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5 Things for a Primo VE Transition

Hopkins, Peta J.

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5 Things for a Prim o VE Transition

Peta Hopkins, Bond University
ANZREG 2019 – Best Practice Day



TIMELINE

23 Jan 2019

Transition kicks off –
access to Primo VE



27 Apr 2019

Primo VE launches –
students and staff seem
blissfully unaware of the
change



Now

Still have one or two
things on our mind



What are the 5 Things



BLANK SLATE
Thinking about the
big picture



FRBR & DEDUP
Challenging our
thinking



LEGANTO
Making the most of
new integrations



FEATURES
Aligning the
features sets



**EXTERNAL
RESOURCES**
Importing records



BLANK SLATE

- Philosophy for approaching technology changes – thinking about opportunities
- Consider the big picture – new Interlibrary loan platform will only work with Primo VE
- Time to consider if customisations are still useful, relevant



OpportUNITY



learning

FRBR & DEDUP

- Unusual groupings
 - Tools for analysis
- Just run the job on very large sets
 - Log a case

KB Article

[Understanding the Dedup and FRBR Processes \(Primo VE\)](#)

KB Article

[Dedup and FRBR Analysis Tool for Primo VE](#)

KB Article

[Suppressing Groups of Records from Dedup/FRBR for Primo VE](#)

LEGANTO

COGNITIVE LOAD

Leganto My Collection & Primo VE
Pinned Records are unified – but
not quite seamless

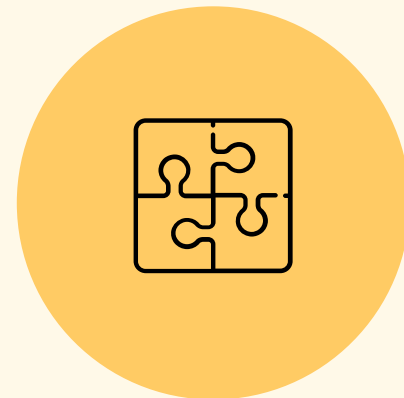
CONSISTENT EXPERIENCE ?

Consider Primo dedup experience compared
to Leganto experience – ebook and physical
book holdings links attached to a single
citation.

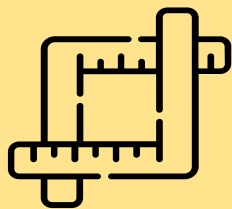
Primo enables multi-word labels, but Leganto
only supports single-word tags – idea is
“Planned”

FAVOURITE

Simple to save records in Primo
then within Leganto easily add them
to lists



inteGRATED



FEATURES

alignMENT

What's Critical for us/you?

- Review SF cases – some became irrelevant, some low priority we were happy to relinquish
- Check the rest against the feature alignment schedule – could we tolerate the wait?
- Review any new issues found in testing Primo VE against the schedule

KB Article

[Feature Alignment Schedule for Primo VE](#)

Q1–
Q3

Completed
10 features completed

Q4

Expected

- Exposure to web engines – Google (December)
- Virtual browse to include ebooks (December)
- Full text indexing for Alma-D items (December)

2020

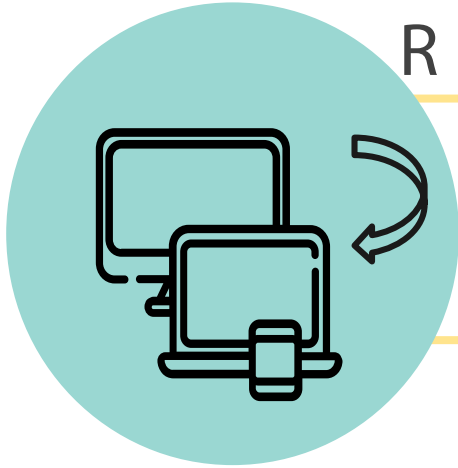
Planned

- Dedup/FRBR key configuration
- Facets for LC classification
- Search prefilters on Alma and entire data source
- Search by holdings records data

As at 17 October 2019



EXTERNAL RESOURCES



Qualified DC

Default namespace format in oai_dc was not supported. Had to use generic XML. For our Pure research repository.

Testing Tip

Do not use test files with reserved characters – download the xml file from the OAI-PMH server, don't just copy/paste from the browser.

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KB Articles

[Loading Records from External Sources into Primo VE](#)

2

Training Packages

[In Primo VE Certification](#)

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Bonus tidbits

	Surprise!	OK	Be Prepared
Redirection	If you do not have a custom URL, redirection will not be possible		Get a report from the LMS of any direct links to Primo
OpenURL in Google Scholar		After Go Live, update the base URL in the GS publishing profile	
Punctuation	Some fields containing punctuation display strangely. Digital rep labels only when logged in.		Consider renaming affected collections eg. nature.com
Sign In Experience			Test It – it is different – especially with silent login enabled – styling was tricky using a direct link via authentication.
Custom resource icons			Icon file names should contain the exact code of the local resource type

THANK YOU

Does anyone have any questions?

phopkins@bond.edu.au

 @petahopkins

library.bond.edu.au



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