**ACAD Discovery/PrimoVE User Group Meeting – 10/20/23 via Teams**

**Discussion Items**

* UPDATE: Display Documents Attributes for CDI Records from CDI-August Release: What's New with Primo Video – July 2023 has 8-minute segment with information at the 11:27 mark - <https://www.youtube.com/watch?v=WQGZqcJWxDE> - documentation also found at -[https://knowledge.exlibrisgroup.com/Primo/Content\_Corner/Central\_Discovery\_Index/Documentation\_and\_Training/Documentation\_and\_Training\_(English)/CDI\_-\_The\_Central\_Discovery\_Index/CDI\_Document\_Attributes](https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_%28English%29/CDI_-_The_Central_Discovery_Index/CDI_Document_Attributes)
	+ NISO voting/discussion in December --- may have to delay until after things are decided again.
* UPDATE: SMS options w/NDUS - NDUS investigating
* UPDATE: Primo “Expand Your Search” and CDI – There was an online seminar, CDI Activation: EasyActive and FullyFlexible, on September 6th. [Link to webinar video](https://share.vidyard.com/watch/8dZW1XkvvxuBkNkZ2SQQ5q). Slides from the video are available in the Recordings of Previous Sessions section on the [Alma Insights page](https://knowledge.exlibrisgroup.com/Alma/Training/Webinars/Alma_Insights). (thank you for the links, Liz!) We will schedule a session to discuss questions and options with both DISCOVERY and CATALOGING User Groups invited.
	+ Option #1: EasyActive - [https://knowledge.exlibrisgroup.com/Alma/Product\_Documentation/010Alma\_Online\_Help\_(English)/Electronic\_Resource\_Management/060\_Alma\_Single\_Activation\_Source\_for\_CDI/040Single\_Activation\_with\_the\_EasyActive\_Setting](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/040Single_Activation_with_the_EasyActive_Setting)
	+ Option #2: FullyFlexible - [https://knowledge.exlibrisgroup.com/Alma/Product\_Documentation/010Alma\_Online\_Help\_(English)/Electronic\_Resource\_Management/060\_Alma\_Single\_Activation\_Source\_for\_CDI/020Single\_Activation\_with\_the\_Fully\_Flexible\_Setting](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/020Single_Activation_with_the_Fully_Flexible_Setting)
* UPDATE/DISCUSS/DEMO: ExL tool that does suggestions/Promote topics/guides
	+ Option #1: Resource Recommender
		- Free and available now
		- Manually display resources (database links, Websites, Libguides, Events, Librarians) based on the query exactly matching the searchable tag(s)
		- Shows just below the search box up to three at a time. [https://knowledge.exlibrisgroup.com/Primo/Product\_Documentation/020Primo\_VE/Primo\_VE\_(English)/120Other\_Configurations/010Resource\_Recommender\_for\_Primo\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_%28English%29/120Other_Configurations/010Resource_Recommender_for_Primo_VE)
		- Primo VE Become an Expert training has session on Search interfaces. Info on Search Results for Topic Overview and Resource Recommender starts just after the 49-minute mark: <https://share.vidyard.com/watch/NQ87TkiaRtZ3UAke2Hs6HV>
	+ Option #2: bX
		- Add on product - can be purchased individually – does not require consortium adoption - recurring subscription fee = $3,300 / year / institution
		- Displays related articles based on aggregated usage beyond Primo
		- Shows in the right column for articles and ebooks in the Full Display
		- <https://exlibrisgroup.com/products/bx-recommender/>
		- Configuration documentation: [https://knowledge.exlibrisgroup.com/Primo/Product\_Documentation/020Primo\_VE/Primo\_VE\_(English)/120Other\_Configurations/Configuring\_bX\_Recommendations\_for\_Primo\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_%28English%29/120Other_Configurations/Configuring_bX_Recommendations_for_Primo_VE)
	+ See both in action at Harvard: <https://hollis.harvard.edu/primo-explore/search?vid=HVD2&lang=en_US>

**November Sneak Preview** – from [Primo VE 2023 Release Notes](https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE/2023/010Primo_VE_2023_Release_Notes?mon=202308BASE)

* + Improve Search Experience when No Results Found.
	+ Introduce New Carrousel Widget to Embed Library resources in other sites
	+ Add configuration to use Filtered/Expand search for Citation Trail results.
	+ Enhancing DEDUP & FRBR Definitions to include Keys based on local fields.
	+ Define additional availability statuses when using Discovery Import Profile.
	+ Support UNIMARC in Discovery Import Profile.

The 2023 Primo customer online seminar program continues, Tuesday, October 24, with our **What’s New with Primo** sessions! Next week’s What’s New session will highlight the newest enhancements for Primo, including the following items becoming available in the November 2023 release – **New Feature Release install date is November 12**.

* Enable Users to Filter or Expand Citation Trail Results
* Improve Search Experience for No Results Found
* Preserve the Formatting of Citations Copied from Primo
* Support Filtering of CDI Records with OA (Open Access) Links from Unpaywall
* Support Restricted Availability Statuses for External Records
* Create Local Keys for FRBR/Dedup Matching

**What’s New with Primo (Tuesday, October 24)**

* AMERICAS (Chicago) 10am, EMEA (London) 4pm | [Register](https://clarivatesupport.webex.com/weblink/register/ra364873c0403d8828d78b08753b002f9)

**Member Updates**:

* Bismarck State College -
* Dakota College at Bottineau
* Dickinson State University
* Lake Region State College
* Mayville State University -
* Minot State University
* North Dakota State College of Science - serial delete project nearing completion; relocation of archives – progress made; new LibGuides x 2
* North Dakota State University – Renovations have begun; Processing files for GreenGlass project
* Trinity Bible College
* University of Jamestown – nothing on the discovery side; our new part-time remote Online Research and Instruction Librarian started (Can’t remember if that had been shared already)
* University of North Dakota - CFL   - Systems librarian – will be hiring again.
* UND – Law
* UND – Med
* Valley City State University
* Williston State College
* ODIN - ODIN Director update. NDLA (North Dakota Library Association) in Fargo. Please consider [self-nomination for User Group Chair Position](https://www.odin.nodak.edu/form/2023-academic-user-group-chair-n). Nominations close November 1st and elections will be held in December.
 

 **Future Topics**:

* MONITOR: Update on 651 Geographical Name ticket – possibly addressed in August release
* MONITOR: Email from Nili Natan (Primo Product Manager) sent to Primo Listserv 6/14/23. " We are working in Primo VE to make sure that there will be no difference when selecting the same type with the new Resource Type Filter Bar or Facet Resource type. We will update on this fix in the upcoming release notes so you will be able to test again and activate the Resource Type Filter Bar.”

**Next Meeting**:  11/17/23 11 AM

Primo links for all colleges can be found: <https://www.odin.nodak.edu/academic>