

# MIGRATING TO PRIMO VE IN A PANDEMIC WITH A SHARED ILS: WHAT COULD POSSIBLY GO WRONG?

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# Overview

What we are covering today:

## Introductions

Who are your presenters

## Setting the Scene

Consortial Structure and Pandemic Impacts

## Considerations

How the Decision was made to migrate. Reviewing Impacts to Norm Rules, Dedup and FRBR, Shifting work from Network to Institution and loss of resources.

## Challenges

Issues with non-parity between PBO and VE and additional unexpected issues



# Meet your Presenters:



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# Setting the Scene

Overview of our consortial structure and the Pandemic impacts at the institution level

# Our Consortium: Orbis Cascade Alliance

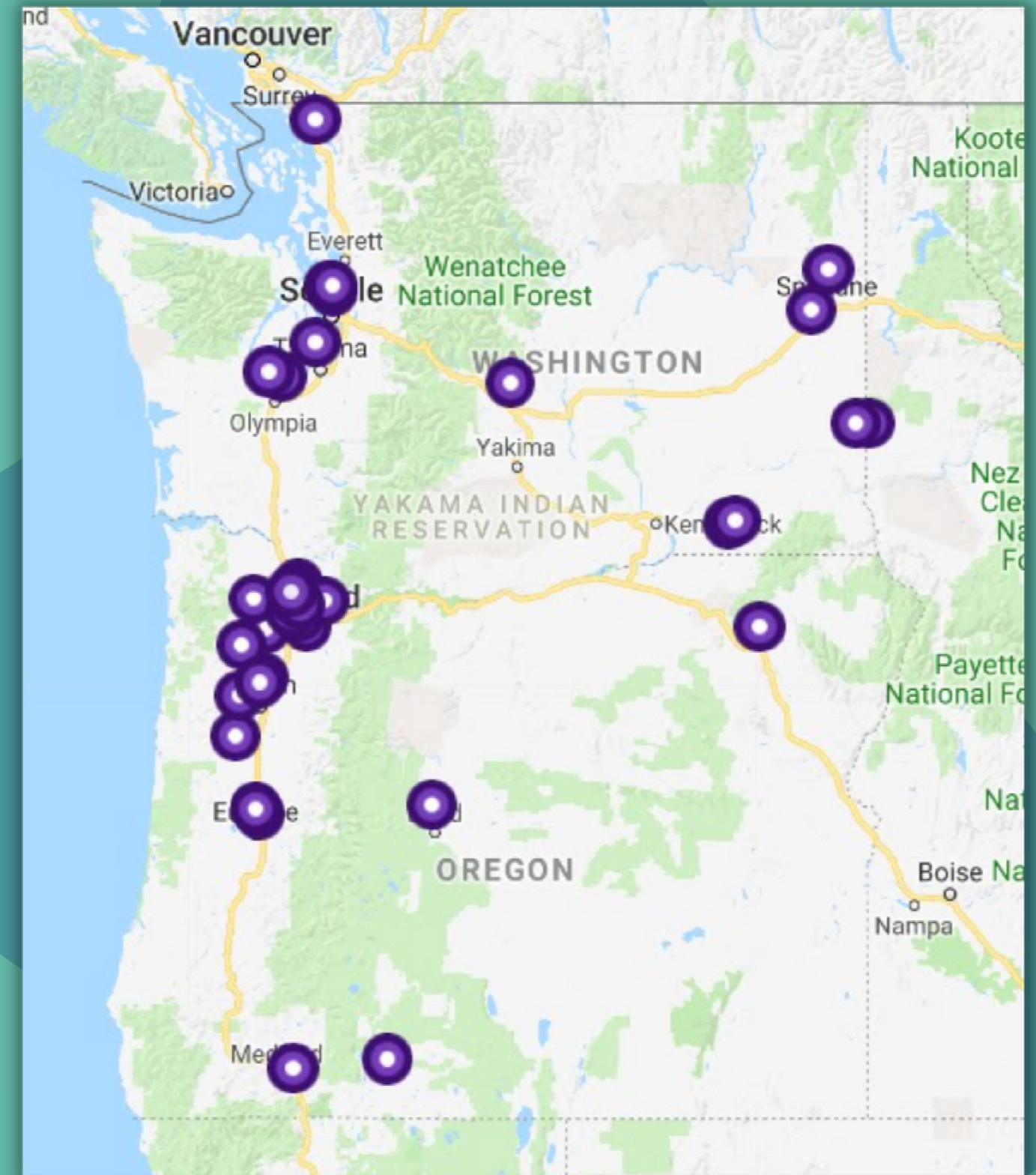
## 38 Members

Private & Public Colleges, Universities,  
Community Colleges in Oregon,  
Washington and Idaho

## 5 Program/Team Areas

Teams are based on the Program Areas which  
consist of:

- Diversity & User Experience
- Resource Sharing & Fulfillment
- Shared Content & Technical Services
- Systems
- Unique & Local Content



# Pandemic Impacts

Staffing changes, burnout and a shift to more virtual meetings...

## Staffing Changes

Facing the great resignation and losing key staff. Losing institutional history and knowledge. Doing more with a lot less...

## Burnout

General sense of burnout throughout the consortium and within institutions. Volunteers for teams and groups at an all time low.

## Virtual Meetings

Losing the ability to meet in person as an institution and as a consortium. Less participation as a result of losing physical meetings.

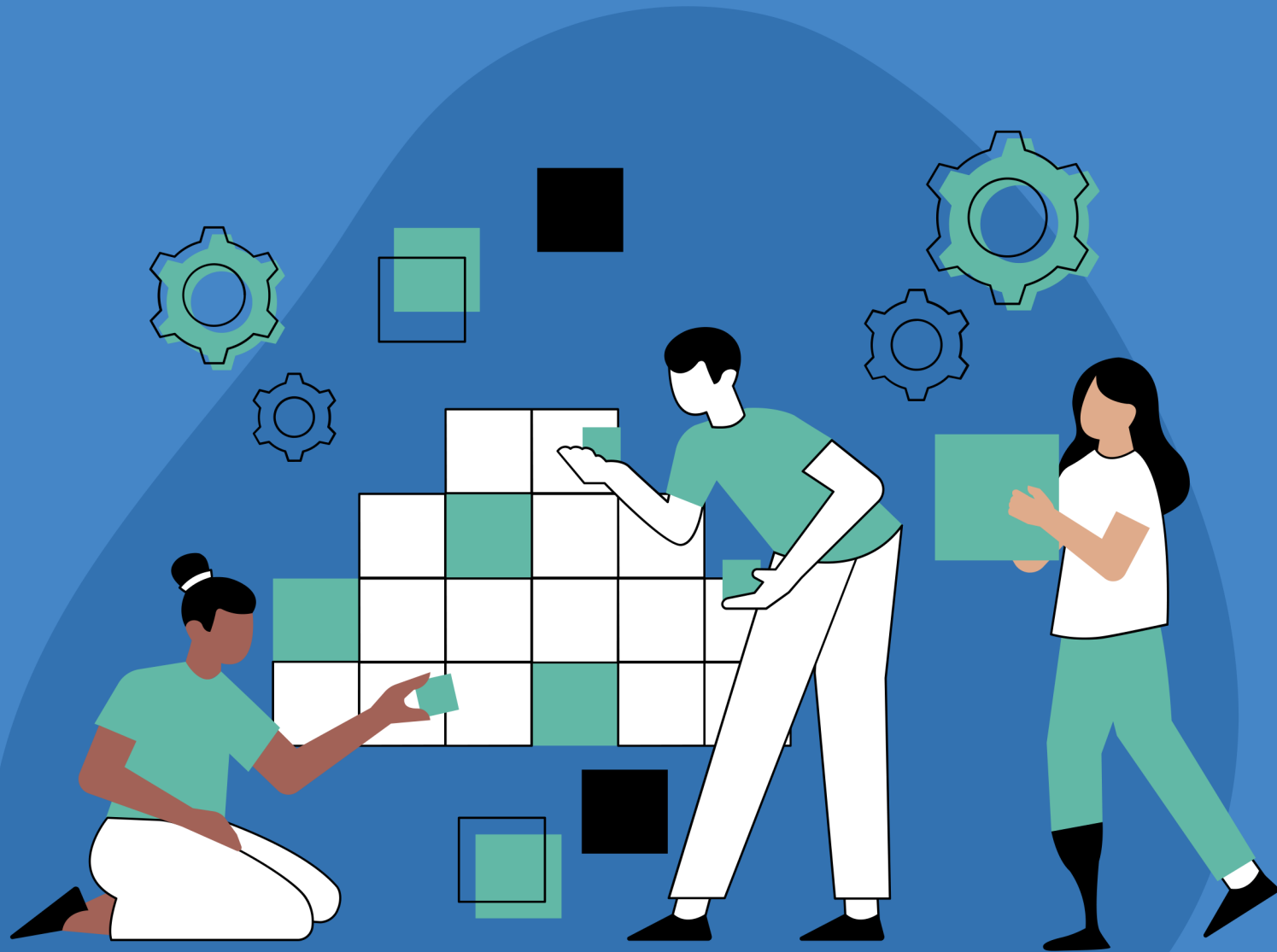




# Considerations in Migrating to VE

Reviewing Impacts to Norm Rules, Dedup and FRBR, Shifting work from Network to Institution and loss of resources.

# Considerations



## Normalization Rules (NR)

In the Primo Back Office (PBO) all NR were centrally managed by the Network Zone manager. VE you can only centrally distribute and manage local fields.

## Dedup & FRBR

In PBO both were consortial responsibilities. Now this work has shifted to the individual institutions to manage.

## Goodbye Primo Sandbox

Under the PBO each member institution had their own Primo sandbox they could use for experimentation. Now in VE only those with Alma Premium Sandboxes have Primo Sandboxes. In our consortium we only have 6 premium sandboxes--4 open to other members and 2 closed to only the individual institution



# Deciding to Migrate

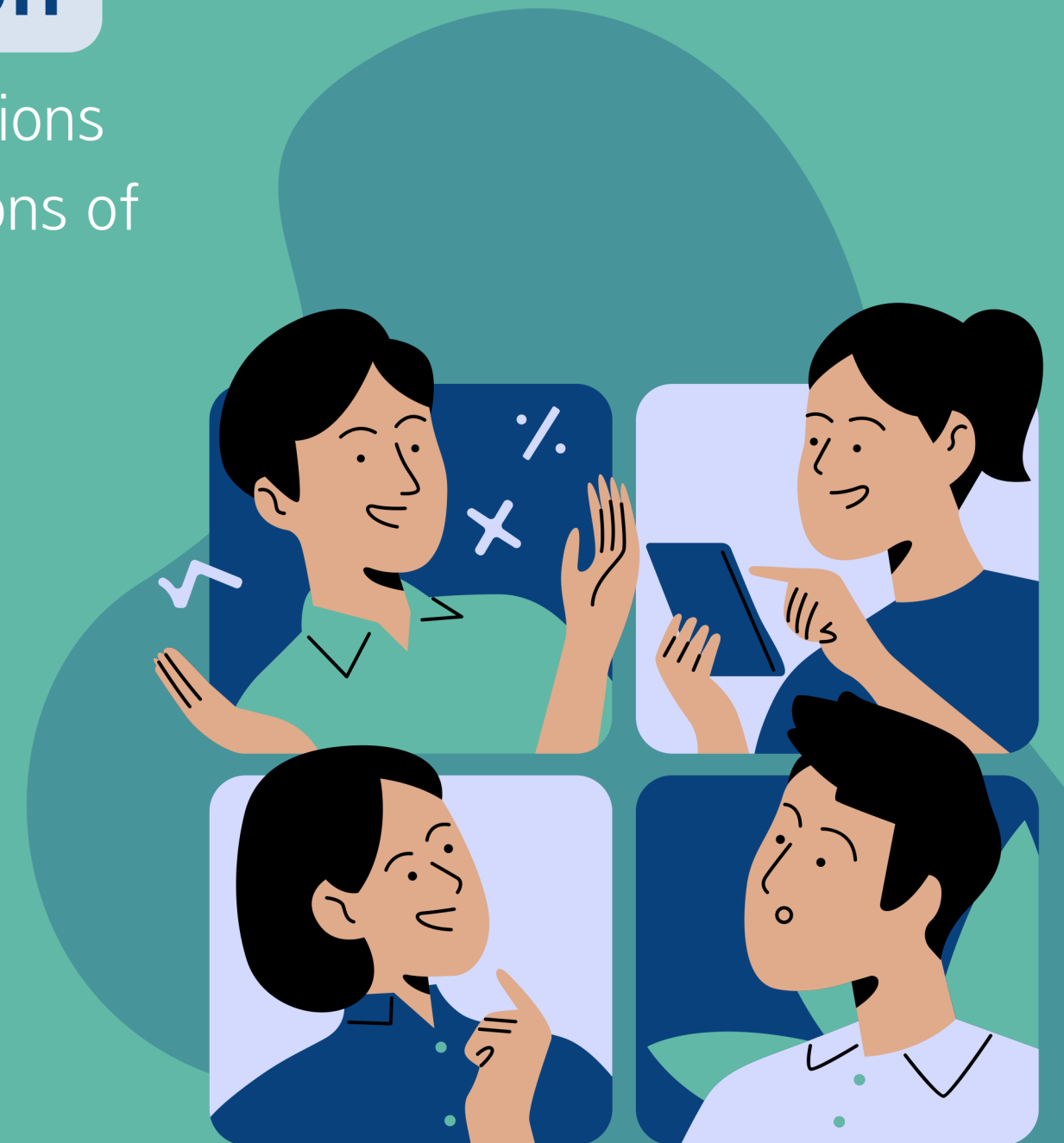
## Consortium Decisions

The main question being Is this even something we should consider doing at the consortial level? Does VE have what we need to function as a consortium?

Each institution had to vote twice, once via a systems representative to own the migration project and once via a Council member (Dean's are Council members on the Consortium board).

## Institutional Decision

Discussions at individual institutions were held to discuss pros and cons of migrating, timing and the effort required at the institution level.





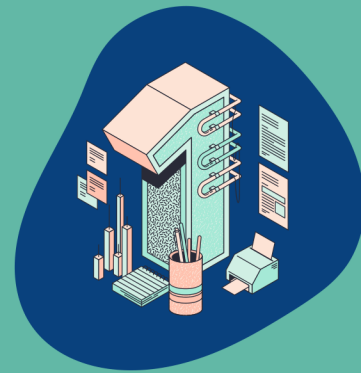
# Challenges with Migration

# Issues with Non-Parity

## Local Resource Type Configuration

Is not as robust as PBO configurations which led to significant changes in the services we have been able to offer our patrons.

## Limitations in this Area



**Limited Number of Local Resource Types**



**No Longer can Assign Multiple Resource Types**



**No Longer can Edit Out of Box Resource Type Rules**

# ENHANCEMENT REQUEST #7790

## Remove limit of Locally Defined Resource Types

Local resource types allow us to configure additional resource types for our users to discover and represent our holdings more accurately. However, we can only define a maximum of 20 local resource types. We request that the limit on the number of locally defined resources be removed or substantially increased.



# ENHANCEMENT REQUEST #7790

## Ability to Assign Multiple Resource Type Facets/Pre-Filters Single Record

We can assign only one resource type facet and/or pre-filter to a record, which is very limiting for resources that fall into multiple categories (conference proceedings on ebook, dissertations on audio CD, collections of archival materials that consist of images, etc.). We want to be able to do this for both records with a local display resource type and those using an OTB display resource type.

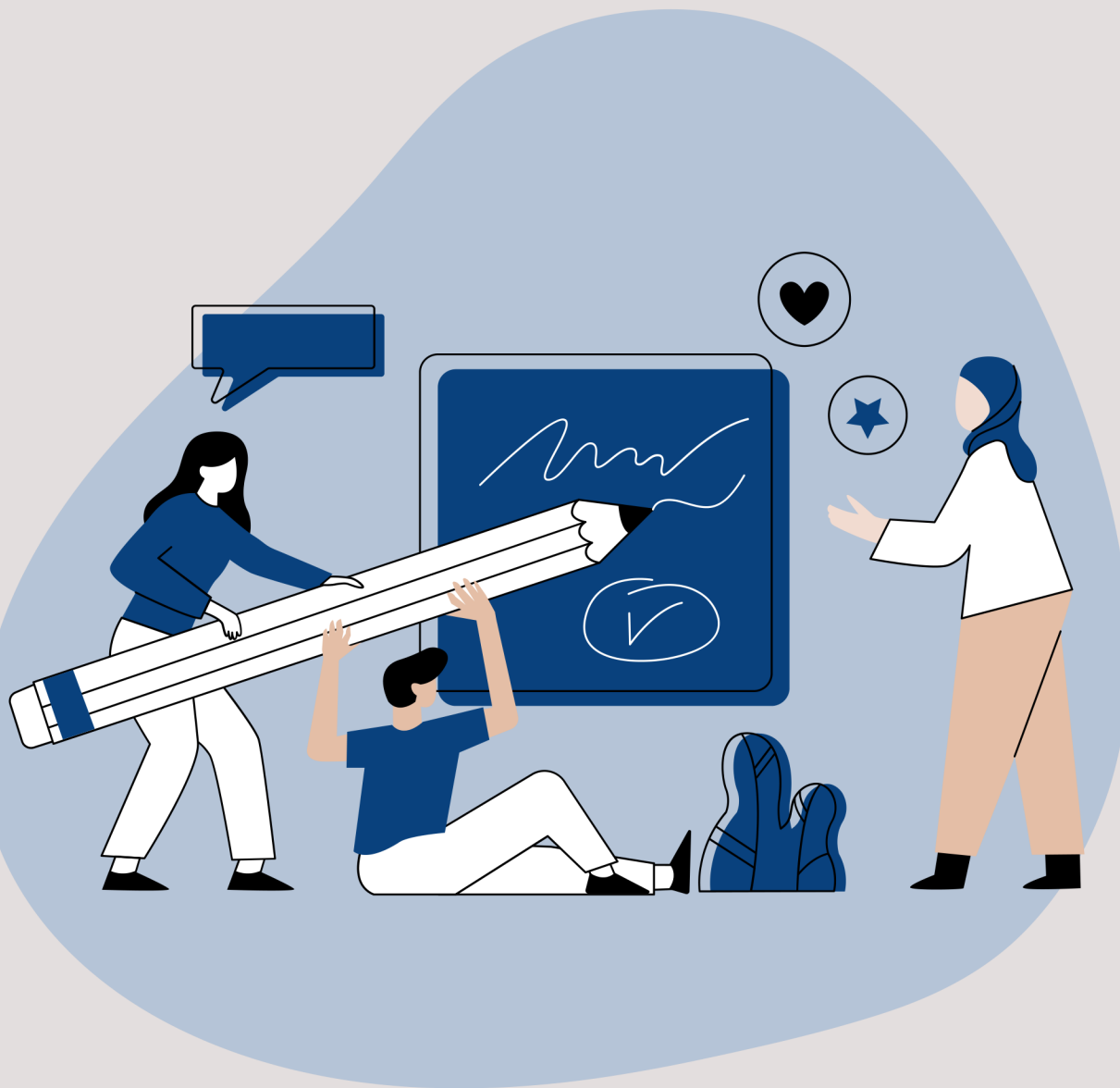
Currently, the inability to create a secondary local resource type of Government Documents is most problematic.

The screenshot displays a search interface with a search bar containing 'gov doc' and a dropdown menu showing 'Articles, Books, and More'. Below the search bar, there are filters for 'All items' and 'anywhere in the record'. A banner message reads: 'On July 12, our buildings re-open, ending [HathiTrust ETAS](#). Learn more about [usin](#)'. The search results section shows '0 selected' and '5 Results'. The first result is a 'MICROFORM' titled 'Space Station Workstation Technology Workshop report' with a publication date of 1986 and a 'Check holdings' link. The second result is a 'CD/DVD-ROM' titled 'ISCCP, central archive, catalog of data and products' compiled and edited by Katherine B. Kidwell and Daniel R. Poltar, published by the Climatic Data Center. The 'Active filters' section on the left includes 'Government Documents', 'Maps', 'Microform', 'Images', and 'CD-ROM/DVD-ROM', along with 'Remember all filters' and 'Reset filters' options.

# ENHANCEMENT REQUEST #7790

## Ability to Edit Out of Box Resource Type Rules

Ability to edit the OTB resource type rules in Primo VE in order to include or exclude certain types of records from said rules. For example, for certain textual integrating resources that users are likely to think of as books (such as some open textbooks), we use conditions based on the presence of form/genre headings to add them to the OTB "book" display type in Primo Back Office. Some institutions would like to exclude monographic series from the OTB "book" rule. Others would like to be able to remove conditions related to 007, since these often refer to accompanying material. Providing flexibility in this way will allow institutions to categorize materials to meet the needs of their local users.



# Issues with Non-Parity



## Network Zone Resource Types Rank/Boost

When attempting to use Resource Types from the Network Zone in ranking or boosting resources it results in errors and buggy behavior.

## 856 Links can't NR

In the PBO, we were able to create several "local linking fields" for display based on the second indicator values in MARC 856 field. Each second indicator value was used to generate a separate local linking field which allowed our members to turn off links with undesirable second indicators. For most Alliance institutions, 856 data with second indicators not=0 (Resource) were not desired for display.

## Indexing Issues Galore

After initial Go-Live for our entire consortium EVERY institution experienced a wide range of issues with records due to initial indexing issues at Go-live. Causing institutions to spend weeks troubleshooting issues with our patrons to figure out we all needed to be reindexed AGAIN.

# Issues with Non-Parity



## Can't NR Location Scopes

Previously in PBO you were able to create location scopes using NR for nested locations (locations within other libraries). We previously had our Special Collections scoped separately even though it is located in the basement of our main library Suzzallo.

## No Inventory Handling

Consortial members that have locations or items non-requestable in Primo VE it will show those items as available but no requesting link or link to alternative methods like interlibrary loan. GES is being ignored completely.

## No Division of Admin Roles /Lack of Granularity

There is a lack of division between Primo administration and General Alma administration roles. Also a lack of granularity that was previously in PBO that would allow for parsing of responsibilities.



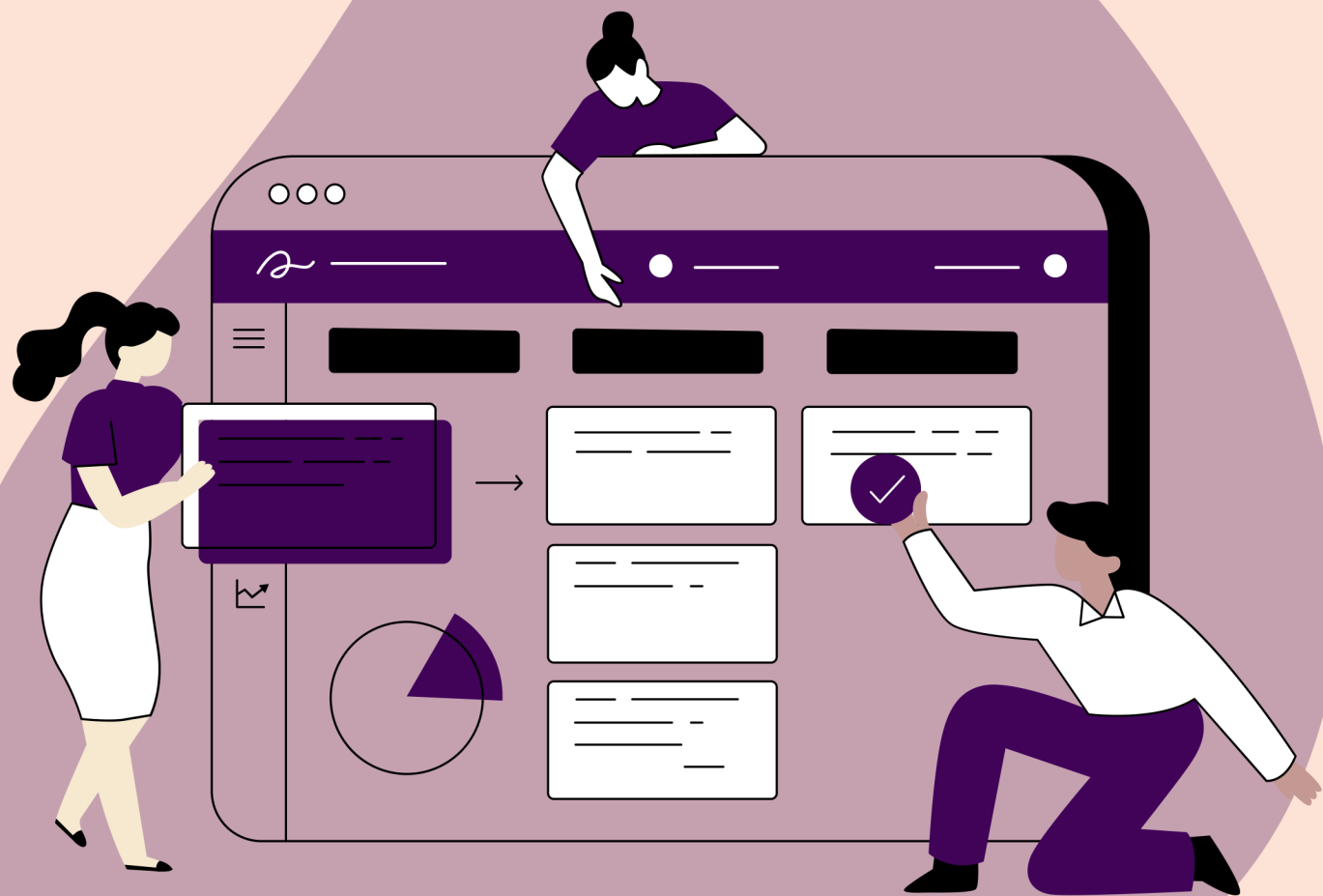
# Issues with Non-Parity

## Expanding Fields in Getit/Viewit

The previous version of the viewit and getit had all information displayed by default. In Primo VE, it has moved to minimize by default functionality and forces the patron to find the expand toggle if they want to see more information. However, patrons don't know they are missing any information. There should be an ability beyond a customization to expand by default as this is clearly a usability issue.

## No MMSID Numbers

MMSID numbers are commonly used for troubleshooting purposes in our consortium to quickly spot Network Zone or Institutional issues with records. This field for some reason was completely removed in Primo VE. Our Primo Customization Standing Group had to create a customization to bring this functionality back for us. This shouldn't have to be a customization as this is a clear parity issue.



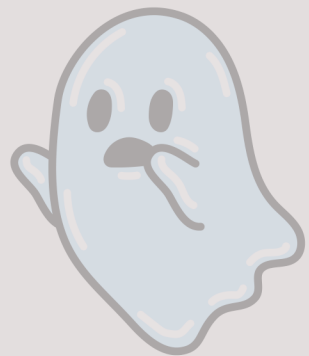
# General Post Migration Issues

## Individual Institution Resource Types Overriding NZ Records

Records that are network-linked, should have the resource type assignment be calculated based on the network-level data, as indicated in Primo VE's resource type documentation. The assignment of this record's URL as a collection-level URL by one member of our consortium - which is an inventory setting made at the IZ level - should NOT cause the assignment of this resource

## Being Ghosted by Migration Staff after Go-Live

Migration staff stopped answering Basecamp messages after our consortium was migrated. We still have a number of issues hanging from the initial migration that we have given up on them responding to and have resorted to waiting on Salesforce cases which is less than ideal.



# Conclusions

**Despite these challenges, the transition to VE offered many benefits**

## **No more Primo Back Office!**

Move away from Primo Back Office was a blessing for discovery admins and for the Normalization Rules Standing Group (with some painful caveats)

## **Faster Record Updates**

New records and updates to records were much faster

## **Changes to Publishing**

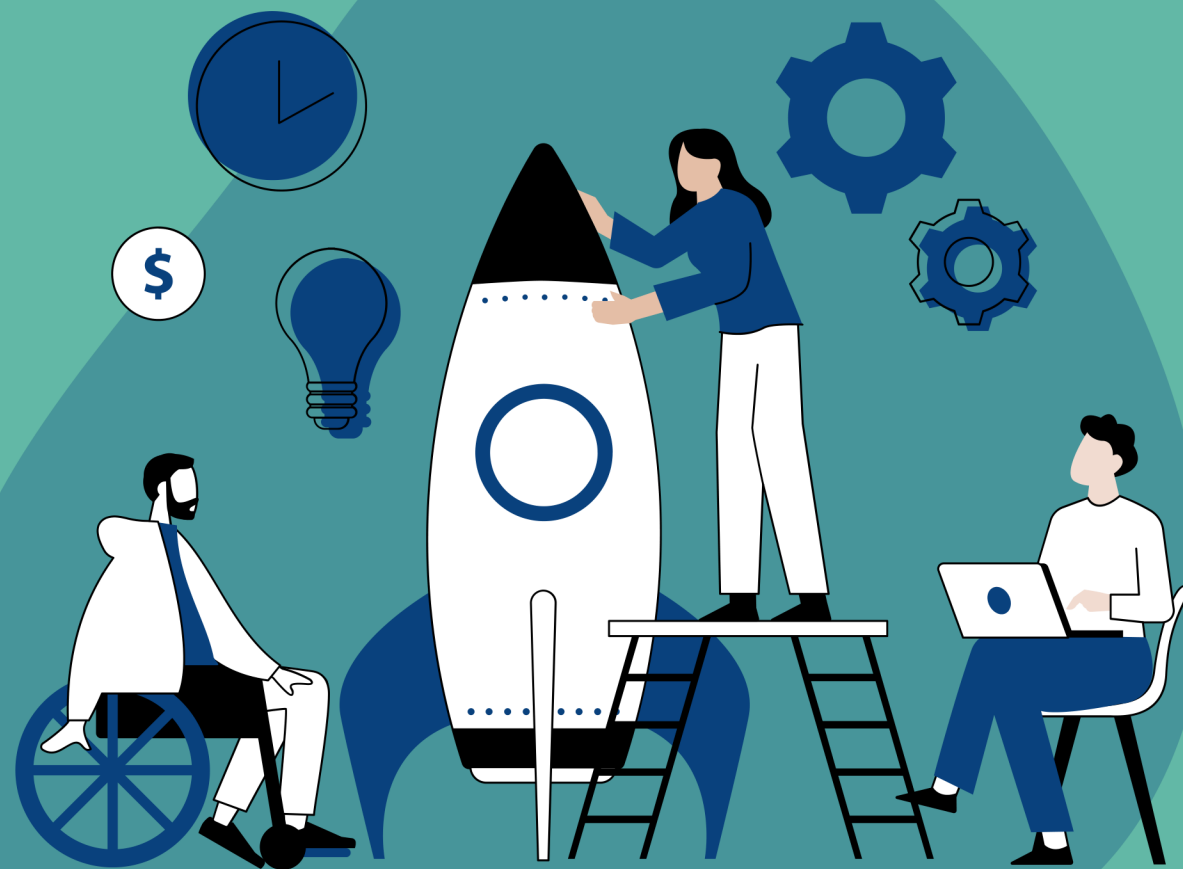
Centralized publishing to Primo was no longer necessary

## **Hello Rapido!**

Opened the door to Rapido

## **Mainly Positive Transition**

The transition was relatively seamless for patrons, which was an important consideration given the fact they were facing a lot of change during the height of Covid





**Questions?**



# Contact Info

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