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## 5 Things for a Primo VE Transition

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# 5 Things for a Prim o VE Transition

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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

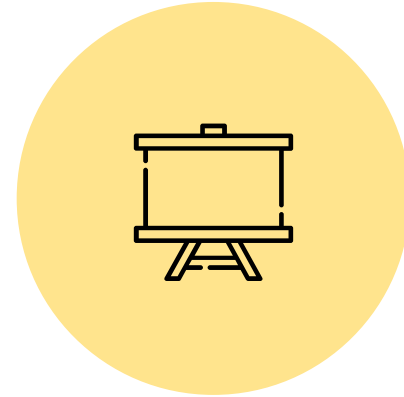


**EXTERNAL  
RESOURCES**  
Importing records



## 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

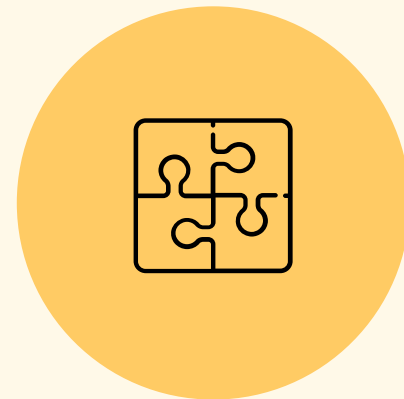
## CONSISTENT EXPERIENCE ?

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

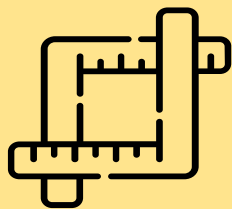
Primo enables multi-word labels, but Leganto  
only supports single-word tags – idea is  
“Planned”

## 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**

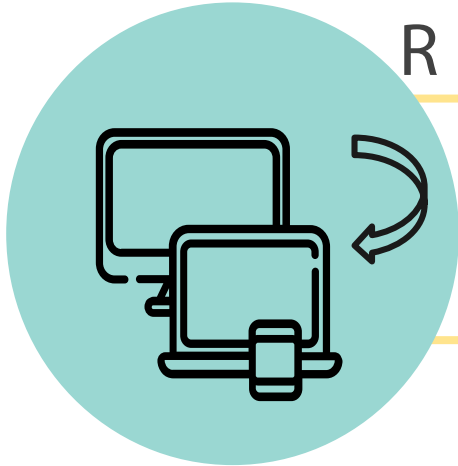
- Dedup/FRBR key configuration
- Facets for LC classification
- Search prefilters on Alma and entire data source
- Search by holdings records data

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](#)

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## 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 <a href="#">GS publishing profile</a>	
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?

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