Edinburgh Move to Primo-VE

Quickly put together…. 4th May 2021.

History of Primo-VE at Edinburgh

- Edinburgh University were early adopter testers for Primo-VE. But we're still on Primo back office.

- We've been discussing the migration for a couple of years.

- We haven't moved more quickly because we didn't see an obvious benefit to the user. Weighing that against, what were at the time, unfixed issues.

- Most of the issues we reported are resolved. I'll come on to unresolved ones in a moment.

- Our switch over is planned for 8th June

Benefits of moving to VE

o immediate publishing from Alma

o Backoffice moves into Alma interface

o We only have to worry about one upgrade slot for all our ExLibris services

o And we only need to monitor one set of alerts.

o The 'backend' is certainly a bit less complicated than Primo-BO

o And we're hoping to have more staff doing Primo-VE certification and be able to help with support.

Primo-VE concerns

Concerns we still have over a couple of issues:

Deduping of Physical and E records.

- At the moment when we have a physical and electronic record for the same book the records are deduped in Primo and the user sees a single record with physical and electronic holdings.
- The way dedupe currently works in VE means that not all print and electronic records for the same book dedupe – some form FRBR groups.
- At present it is not possible for clients to customise the dedup rules, as it is in BO Primo.
- This has implications for the display of holdings for items that are added to Leganto reading lists.
- Fix for this is slated for Q4 this year – so after our go live date.

Slowness –

- We've been told by ExLbiris that the slowness will go away after go live. Once searches   start coming in. Other Primo-VE sites we have contacted have confirmed this.
- We're planning to look at running jMeter against the interface – theory being it may improve go live response times.

- **All other issues we have worked through – so to us Primo-VE is a much better product than when we started looking at it.**

Other issues for migration

- **On migration – Saved Searches will not migrate** – so you need to give your patrons a heads up to save their details prior to the move.

- We plan to use Alma letters to contact a set of patrons to warn them.

- ExLibris sent us a file with those saved searches and patron IDs

- We ran this against Alma analytics to get a contact mail

- We plan to run a mailshot for Alma. One now and one a week before the move.

- And we will keep a database of the Saved Searches/Patron IDs for a short time in case anyone does need their saved search information sent on.

Migration planning

1. **Dependencies** – we have integrations in our Student/Staff portal; VLE; main website; we have integrations with Fine Payment systems (WPM); we have a 24/7 alerting service (in house) which runs searches against our Primo interface and checks e-journals. Some involve Puppet staged services so need more co-ordination.

2. **Communications** – it's a fine balance between just enough information and too much. So we've created a page with full details and plan to link from Primo and e-mail comms to the new service.

3. **Writing new FAQs for Helpdesk staff**

4. **Explaining how to save and re-add saved searches and alerts (**we still have the mails we sent when we migrated from Voyager to Alma in 2015 – and the process is pretty much the same.

5. **Explaining the slight changes in search functionality (**e.g. loss of A-Z list, changes to being able to filter on electronic vs print up front**.**

Final slide

- Switch over will be a DNS change and a reduction in TTL on the day.

- And we will have the old interface for one month after Primo-VE go live.

- You need to schedule your upgrade with ExLibris.

- There are plenty of really good webinars on the Exlibris Knowledge Centre

- We're not worried about the upgrade at all.

- Contact – alex.forrest@ed.ac.uk and g.andrew@ed.ac.uk

- Questions? Discussion?