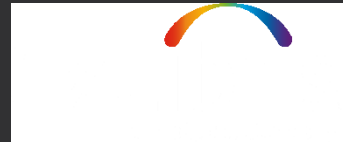


# Introducing Primo VE: Streamline Back-end Administration

ELUNA 2018

Laura Guy, Systems Librarian,  
Colorado School of Mines

Jessie Ransom, Solutions Architect,  
Ex Libris

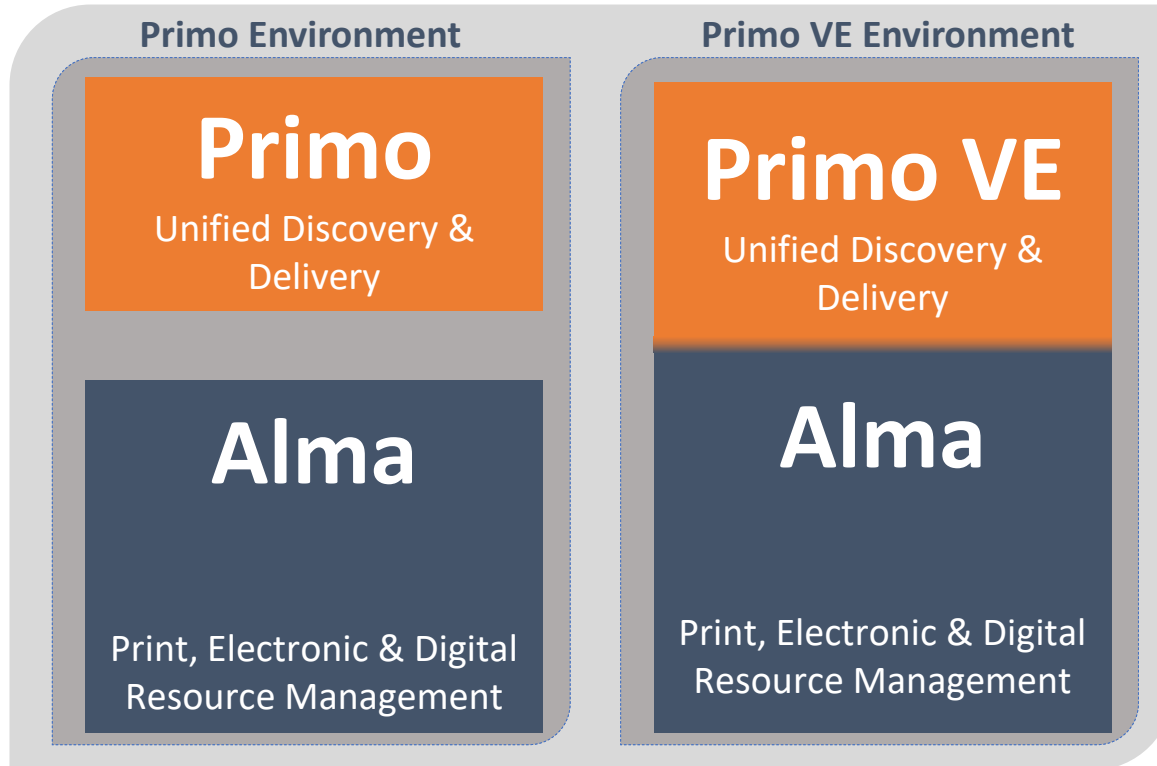


# Agenda

---

- What is Primo VE?
- Experiences at Colorado School of Mines
- Primo VE Demo
- Migrating to Primo VE
- Questions

# What is Primo VE?



# Okay, But Really, What is “VE”

By coincidence...

“Visum et Expisco” = “View and Discover”

# Back Office Management

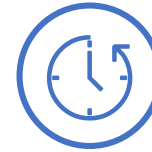
Simplifying & expediting library workflows through a unified back office management of Primo and Alma



Reduction of duplicated admin processes



Seamless publishing processes



Real-time discovery of records created in Alma



Improved product implementation process



Easier configuration and setup



Monthly releases synced with Alma release cycle

# Experience at Colorado School of Mines



<https://hdl.handle.net/11124/172207>

 **COLORADO SCHOOL OF MINES**

# Who We Are

- STEM University
- One campus and one library
- 25 staff; 1 Systems Librarian (me!)
- 7000 patrons
- 600,000 P & 900,000 E titles
- Primo **Total Care** Customer since 2012
- Primo VE Development Partner (live 6/17)

# What's Great About Primo VE

- Streamlined Publishing Processes
- Manage Alma and Primo in One Place
- Task Oriented Workflows
- Primo Sandbox
- Easy and Powerful UI Customization Tools
- Improved Patron Display
- Primo Analytics
- Continuous Innovation

# Simplified Publishing Processes



# Real-time Discovery of Records

### CBEN110

Course Code: CBEN110    Course Name: FUNDAMENTALS OF BIOLO...    Instructors: RAMEY, C  
Section: A    Processing Department: Course Unit    Number of participants: 0

Reading List Information

Code: CBEN110  
Name: CBEN110  
Due Back Date: 05/11/2018  
Owners: -

Citations   Owners   Notes

Alerts: All   Citation/Locate Status: All   Material Type: All   Tags: All  
Citation Last Modification Date: [ ]

1 Campbell Biology in Focus  
Book By Urry, Cain, Wasserman, Minorsky, Jackson, Reece  
Request Status: Complete  
Resource Locate Status: Resource Locate  
Copyright Status: Not Determined

Alerts   Physical (1)   Electronic   Digital   Citation Details

**BOOK**  
**Campbell Biology in Focus**  
Urry, Cain, Wasserman, Minorsky, Jackson, Reece  
Available at Arthur Lakes Library Course Reserves - Front Desk (Floor 2) (CBEN 110) >

Send to [ ]

SEND TO  
EXPORT BIBTEX   EXPORT RIS   EASYBIB   ENDNOTE   REFWORKS   PRINT   CITATIO

GET IT

VIRTUAL BROWSE

RELATED LINKS

DETAILS

TAGS

Get It [ ]

Please sign in to check if there are any request options. Sign in

LOCATION AND ITEM INFORMATION  
Arthur Lakes Library  
Available , Course Reserves - Front Desk (Floor 2) CBEN 110  
(4 copies, 4 available, 0 requests)

# Alma “Display in Discovery”

Physical titles ▾ Keywords ▾ wild minds 🔍 Advanced ▾

Physical Titles (1 - 4 of 4) wild minds Save Query

Institution Community

Sort by Rank Expand ↕ ⚙️

- 1 Wild minds : what animals really think / Marc D. Hauser ; illustrations by Ted Dewan.  
Book By Hauser, Marc D. (New York : Henry Holt 2000.)  
Edition: 1st ed. Language: English Orders: 1  
ISBN: 0805056696 (hbk. : alk. paper)

Physical (1) Other details

- 2 A people's history of wilderness / edited by Matt Jenkins.  
Book By Jenkins, Matt. (Paonia, Colo. : High Country News 2000.)

Physical (1) Other details

**BOOK**  
Wild minds : what animals really think  
Hauser, Marc D.  
2000

Available at Arthur Lakes Library Book Stacks (Floor 2, 2M, & 3) (QL785 .H359 2000) >

Send to

GET IT

VIRTUAL BROWSE

RELATED LINKS

DETAILS

TAGS

Please sign in to check if there are any request options. Sign in

LOCATION AND ITEM INFORMATION

Arthur Lakes Library  
Available, Book Stacks (Floor 2, 2M, & 3) QL785 .H359 2000  
(1 copy, 1 available, 0 requests) LOCATE

Item in place  
Loanable

- Edit Record
- Holdings
- ...
- Items
- Order
- Request
- Publishing information
- Linked Data
- Add Representation
- Add Reminder
- Display in Discovery

# Single Back Office Management

Hi folks:

We need to modify the pickup location choices in our PRIMO catalog. Where is the table to add/remove these choices – in ALMA admin or PRIMO?

Thanks.

---

Douglas M. Stehle

Dept. Head, Access Services. MLIS.

Assistant Professor. Building Administrator V-23 Library.

Office phone: 303-724-2139



Health Sciences Library

UNIVERSITY OF COLORADO  
ANSCHUTZ MEDICAL CAMPUS

Follow our library on social media!



# Discovery Configuration in Alma

The screenshot shows the Alma web interface with the 'Discovery' menu open. The menu items are:

- Search Configuration
- Search Profiles
- Display Configuration
- ★ Configure Views
- Manage Local Fields
- Manage Tags
- ★ Labels
- Other
  - Resource Recommender Configuration
  - Central Index and proxy set-up

The background interface includes a navigation bar with 'Acquisitions', 'Resources', 'Discovery', 'Fulfillment', 'Admin', and 'Analytics'. A 'Welcome, GUY, LAURA' message is visible. A 'Recent Pages' section lists 'Configure Views' and 'ab'. A 'Tasks' section lists '6 Purchase Requests', '1 Other Requests', '3470 Order Lines', '3 Invoices', and '6 Electronic Resources'. A 'Publishing Jobs List' section shows 'Starting Time: 12/26/2017 08:00:00 AM', 'Status: Completed Successfully', and 'Type: Incremental'. A 'Number of Print and Electronic volumes held' section shows a table with 1,918,549 total volumes held.

Print	Electronic	Total
640,920	859,345	1,918,549

# Task Oriented Workflows

< Back to Alma



Alma Configuration



Configuring

Colorado School of M

Filter List

Look-up or select



Acquisitions

Resources

Discovery

Fulfillment

User Management

General

## Search Configuration

Search Profiles

Restricted Search Groups

## Display Configuration

Configure Views

Manage Local Fields

Local Resource Types

Manage Tags

Display Items

Labels

## Request Configuration

Digitization Request

Hold and Booking Request

Purchase Request

Resource Sharing Request

## Authentication

User Authentication

Restricted User Groups (Central

Index / Ebsco)

## Loading External Data Sources

Normalization rules for External  
Data sources

Test Normalization Rules

Normalization Process Task

Discovery Import Profiles

## Other

Resource Recommender

Configuration

Central Index and proxy set-up

Primo Deep-Link Re-Redirect

Configuration

Suppress Dedup/FRBR

Customer Settings

# Loading External Data Sources

Alma Sandbox

Acquisitions Resources Discovery Fulfillment Admin Analytics

Users All

Import Profile Details

Save Draft Cancel Save

Profile Details Normalization Delivery

Profile Details

Profile name \* LIBGUIDES

Profile description Mines Library Guides

Data Source Code \* LIBGUIDES

Data Source Label \* Mines Library Guides

Originating system \* Other

Import Protocol OAI

Physical source format XML

Source format OAI DC Format

Status Active

File name patterns

Target format Dublin Core

# Primo Sandbox

Alma  
Sandbox



Acquisitions

Resources

Discovery

Fulfillment

Admin

Analytics



< Views List

Cancel

1 - 2 of 2

+ Add View



	Code ↕	Name ↕	Description	Default View	
1	01COLSCHL_INST:BRZNTTEST	BRZNTTEST	Browzine Test View	<input type="radio"/>	...
2	01COLSCHL_INST:MINES	Mines	Mines test production view	<input checked="" type="radio"/>	...

# Simplified UI Setup

The main interface shows the configuration for the view '01COLSCHL\_INST:MINES'. The 'View Name' is 'Mines'. The 'Links Menu' tab is selected, and two orange arrows point to it from the top right. Below the tabs are sections for 'Define View' and 'General Attributes'.

**Define View**

- Code: 01COLSCHL\_INST:MINES
- Description: This is the production view to use

**General Attributes**

- Time-out URL: http://library.mines.edu
- Timeout (in minutes) for signed in users: 30
- Side bar (Tweak my results) position: On the left
- Select as Default View:
- Enable Collection Discovery Features:
- Timeout (in minutes) for guest users: 0
- Default Language: English
- Auto Complete Enabled:
- Enable the 'Personalize Your Results' service:

The inset window shows the navigation menu with the following items:

- NEW SEARCH
- FIND E-JOURNALS
- FIND DATABASES
- FULL-TEXT FINDER
- SUGGEST A PURCHASE
- ASK A LIBRARIAN
- Mines Library
- Just Articles
- Institutional Repository
- EBSCOHost
- Course Reserves
- Library Home
- Prospector (regional ca)
- Google Scholar

# View UI Customizations Instantly

The screenshot shows the 'View Configuration' page in the Alma Sandbox interface. The top navigation bar includes 'Acquisitions', 'Resources', 'Discovery', 'Fulfillment', 'Admin', and 'Analytics'. The main content area has tabs for 'General', 'Links Menu', 'Search Profile Slots', 'Advanced Search Configuration', 'Brief Results', 'Brief Record Display', and 'Full Record Services'. The 'Manage Customization Package' section is active, showing options to 'Download Package' (Template View and Current View) and 'Upload Package'. An orange arrow points from the 'Upload' button in the 'Upload Package' section to a preview table of files. The 'Upload Logo' section is also visible with an 'Upload' button and a 'Remove Logo' button. The 'Logo Clickable URL' is set to 'http://library.mines.edu'.

Manage Customization Package

Download Package

Template View Customization Package

Current View Customization Package

Upload Package

Customization Package

Upload Logo

Upload Logo File

Logo Clickable URL

Name	Date modified	Type
css	1/20/2018 6:21 AM	File folder
html	7/17/2017 11:26 AM	File folder
img	7/17/2017 11:26 AM	File folder
js	1/20/2018 6:20 AM	File folder

# Open Discovery Framework

Join GitHub today

GitHub is home to over 20 million developers working together to host and review code, manage projects, and build software together.

Sign up

Dismiss

add an altmetrics widget to the primo full view

11 commits   1 branch   0 releases

Branch: master   New pull request   Find file

noamamit92 add npm

css	initial commit
js	initial commit
.gitattributes	Added .gitattributes & .gitignore files
.gitignore	Added .gitattributes & .gitignore files
README.md	Update README.md
package.json	add npm

README.md

Adding an altmetrics widget to the Primo full view

Tags

ADD YOUR OWN TAGS

TOP

SEND TO

VIEW ONLINE

RELATED LINKS

DETAILS

TAGS

CITATIONS

Citations

Find 2 available sources citing this

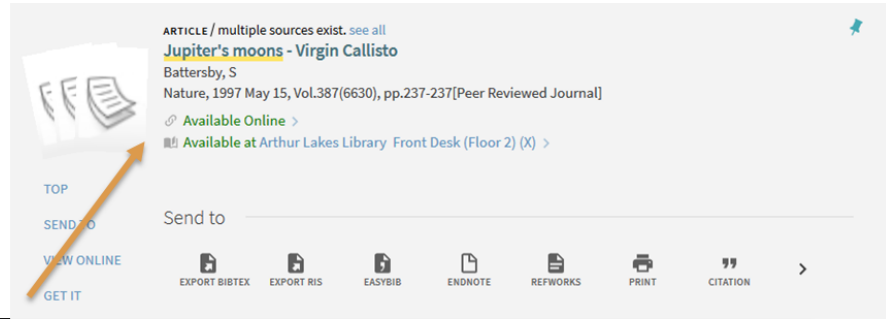
Social Popularity Statistics (AltMetrics):

36

- Picked up by 1 news outlets
- Blogged by 1
- Tweeted by 27
- On 1 Facebook pages
- Mentioned in 4 Google+ posts

See more details

# Primo Central Index Integration



ARTICLE / multiple sources exist. [see all](#)  
**Jupiter's moons - Virgin Callisto**  
Battersby, S  
Nature, 1997 May 15, Vol.387(6630), pp.237-237[Peer Reviewed Journal]  
[Available Online >](#)  
[Available at Arthur Lakes Library Front Desk \(Floor 2\) \(X\) >](#)

TOP  
SEND TO  
VIEW ONLINE  
GET IT

Send to

EXPORT BIBTEX EXPORT RIS EASYBIB ENDNOTE REFWORKS PRINT CITATION >

15



ARTICLE / multiple sources exist. [see all](#)  
**Jupiter's moons - Virgin Callisto**  
Battersby, S  
Nature, 1997 May 15, Vol.387(6630), pp.237-237[Peer Reviewed Journal]  
[Available Online >](#)  
[Available at Arthur Lakes Library Front Desk \(Floor 2\) \(X\) >](#)

ProQuest Materials Science & Engineering Database  
Available from 1990  
Most recent 1 year(s) not available

SciTech Premium Collection  
Available from 1990  
Most recent 1 year(s) not available

# Enhanced Item Display

Full Item Display

Restore [Share] [Settings]

Active	Item cell code	Item fields to display	Display label	
<input checked="" type="checkbox"/>	item.global.dataitem.1	Alternative Call number	Additional call number	...
<input checked="" type="checkbox"/>	item.global.dataitem.2	Public note	Note	...
<input checked="" type="checkbox"/>	item.global.dataitem.3	Material type	Material Type	...
<input checked="" type="checkbox"/>	item.global.dataitem.4	Library Location Call number	Location	...
<input checked="" type="checkbox"/>	item.global.dataitem.5	Item barcode	Barcode (staff use only)	...
<input type="checkbox"/>	item.global.dataitem.6	-	NOT_DEFINED	...
<input type="checkbox"/>	item.global.dataitem.7	-	NOT_DEFINED	...
<input type="checkbox"/>	item.global.dataitem.8	-	NOT_DEFINED	...
<input type="checkbox"/>	item.global.dataitem.9			
<input type="checkbox"/>	item.global.dataitem.10			
<input type="checkbox"/>	item.global.dataitem.11			
<input type="checkbox"/>	item.global.dataitem.12			

**LOCATION AND ITEM INFORMATION**

Arthur Lakes Library  
**Available**, Book Stacks (Floor 2, 2M, & 3) QL785 .H359 2000  
(1 copy, 1 available, 0 requests)

[LOCATE](#) [Menu]

---

Item in place  
Loanable

Material Type: BOOK  
Location: Arthur Lakes Library Book Stacks (Floor 2, 2M, & 3) QL785 .H359 2000  
**Barcode (staff use only): U188004881149**

[Up Arrow]

# User Friendly Display

**BOOK**

**Colorado and mining : a strengthening relationship.**

Colorado Mining Association.  
1978

Available at Arthur Lakes Library Mining History Archive - See Front Desk (Floor 2) (TN24.C6 C5698 1978) and other locations >

TOP

SEND TO

GET IT

VIRTUAL BROWSE

RELATED LINKS

DETAILS

TAGS

Send to

EXPORT BIBTEX EXPORT RIS EASYBIB ENDNOTE REFWORKS PRINT CITATION EMAIL PERMALINK

Get It

REQUEST: [Request It](#) / [Digitize It](#)

**LOCATIONS:**

Arthur Lakes Library  
Available, Mining History Archive - See Front Desk (Floor 2) ; TN24.C6 C5698 1978 [LOCATE](#) >

Arthur Lakes Library  
Out of library , Book Stacks (Floor 2, 2M, & 3) ; TN24.C6 C5698 1978 [LOCATE](#) >

# Discover External Data Sources

The image shows a library catalog record for a 'TEXT RESOURCE' titled 'KIC BookEdge Scanner' by 'Guy, Laura', dated '2017-08-22 17:19:56'. The record is marked as 'Available Online'. A sidebar on the left contains navigation options: TOP, SEND TO, VIEW ONLINE, RELATED LINKS, DETAILS, and TAGS. Under 'VIEW ONLINE', there are icons for EXPORT BIBTEX, EXPORT RIS, EASYBIB, and ENDNOTE. Under 'RELATED LINKS', the 'Mines Library Guides' link is highlighted with an orange box. An orange arrow points from this link to an inset window showing the 'ARTHURLAKES LIBRARY' website. The website page is titled 'KIC BookEdge Scanner: Get Started' and includes a search bar and a section titled 'State-of-the-Art Scanner Available' with a photograph of the scanner interface. The scanner interface shows options to 'Scan', 'Save to USB or Send E-mail', and a 'KIC' logo.

TEXT RESOURCE  
**KIC BookEdge Scanner**  
Guy, Laura  
2017-08-22 17:19:56  
[Available Online >](#)

TOP  
SEND TO  
VIEW ONLINE  
RELATED LINKS  
DETAILS  
TAGS

Send to

EXPORT BIBTEX EXPORT RIS EASYBIB ENDNOTE REFWORKS PRINT CITATIO >

View Online

Full text availability

**Mines Library Guides**

Related Links

Mines Library Guides >  
Display Source Record >

ARTHURLAKES LIBRARY  
COLORADO SCHOOL OF MINES

Arthur Lakes Library | Library Guides | How To Guides | KIC BookEdge Scanner | Get Started

KIC BookEdge Scanner: Get Started

New State-of-the-Art Scanner

State-of-the-Art Scanner Available

Be sure to check out our Technology Fee-funded KIC scanner (next to the OrePrint printers) in the computing lab during your next visit to the Library. Please give it a try and let us know what you think.

Scan KIC Save to USB or Send E-mail

# Easily Create Specialized Views

The screenshot displays the Alma library system interface. At the top, the Alma logo and navigation menu are visible, including links for Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. Below the navigation, the 'Views List' section shows a list of 8 views. An orange arrow points from the 'Mines Theses' view (code 01COLSCHL\_INST:MinesTheses) to a preview window of that view.

**Views List:**

Code	View Name
1	01COLSCHL_INST:Auto1
2	01COLSCHL_INST:Production4
3	01COLSCHL_INST:Ropeway
4	01COLSCHL_INST:MINES
5	01COLSCHL_INST:TellEntl
6	01COLSCHL_INST:EBooks
7	01COLSCHL_INST:MinesTheses
8	01COLSCHL_INST:Test

**Mines Theses View Preview:**

The preview window shows the 'Mines Theses' page with the Colorado School of Mines logo. It features a search bar with the placeholder text 'Search anything' and a magnifying glass icon. Below the search bar, there is a section titled 'Search for Mines Senior Papers, Theses and Dissertations.' with links for 'Research Help', 'Find Services', 'Ask a Librarian', and 'Staff Directory'. Other sections include 'Library Home', 'Prospector (regional catalog)', 'Google Scholar', 'WorldCat', 'Request It', and 'Connect with us:' with social media icons for Twitter, Facebook, LinkedIn, Instagram, and Pinterest. At the bottom, there are links for 'Library Home', 'ILLiad', and 'Report an Access Problem'.

## Mines library launches new thesis search interface

Posted: October 2, 2017



The Mines library has launched a new specialized interface to help students, faculty and staff explore theses and senior papers.

# Primo Analytics

Analytics

★ Design Analytics

★ Design Analytics (Primo)

Subscribe to Analytics

Analytics Objects

Analytics Objects List

Analytics User Statistics

Analytics Citation Attribute Types

Institutional Analytics Profile

Reports

Acquisitions Dashboard

E-Inventory Dashboard

Fulfillment Dashboard

Industry Statistics Dashboard

Link Resolver Dashboard

Physical One Time Dashboard

Shelflist (Prompted)

Usage Dashboard

Usage via COUNTER Dashboard

Data available as of:  
12/26/2017 02:17:37 MST

Data updated as of:  
12/25/2017 17:00:00 MST

# Monthly Upgrade Cycle

2017



Primo VE December 2017 Release Notes - HF

Primo VE December 2017 Release Notes

Primo VE November 2017 Release Notes - HF



Primo VE November 2017 Release Notes


Primo VE September 2017 Release Notes - HF

Primo VE September 2017 Release Notes

Primo VE August 2017 Release Notes

# See it in Action

< Back to Alma  Alma Configuration 

Configuring **Alma University**  

**Acquisitions**

**Resources**

**Discovery**

**Fulfillment**

**User Management**

**General**

**Analytics**

**Search Configuration**

- [Search Profiles](#)
- [Restricted Search Groups](#)

**Display Configuration**

- [Configure Views](#)
- [Manage Local Fields](#)
- [Local Resource Types](#)
- [Manage Tags](#)
- [Display Items](#)
- [Labels](#)

**Request Configuration**

- [Digitization Request](#)
- [Hold and Booking Request](#)
- [Purchase Request](#)
- [Resource Sharing Request](#)

**Authentication**

- [User Authentication](#)
- [Restricted User Groups \(Central Index / Ebsco\)](#)


**Loading External Data Sources**

- [Normalization rules for External Data sources](#)
- [Test Normalization Rules](#)
- [Normalization Process Task](#)
- [Discovery Import Profiles](#)

**Other**

- [Resource Recommender Configuration](#)
- [Central Index and proxy set-up](#)
- [Primo Deep-Link Re-Direct Configuration](#)
- [Suppress Dedup/FRBR](#)
- [Dedup and FRBR Test Utility](#)
- [Customer Settings](#)

**Demo**

 © Ex Libris, a ProQuest Company, 2018

# VE Rollout Plan

## New Alma-Primo customers

New Alma-Primo implementations, including consortia

## Existing Alma-Primo Customers

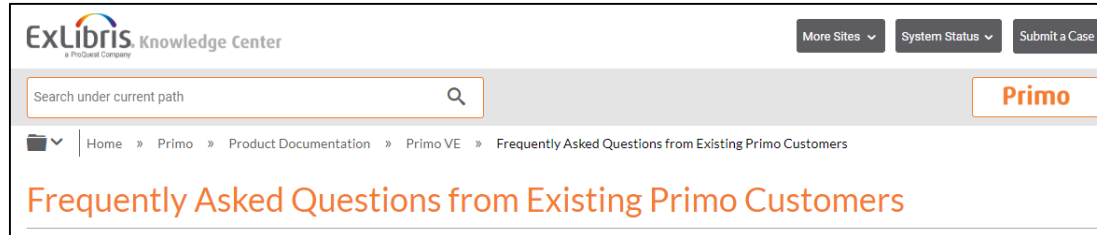
Seamless transition for patrons:  
Same new Primo UI | Same Primo Central index  
Email [URD\\_Delivery@exlibrisgroup.com](mailto:URD_Delivery@exlibrisgroup.com)

From 2018

Beginning mid-2018

## What can we expect?

Set up the VE environment in parallel to your existing Primo  
Go live when you're ready, traffic will be redirected to Primo VE  
No system downtime or impact on the end user



The screenshot shows the ExLibris Knowledge Center interface. At the top left is the logo "ExLibris Knowledge Center" with "a ProQuest Company" below it. To the right are three buttons: "More Sites" with a dropdown arrow, "System Status" with a dropdown arrow, and "Submit a Case". Below this is a search bar with the placeholder text "Search under current path" and a magnifying glass icon. To the right of the search bar is a "Primo" button. Below the search bar is a breadcrumb trail: "Home » Primo » Product Documentation » Primo VE » Frequently Asked Questions from Existing Primo Customers". At the bottom of the screenshot, the title "Frequently Asked Questions from Existing Primo Customers" is displayed in orange text.

Questions?



**THANK YOU**

[LGuy@mines.edu](mailto:LGuy@mines.edu)

[Jessie.Ransom@exlibrisgroup.com](mailto:Jessie.Ransom@exlibrisgroup.com)

