



PRIMO VE RESEARCH ASSISTANT: FIRST IMPRESSIONS  
OCTOBER 31, 2024

Please complete the optional, anonymous Zoom poll about your library's plans for the Primo Research Assistant!

Anonymous results will be shared during this webinar.



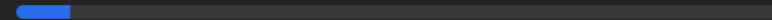
## Your library and the Primo Research Assistant

Poll ended | 1 question | 58 of 70 (82%) participated

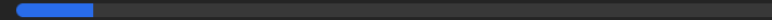
1. Is your library planning to use the Primo Research Assistant? (Single choice)

58/58 (100%) answered

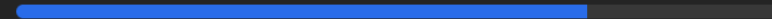
Yes, we've already activated the Research Assistant and it is live in our Primo VE instance. (4/58) 7%



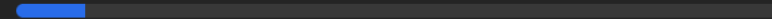
We are planning on activating the Research Assistant in our Primo VE in the near future. (6/58) 10%



We are unsure if we will be activating the Research Assistant. (43/58) 74%



We will not be activating the Research Assistant in the foreseeable future. (5/58) 9%



- Brief demonstration of the Research Assistant
- Overview of how to configure it
- Summary of how it works and where the sources come from
- Open Discussion

# Primo Research Assistant

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# What is it?

- ExLibris's generative AI and retrieval-augmented generation (RAG) search.
- Requests patrons ask a question about a topic using natural language. The tool then converts this language into a Boolean search and searches the CDI for results.
- It returns a topic summary in response to the search with text generated from resource abstracts, the five most “relevant” sources with links to them, and suggested research questions.

# Activating the Research Assistant

Configuration -> Discovery -> Display Configuration -> Configure Views -> [Edit view] -> General Attributes -> **Enable Research Assistant Using Icon/Widget**

The screenshot shows the ExLibris configuration interface for Columbia College Chicago. The page is titled 'View Configuration' and is under the 'General Attributes' section. The interface includes a sidebar with navigation options: Alma Production, Acquisitions, Resources, Discovery, Fulfillment, User Management, General, and Analytics. The main content area contains various settings for the discovery interface, including time-out URLs, timeout settings, side bar position, and various enable/disable checkboxes. Two green arrows point to the 'Enable Research Assistant Using Widget' and 'Enable Research Assistant Using Icon' checkboxes, both of which are checked.

Setting	Value/Status
Time-out URL	https://library.colum.edu/
Timeout (in minutes) for signed in users *	15
Timeout (in minutes) for guest users *	15
Default Language *	English
Side bar (Tweak my results) position	On the left
Select as Default View	<input type="checkbox"/>
Enable Collection Discovery Features	<input checked="" type="checkbox"/>
Newspapers Search Filter By Availability	<input checked="" type="checkbox"/>
Related records display	<input checked="" type="checkbox"/>
Enable Edit My Library Card	<input checked="" type="checkbox"/>
Enable recent scopes search	<input type="checkbox"/>
Display Unpaywall Links	<input type="checkbox"/>
Display Favorites Warning Message for Guests	<input type="checkbox"/>
Use normalized CDI subjects	<input type="checkbox"/>
Display CDI document attributes	<input type="checkbox"/>
Enable Research Assistant Using Widget	<input checked="" type="checkbox"/>
Auto Complete Enabled	<input type="checkbox"/>
Enable the 'Personalize Your Results' service	<input checked="" type="checkbox"/>
Display link to Newspapers Search	<input checked="" type="checkbox"/>
Highlight reference entry on top	<input type="checkbox"/>
Use Voice Search	<input checked="" type="checkbox"/>
Set focus on search box	<input type="checkbox"/>
Enable QR On Top	<input checked="" type="checkbox"/>
Display all links in View Online section	<input type="checkbox"/>
Enable Barcode Search	<input type="checkbox"/>
Allow direct login to other institutions	<input type="checkbox"/>
Enable Research Assistant Using Icon	<input checked="" type="checkbox"/>

# Activating the Research Assistant

Configuration -> Discovery -> Display Configuration -> Configure Views -> [Edit view] -> General Attributes -> Enable Research Assistant Using Icon/Widget

The screenshot displays a library website interface. At the top, a dark blue navigation bar contains several menu items: 'RESEARCH ASSISTANT BETA' (with a star icon), 'NEW SEARCH', 'ASK A LIBRARIAN', 'INTERLIBRARY LOAN', and a dropdown menu. A green arrow labeled 'Icon' points to the 'RESEARCH ASSISTANT BETA' icon. Below the navigation bar is a search bar with the text 'fashion' and a dropdown menu set to 'Everything at Columbia'. To the right of the search bar are icons for a microphone and a magnifying glass, and the text 'ADVANCED SEARCH'. The main content area is divided into several sections. On the left, there are filters for 'Refine your results', 'Expand My Results', 'Sort by Relevance', 'Availability', and 'Resource Type'. The central area features two 'LIBRARY GUIDE' cards: 'Fashion Studies' and 'Sustainable Design'. Below these is an 'ABOUT THE TOPIC' section titled 'Introduction' with a text snippet and a 'Full text available' link. At the bottom, there is a search results list showing a book titled 'Fashion' by Susan M. Freese, published in 2011, with an 'Available Online' link. On the right side of the page, there is a vertical blue widget labeled 'RESEARCH ASSISTANT BETA' with a star icon. A green arrow labeled 'Widget' points to this vertical bar.



# Changing the display labels

*Configuration -> Discovery -> Display Configuration -> Labels -> Research Assistant Labels*

*Configuration -> Discovery -> Display Configuration -> Labels -> Research Assistant Search Screen Labels*

**Columbia LIBRARY**  
COLLEGE CHICAGO

RESEARCH ASSISTANT **BETA** NEW SEARCH ASK A LIBRARIAN RESEARCH GUIDES ... Belongea, Andrew

**Primo Research Assistant** **BETA**

Start a new topic

**Research history**

who are the most influential ambient musicians in...

**who are some influential ambient musicians**

Searching for relevant resources  
Generating overview for 5 most relevant sources

**Overview**

Ambient music has been shaped by influential musicians such as Pauline Oliveros, La Monte Young, Terry Riley, Max Neuhaus, Alvin Lucier, Cornelius Cardew, Philip Glass, and Brian Eno <sup>1</sup>. These experimental composers of the sixties and seventies explored music as a means of engaging in a dialogue with nature, creating decentralized physical phenomena that integrated sounds into natural systems <sup>1</sup>. They sought to find a voice for human society in nature, influenced by Indian classical music and the raga form <sup>1</sup>.

Does "relevant" mean here what patrons think it does?

# Research Assistant content scope

[ExLibris Documentation](#) (Scroll to “Content Scope”)

*“We use the entirety of CDI metadata and abstracts with the following exceptions:”*

# Exceptions

- News content (Newspaper articles, Newsletters, Text resources).
- Collections that are not marked as “free for search” in the CDI collection list (subscription A&I databases).
- Sources with insufficient metadata and abstracts to effectively run the tool.
- Documents marked as withdrawn or retracted; retraction notes.
- Any collections from the following content providers: APA, DataCite, Elsevier, JSTOR, Conde Nast.
- Any content published by the providers above coming via aggregator collections.

## Nota bene

*“These details will be updated regularly as some content providers are in active discussions with their stakeholder groups about GenAI tools.”*

# Limitations: “Overview of Sources”

- Not full-text based—the majority of overview text comes from abstracts and descriptions
- Summaries exclude books, ebooks, and full text of articles—you’re getting a limited window into the content which results in cursory summaries
- Includes resources to which a user might not have access
- Conversely, results—at this—point often don’t include resources a user does have access to
- Local, specialized collections are not included.

## **Additionally:**

- The Overview may include some NZ sources

## Limitations: “View More Results”

- Boolean translation is limited to extended OR queries

**Additionally:**

- “View More Results” is expanded by default

# Boolean construction

(vitamin D deficiency impact on health) OR (effects of low vitamin D levels on overall well-being) OR (health consequences of vitamin D deficiency) OR (relationship between vitamin D deficiency and overall health) OR (impact of inadequate vitamin D on overall wellness) OR (Effects of vitamin D deficiency on general health) OR (Consequences of low vitamin D levels on overall well-being) OR (Impact of inadequate vitamin D on overall health) OR (Health implications of vitamin D insufficiency) OR (Significance of vitamin D deficiency on overall health) OR (How does vitamin D deficiency impact overall health?)

- For those who have enabled Research Assistant in your Primo VE, what has been your experience with it?
- If you haven't enabled Research Assistant in Primo VE, why not?
- What makes the Research Assistant useful? What are its benefits?
- What are the drawbacks of the Research Assistant?
- How does this tool fit in with the AI policies at your institution?



Ex Libris Primo Research Assistant FAQ:

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Materials/001\\_Next\\_Discovery\\_Experience\\_\(NDE\)/Primo\\_Research\\_Assistant](https://knowledge.exlibrisgroup.com/Primo/Product_Materials/001_Next_Discovery_Experience_(NDE)/Primo_Research_Assistant)

Ex Libris Getting Started with Primo Research Assistant:

[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/Primo\\_VE\\_\(English\)/015\\_Getting\\_Started\\_with\\_Primo\\_Research\\_Assistant](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/015_Getting_Started_with_Primo_Research_Assistant)

Ex Libris Video on the Research Assistant (6 mins):

[https://exl-edu.com/02\\_Primo/How\\_To/Primo\\_Research\\_Assistant/](https://exl-edu.com/02_Primo/How_To/Primo_Research_Assistant/)

CARLI's Primo VE Views documentation to set up a Test View:

[https://www.carli.illinois.edu/products-services/i-share/discovery-interface/primove\\_views](https://www.carli.illinois.edu/products-services/i-share/discovery-interface/primove_views)

