Introducing Primo VE:
Streamline Back-end Administration
ELUNA 2018

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Colorado School of Mines

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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?

**Primo Environment**
- **Primo**
  - Unified Discovery & Delivery
- **Alma**
  - Print, Electronic & Digital Resource Management

**Primo VE Environment**
- **Primo VE**
  - Unified Discovery & Delivery
- **Alma**
  - Print, Electronic & Digital Resource Management
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
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

DANGER
MOVING
PARTS
Real-time Discovery of Records

CBEN110
Course Code: CBEN110
Course Name: FUNDAMENTALS OF BIOLOGICAL ENGINEERING
Instructors: RAMEY, C
Number of participants: 0

Reading List Information

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

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
GET IT
VIRTUAL BROWSE
RELATED LINKS
DETAILS
TAGS

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”
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!
Task Oriented Workflows

Loading External Data Sources
- Normalization rules for External Data sources
- Test Normalization Rules
- Normalization Process Task
- Discovery Import Profiles
Loading External Data Sources

Profile Details
- Profile name: LIBGUIDES
- Profile description: Mines Library Guides
- Data Source Code: LIBGUIDES
- Data Source Label: Mines Library Guides
- Import Protocol: OAI
- Physical source format: XML
- Source format: OAI DC Format
- Status: Active

Normalization and Delivery
<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
<th>Description</th>
<th>Default View</th>
</tr>
</thead>
<tbody>
<tr>
<td>01COLSCHL_INST:BRZNTEST</td>
<td>BRZNTEST</td>
<td>Browzine Test View</td>
<td></td>
</tr>
<tr>
<td>01COLSCHL_INST:MINES</td>
<td>Mines</td>
<td>Mines test production view</td>
<td></td>
</tr>
</tbody>
</table>
Simplified UI Setup

- **View Name**: Mines
- **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**: checked
  - **Enable Collection Discovery Features**: checked
- **Links Menu**:
  - **New Search**
  - **Find E-Journals**
  - **Find Databases**
  - **Full-Text Finder**
  - **Suggest a Purchase**
  - **Ask a Librarian**
- **Search Profile Slots**
- **Advanced Search Configuration**
- **Brief Results**
View UI Customizations Instantly

Download Package
- Template View Customization Package
- Current View Customization Package

Upload Package
- Customization Package

Upload Logo
- Upload Logo File
- Logo Clickable URL: http://library.mines.edu

Files:
- css
- html
- img
- js
- Date modified: 1/20/2018 6:21 AM, File folder
- Date modified: 7/17/2017 11:26 AM, File folder
- Date modified: 7/17/2017 11:26 AM, File folder
- Date modified: 1/20/2018 6:20 AM, File folder
Open Discovery Framework
Primo Central Index Integration
### Enhanced Item Display

**Full Item Display**

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

**LOCATION AND ITEM INFORMATION**

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

- **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
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.

Send to

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
Easily Create Specialized Views
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.
<table>
<thead>
<tr>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primo VE December 2017 Release Notes - HF</td>
</tr>
<tr>
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<tr>
<td>Primo VE November 2017 Release Notes - HF</td>
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<td>Primo VE September 2017 Release Notes - HF</td>
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<tr>
<td>Primo VE August 2017 Release Notes</td>
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See it in Action
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

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
Questions?
THANK YOU

LGuy@mines.edu

Jessie.Ransom@exlibrisgroup.com