



# **EX LIBRIS Primo/Primo Central QUESTION & ANSWER**

9th IGeLU Meeting

Session 12

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## **QUESTION 1**

### Primo Roadmap

Is there a Primo roadmap and, if so, will it be made available? Are there plans to rewrite the interface in order to create a more modern discovery tool better suited to current needs and expectations?

## **ANSWER 1**

Primo has a solid roadmap that was presented as part of the Primo update session. We plan to publish a roadmap for 12 months at the beginning of 2015.

Two major topics on our roadmap for 2015 are enhanced responsive design UI for mobile devices and major UI modification in Primo, making the UI more modern and intuitive.

## **QUESTION 2**

Problems with quality control of Primo 4.5. to 4.8

The quality of the last four service packs we tested was suboptimal (4.5 to 4.8, we had to skip one and installed the other two only with several Hot Fixes). We are questioning whether the quality assessment on Ex Libris' side was effective here. Are there future plans to enhance the quality assessment of service packs for Primo?

## ANSWER 2

Indeed we had quality issues in the last year, primarily with version 4.5 and 4.6, but we are improving. The source of these issues was the major infrastructure changes that were introduced in version 4.5.

Versions 4.7 and 4.8 were better, judging by a decrease in the number of new support incidents, though not yet perfect. We are confident that next versions are going to be better still.

To address the quality issues, we have been investing more in automated process and we restructured the team so that the QA staff are now part of R&D—reporting to the development director—and are taking part at the very early stages of the development cycle.

We would like to emphasize that QA has great challenges in the testing: the fact that there are so many topologies and variations in the implementations makes the testing complex and time consuming.

We therefore encourage customers to migrate to our major SaaS platform.

## QUESTION 3

Distinction between cloud and local installations

As of Primo Service Pack 4.7 the new Autocomplete feature was introduced for cloud customers only and Service Pack 4.8 was released to cloud customers two weeks before it was released to other customers. What can we expect from this distinction between cloud customers and customers who have installed primo locally? Will Ex Libris implement more and more cloud only features and maybe release cloud only primo versions?

## ANSWER 3

Primo releases will still be available for both local and Cloud customer.

However, we encourage customers to move to the cloud. True cloud environment will enable us to provide customers with a better service: we will be able to launch releases in more rapid way and in better quality.

In future releases, we may introduce some functionality that relies on the cloud infrastructure and therefore will not be relevant to local customers.

## **QUESTION 4**

### Response Time for Primo Central issues

Are there plans to resolve Primo Central issues more quickly? We reported a data problem back in January, which results in users being presented with false positive results. We have been told it could be Q3 2015 before it is resolved, which we do not think is acceptable for such a key usability issue.



## ANSWER 4

The question is not clear, but I assume that you refer to fixing data issues.

First, we work with information providers to address data issues. In many cases, it takes a long time to get their response. The PRR team is responsible for this communication.

Issues such as wrong mapping and missing fields typically result from changes in the data feeds or inconsistencies in the data. We are aware of these issues and therefore decided to reload the Primo Central content.

Loading the data is a long process. It has already started in September and will take us about a year. The process is taking place in parallel to uploading new collections and taking care of updates (we have ~3M record updates per week, by average). Nevertheless, we expect to reload 70% of the content by February 2015.

At the beginning of September we make an organizational change to increase our efficiency and better handle processes related to Primo Central. The PRR team is now only taking care of the initial analysis of the data, but the rest of the work is done by Primo Central operation (PCO) team. To support this change, we added a librarian to the PCO team . This librarian is responsible for testing the data.

## QUESTION 5

### Update of Primo Central resources

In several instances Primo Central resources have not been updated for more than a year without Ex Libris noticing the interruption of the supply of current metadata. Although these cases have been brought to Ex Libris' attention through the approved channels, the resources are still listed in the Resource Collection Activation interface as being updated on a weekly or monthly basis. This is grossly misleading, since regular updates have not been resumed. Which mechanisms are in place to monitor the ongoing updates of Primo Central resources, and how will subscribers be informed if a PCI resource ceases to be available?

## ANSWER 5

First, I'd like to clarify that we do monitor the pipes and we were aware of the failed uploads. The issues are related to only a few pipes (~20) out of over 1200 pipes that we run every week. The problem is at the provider's end, and we do communicate with the provider—however, providers are not always quick to respond.

The indication in the registration system refers to the update schedule (typically once a week) but not to the last update date. Following the incidents to which you refer, we will check the options to add a "last updated" indication to the screen.

## **QUESTION 6**

Ebsco content in Primo Central

What is the current status of negotiations with Ebsco about adding Ebsco content to the Primo Central database?

## ANSWER 6

As explained at the URD update session, there is no agreement yet between Ex Libris and EBSCO.

We expect to be able to index the entire EBSCO content, include A&I databases, and make it available to mutual customers through Primo. We offer, in exchange, the full set of our interfaces. These are the principles of our agreement with ProQuest.

EBSCO refuse to enable A&I databases for discovery and do not suggest any roadmap for a later inclusion of these important collections. They do, however, require all Ex Libris APIs in exchange for the partial content.

The Ex Libris two proposals—full content for all APIs or partial content for a partial set of APIs—are still on the table and we look forward to further discussions.

## **QUESTION 7**

### Problems with Primo's BIRT-reports

We are having problems with Primo's BIRT-reports. First the documentation is incomplete, so with most reports we are not sure what exactly we get from them. Second we would like to know if other institutions are using them. If not, we would like to know why? Also we would like to know how they are perceived in general.

## **ANSWER 7**

We are going to improve our documentation for the BIRT reports and make sure that the documentation is clear and complete.

Many Primo customers are using the reports. There are some issues that were reported by customers. These issues are currently under analysis and will be fixed as part of our next releases.

## QUESTION 8

### Dateslider and creation date facet

We were extremely discontent with how the dateslider was implemented. Are there future plans to include customers' needs more when it comes to projecting new enhancements. The way how dates before 1000 AD are handled is unacceptable for us.

Concerning the creation of the date facet - will Ex Libris revise the rules for normalising the create date facet to correctly reflect the date of publication/creation of the items? Alternatively, will Ex Libris allow customers more local control over how these dates are normalised? The grouping of records into date ranges of 500, 100 or 10 years is confusing for librarians and patrons alike.



## ANSWER 8

Ex Libris strongly believes in collaboration with our customers and, whenever possible, seeks for input and feedback from customers during the development phase. Furthermore, many enhancements are responding to requests from the community and we are discussing these with the working group on a regular basis. The goal of these discussion is to understand the use cases and make sure we develop features that meet our customer needs. Furthermore, we plan to discuss with this group possible beta testing for specific enhancements.

For our search and ranking enhancements, we have established an advisory group and are working with the group members to the define the major needs and get feedback during the development cycle.

The changing of the normalization and indexing mechanism of the creation date is currently under analysis. In light of the significance of this topic to our customers, changes will be added to the Primo roadmap.

## QUESTION 9

### Accessibility Guidelines for Primo

It is a little unclear to us to which extent Ex Libris supports the W3C accessibility standard, see <http://www.w3.org/standards/webdesign/accessibility>. We are working on a certification for our Primo site and are running into some unexpected issues there regarding accessibility. We are unable to find any documentation on this matter. Is there any documentation out there? If not, could Ex Libris provide some? Which strategy has Ex Libris in general taken the W3C accessibility standard into consideration?

## **ANSWER 9**

The end-user interface of Primo was designed and developed to comply with the Web Content Accessibility Guidelines (WCAG) 2.0: level AA and with Section 508.

We conduct continual automated and manual accessibility testing in every Primo release.

Primo Voluntary Product Evaluation Template (VPAT) addresses the compliance of Primo with section 508. This document is available on the documentation center:

Home > Documentation Center > Ex Libris Documentation Center > Primo > Sales and Marketing > Brochures and Product Sheets

## **QUESTION 10**

Holistic approach to HTML and CSS

Following up on a recent discussion on the Primo mailing list about the inconsistent and unsensible structure of the Primo UI HTML, which makes it very hard to customize it in an easy and permanent manner, causing a lot of extra work and frustration among customers: is Ex Libris willing to investigate the options of implementing a holistic HTML approach?

## **ANSWER 10**

Ex Libris is looking at implementing a holistic HTML approach while using the most modern web technology. As part of our roadmap planning process, we will consider adding this capability.