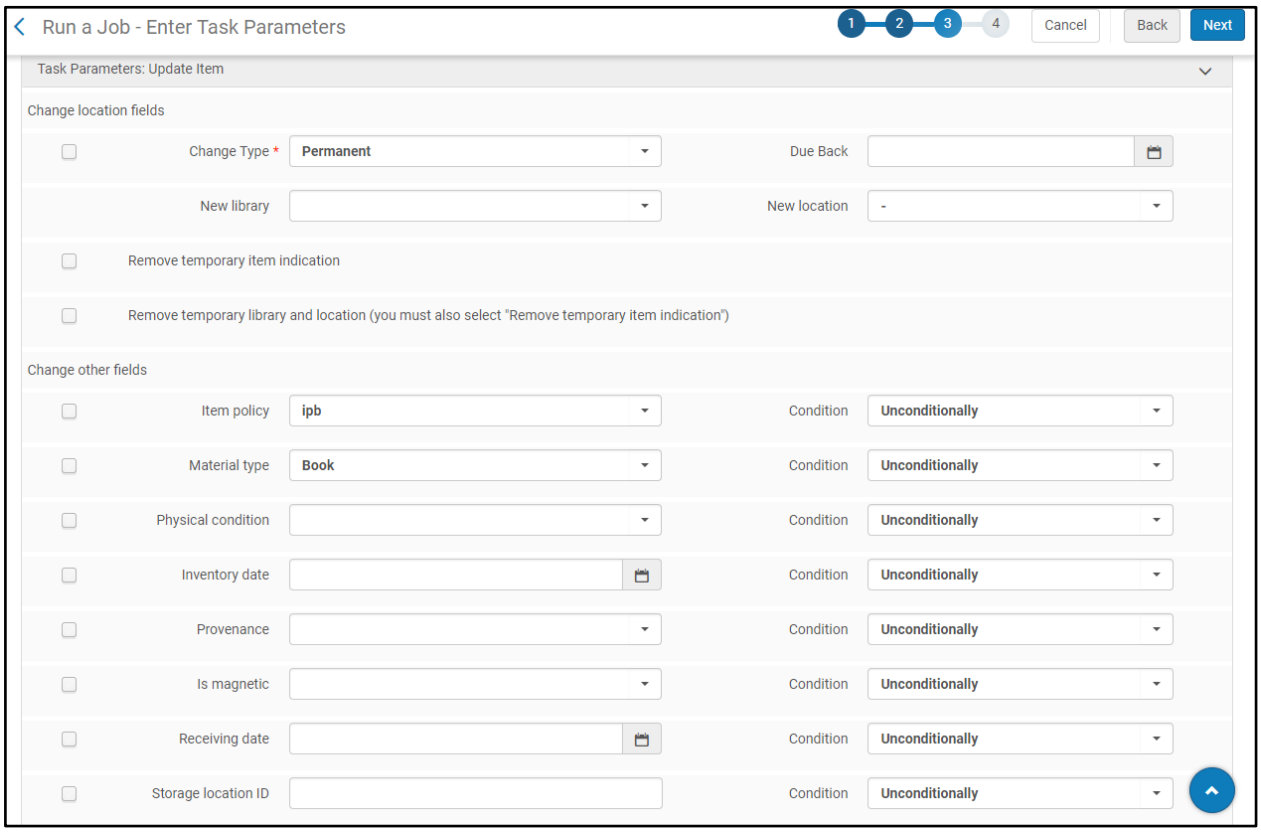
Ex Libris: Yes. The position of the “Get It” section can be moved up or down on the page if you would like it to be higher or lower in the full details page:

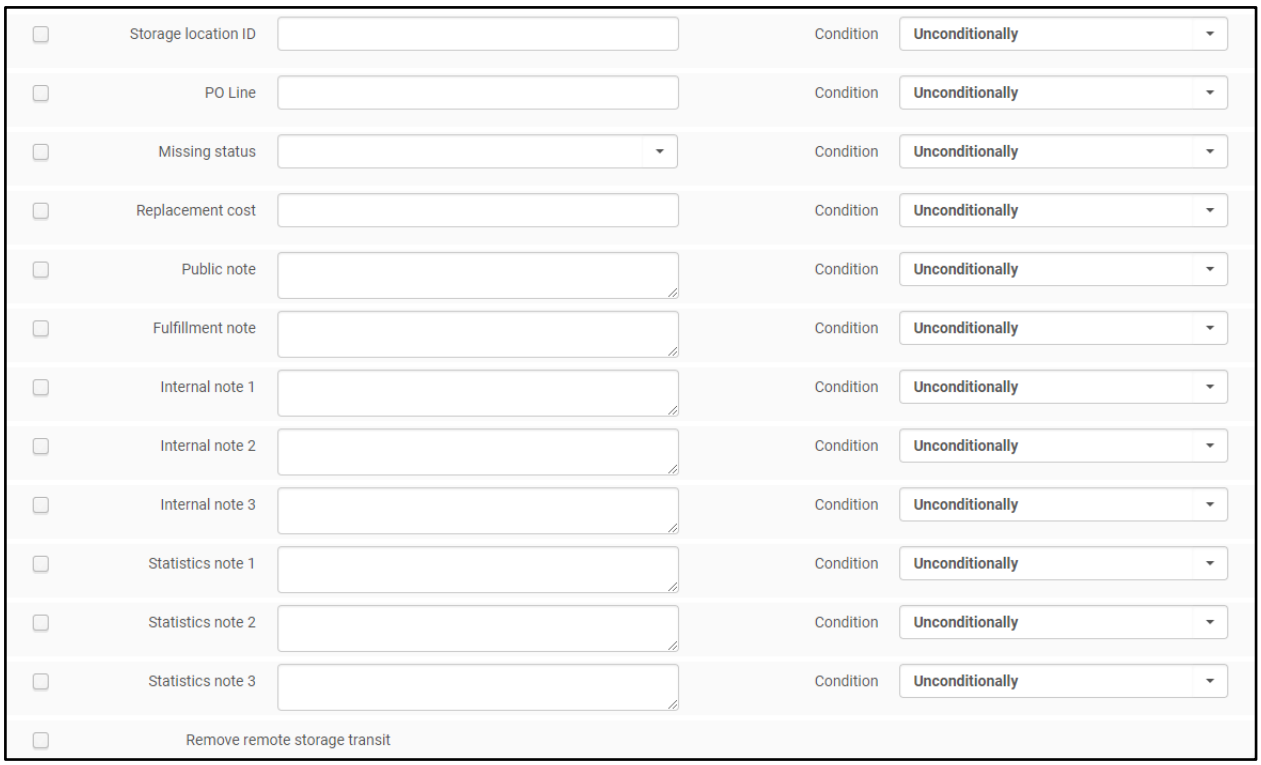


In addition, the Primo interface itself, including font sizes and spacing, can be customized using CSS and AngularJS. The Primo user interfaces utilizes a customization framework that allows customers to tap into predefined hooks for each UI component, thus allowing libraries to customize each component as needed.

64. Can actions and updates be batched on records in the course reserves module?

Ex Libris: Alma includes jobs to make bulk changes to sets of records. For example, there is a "Change Item Information" job that allows you to place items in a temporary location, change the item policy, and add notes, among other options. This could be done to sets of records that are on a course reserves reading list.


Run a Job - Enter Task Parameters
1
2
3
4
Cancel
Back
Next
Task Parameters: Update Item
Change location fields
Change Type *
Permanent
Due Back
New library
New location
-
Remove temporary item indication
Remove temporary library and location (you must also select "Remove temporary item indication")
Change other fields
Item policy
ipb
Condition
Unconditionally
Material type
Book
Physical condition
Inventory date
Provenance
Is magnetic
Receiving date
Storage location ID


Storage location ID
Condition
Unconditionally
PO Line
Condition
Unconditionally
Missing status
Condition
Unconditionally
Replacement cost
Condition
Unconditionally
Public note
Condition
Unconditionally
Fulfillment note
Condition
Unconditionally
Internal note 1
Condition
Unconditionally
Internal note 2
Condition
Unconditionally
Internal note 3
Condition
Unconditionally
Statistics note 1
Condition
Unconditionally
Statistics note 2
Condition
Unconditionally
Statistics note 3
Condition
Unconditionally
Remove remote storage transit