

WACTCLC Fulfillment / Primo Weekly Call - May 29, 2018

Recording

<https://bigbend.zoom.us/recording/share/eFgYdPK8-BFTpwVZe8ST-xYYOxUxQLuooRpqK7qX-NKwlumekTziMw>

Attendees

Amy Herman - Olympic College
Cara Beth - Grays Harbor
charly.eaton
elenabianco
George Babcock -- Edmonds
John Anderson Big Bend
Jonathan.Miller
Kim.Mitchell
Kirsti Thomas (Seattle)
Laura Staley - Renton Tech
Lesley at Pierce
Leslie Potter-Henderson# Shoreline
Lily Kun
Nadine -GRC
Naoko (Highline)
Nicole-Bellevue
Ryer Banta - Centralia College
Shellie Whittaker - Consortium
Tammy Siebenberg (YVC)
Traci Taylor - BTC
Troy Farnham - LCC
Wade Guidry

Scheduling weekly Alma / Primo meetings for the summer

<https://goo.gl/forms/9aEhhRF6y7UvppAY2>

Fiscal Close

We will continue fiscal close conversation at Thursday's Tech Services call

Primo VE Webinar Opportunities in June / July

(From ExLibris email) In addition to these materials, we hope you can attend one of several webinars in June and July. Register sessions on our [Primo webinar program page](#), where you can also convert session times to your current time zone:

- **Primo Feature Spotlight: Newspaper Search**

Learn more about this new feature which enables you to increase the discoverability of content from newspapers, magazines and other news resources.

- June 6 – 7:00 am (London), 9:00 am (Tel Aviv), 4:00 pm (Sydney)
- June 6 – 8:00 am (San Francisco), 11:00 am (New York), 4:00 pm (London), 6:00 pm (Tel Aviv)

- **Primo Feature Spotlight: Primo Studio**

Learn how you can create your own discovery experience, share in the innovations of other members of the Ex Libris community, and make contributions of your own

- June 13 – 7:00 am (London), 9:00 am (Tel Aviv), 4:00 pm (Sydney)
- June 13 – 8:00 am (San Francisco), 11:00 am (New York), 4:00 pm (London), 6:00 pm (Tel Aviv)

- **Primo VE: Experience the Benefits by Streamlining Primo and Alma**

Discover the benefits of Primo VE, watch a demo, understand how to implement it, and ask us questions.

- July 9 – 8:00 am (San Francisco), 11:00 am (New York), 4:00 pm (London), 6:00 pm (Tel Aviv)
- July 12 – 7:00 am (London), 9:00 am (Tel Aviv), 4:00 pm (Sydney)

- **Primo August 2018 Release Highlights**

Gain insight into the features and functionalities to become available through the August 2018 release for Primo.

- July 17 – 7:00 am (London), 9:00 am (Tel Aviv), 4:00 pm (Sydney)

- July 17 – 8:00 am (San Francisco), 11:00 am (New York), 4:00 pm (London), 6:00 pm (Tel Aviv)

Summer Projects - by Institution

General ideas:

Patron purge / record cleanup

Electronic resources - review activations in Alma and Primo (look at open access resources)

By Institution:

Renton	Inventory, the whole collection (first time), letters
GRC	Inventory, (first time)
Pierce	Reloan limits, Inventory, Letters, Primo UI, Electronic Resources
Olympic	Licensing, Inventory
Bellevue	COUNTER reporting
BTC	Inventory, reloan limits, letters, IPEDS, acquisitions investigation
Edmonds	Alma certification, weeding, inventory
SPSCC	Acquisitions
Skagit	Reclassifying fiction, inventory (prior sending data to Backstage for reclassification)
GHC	Acquisitions
BBCC	Fulfillment review
LWTECH	Audit of the current OA offerings in PCI

Primo Ranking of Blended Search Results

Search results ranking in Primo is sophisticated, and takes into account the type of search (keyword, title, author) and also where the matched term(s) appear in the title record.

In addition, ranking is affected by the scope searched, whether it is Alma only, PCI only, or both Alma and PCI (ie, blended searching). Typically, the default search scope in Primo is set to search everything (ie, Alma + PCI). So, patrons most often will see blended search results.

A reasonable overview of how Primo determines ranking in search results can be found here: https://knowledge.exlibrisgroup.com/Primo/Knowledge_Articles/Primo_Prime_Central_Searching_and_Search_Results_Evaluation

In the new Primo UI, the weighting of blended search results can be configured in the PBO. Since we are currently Total Care customers, changing blending settings requires a Sales Force ticket.

The blending settings in the PBO are described in the [Blending](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/060Back_Office_Guide/110Additional_Prime_Features/020Search_Engine_Configurations) section of this document: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/060Back_Office_Guide/110Additional_Prime_Features/020Search_Engine_Configurations

In mechanical terms, you can request via SF that your local (Alma) scope be boosted in importance. I don't have any specific recommendations for what the boosting should be. Results boosting is going to be an inexact science, affected by the type of search, the search terms used, and the contents of your local collection.

Based on the problem described today by Renton and Pierce, the desire would be to boost local collections in blended search results.

When opening an SF case on this topic, you can first ask in the case whether the blend settings for your local search engine match these recommended settings:

- Minimum hit rank for combining: **Medium**
- Combine Location: **Top**
- Number of Results to reward: **5**
- Constant factor: **4.0**

As described in this [ExLibris Blending Configuration Document](#).

If these settings are already in place, and you are not seeing the results you would like, you can work with ExLibris Support through the case to tweak settings until they give you the desired results. (Just be aware that search results boosting is an inexact science, and the search results as presented are greatly influenced by the search terms being used, the scopes being searched, and contents of both your local and PCI collections.)

This general issue has been visited previously in SF cases. For example:

Pierce College - 00412371

SPSCC - 00432579
Green River - 00392006
Edmonds - 00241146

In Primo VE, the preferred weighting of blended search results can be self-administered, as described in: [Configuring Boosting in Primo VE](#). So, once on Primo VE, you will be able to enjoy more immediate gratification with regard to changing results boosting.

Primo May Release

Based on the discussion above, I looked into February vs May Primo releases.

I discovered that our Primo environments are still running the February release, as can be seen in the PBO / About menu option.

I have alerted North American support that they seemed to have skipped our environment with the May 2018 release, and am waiting on word back for an update.

Open questions

deleting locations with no items?

New release testing? Particularly weighting search results in Primo

List of new Primo release testing scenarios

Primo VE certification

Both the self-paced training materials and the self-scheduled test are available now:
https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE/00_Primo_VE_Administration_Certification_Overview

Alma certification

For newly hired or existing staff wishing to complete Alma Certification over the summer, start [here](#).

Chat

00:08:50 Wade Guidry: <https://goo.gl/forms/9aEhhRF6y7UvppAY2>

00:09:20 Wade Guidry: agenda link:
https://docs.google.com/document/d/1q6hqZhX_ArYI1bMdn8RTGVINip7tYmfgTYY-pgwzJAw/edit?usp=sharing

00:10:30 Amy Herman - Olympic College: When is everyone else off contract? We are off June 19-July 1.

00:10:47 Traci Taylor - BTC: June 30th

00:11:01 elenabianco: I am off contract after June 15.

00:11:30 Lesley at Pierce: Yep

00:11:36 elenabianco: I am actually off contract all summer this year...

00:12:00 Nicole-Bellevue: I'm off June 19-30 but could make a meeting...

00:12:09 Amy Herman - Olympic College: I'm envious, Elena! :-)

00:15:56 Laura Staley - Renton Tech: No. I did the course materials.

00:16:15 John Anderson Big Bend: I went through the materials 3 times to make sure.

00:20:45 Laura Staley - Renton Tech: Renton is doing an inventory.

00:21:07 Laura Staley - Renton Tech: Since Alma, yes.

00:21:25 Laura Staley - Renton Tech: The whole collection.

00:21:34 Nadine -GRC: GRC is going to do inventory too

00:21:51 Nadine -GRC: not yet

00:21:53 Lesley at Pierce: Pierce is going to work on Reloan Limits. And based on what was learned at ELUNA, we'd like to improve:

- Letters
- Primo UI
- Electronic Resources

00:22:16 Nadine -GRC: we will try

00:22:40 Amy Herman - Olympic College: I'm hoping to have time to work on adding licenses.

00:22:58 Nicole-Bellevue: I want to get counter reports added in

00:23:11 Laura Staley - Renton Tech: Renton is also planning and working on our Alma letters. Our staff has many suggestions for improvements.

00:24:33 Traci Taylor - BTC: inventory, reloan limits, letters

00:24:53 Ryer Banta - Centralia College: Probably nothing too huge here at Centralia, but some clean up. Probably letter improvements.

00:24:53 Traci Taylor - BTC: IPEDS

00:25:24 charly.eaton: Alma certification

00:25:44 charly.eaton: EDCC

00:26:11 George Babcock -- Edmonds: Edmonds just completed a large weeding project so we will also be doing an inventory

00:26:36 Lily Kun: SPSCC is working on setting up Acquisitions

00:26:39 Elena Bianco - Skagit: We're reclassifying our fiction section, and have been already doing inventory prior to sending our data to Backstage Library Works.

00:28:16 Leslie Potter-Henderson, Shoreline: Shoreline - Weeding and Inventory, Primo VE?, database cleanup (Alma weirdnesses), training new staff (Debbie is retiring)

00:28:19 Traci Taylor - BTC: BTC is thinking about doing acquisitions, but a decision has not yet been made.

00:28:28 Amy Herman - Olympic College: Olympic is also doing an inventory at all three libraries

00:28:30 Cara Beth - Grays Harbor: At Grays Harbor, i will also be working on Acquisitions

00:29:13 Tammy Siebenberg (YVC): At Yakima I hope to clean up our electronic collections.

00:29:23 Shellie Whittaker - Consortium: Patron purge?

00:30:00 Ryer Banta - Centralia College: I also want to clean up location names and patron groups that are no longer in use, but have migrated from Voyager. Although I'm unsure if there are big drawbacks to this.

00:30:04 Shellie Whittaker - Consortium: Yes, I believe Big Bend will be doing a bit of this

00:30:13 John Anderson Big Bend: Yes we will.

00:30:21 Shellie Whittaker - Consortium: fulfillment rules review (BBCC)

00:31:52 Ryer Banta - Centralia College: Yes, it's those kind of analytic issues that could be messy. Thanks for your thoughts Kirsti.

00:33:51 Ryer Banta - Centralia College: Thanks for the side discussion on that.

00:40:53 Lesley at Pierce: This happened to Pierce today too!

00:42:46 Amy Herman - Olympic College: Perhaps they messed with the results display algorithm in the process of lowering the instances of book reviews?

00:46:11 Amy Herman - Olympic College: Wild conjecturing :-)

00:46:12 Lily Kun: Yes, my physical books are no longer at the top.

00:46:56 Traci Taylor - BTC: ours aren't at the top either

00:47:12 Laura Staley - Renton Tech: Will do.

00:47:17 Elena Bianco - Skagit: Agreed. I've got fewer of my local results up at the top. I wish I had saved a screen copy from a search prior to the change...

00:47:19 Amy Herman - Olympic College: Ours never were at the top. First 10 results still include at least two book results.

00:48:16 Laura Staley - Renton Tech: Yes. Great question.

00:48:20 Traci Taylor - BTC: That would be a great list.

00:49:25 Leslie Potter-Henderson, Shoreline: me too!

00:50:19 Amy Herman - Olympic College: Is weighting somethign we can tweak in VE? I'm thinking it's a proprietary algorithm they won't let us tweak ourselves...

00:52:11 Laura Staley - Renton Tech: For Renton - "tapas". We have several tapas books - they should appear first.

00:52:40 Traci Taylor - BTC: We definitely need to submit a case.

00:53:27 Traci Taylor - BTC: Lesley, can you share the case number?
00:53:44 Lesley at Pierce: Sure!
00:55:24 Traci Taylor - BTC: Thank you
00:56:51 Laura Staley - Renton Tech: Nothing here.
00:57:35 Traci Taylor - BTC: Thank you
00:58:06 Lesley at Pierce: Thanks!
00:58:07 Laura Staley - Renton Tech: Thanks, Wade. Bye, All.
00:58:08 Ryer Banta - Centralia College: Thanks Wade and all