

# Primo VE & Rapido Migrations, the New Normal: A SWOT Perspective

Molly Gunderson, Interim Assistant Dean, &  
Kimberly Willson-St. Clair, University Studies Librarian

IGeLU Conference 2022  
September 14, 2022



University  
Library

PORTLAND STATE UNIVERSITY

# Land Acknowledgement

We acknowledge the people whose land we are standing on today, the Multnomah and Clackamas. It is important to acknowledge the ancestors of this place and to recognize that we are here because of sacrifices they were forced to make. In remembering the Multnomah and Clackamas communities, we honor their memory, their lives, and their descendants.

[Indian College Fund](#)

[American](#)

# Who Are Our Portland State Undergraduates?

Average Fall Term Enrollment: 19,300 students

## **36% First Generation**

- 9% Asian
- 4% Black
- 16% Hispanic/Latino
- 7% Multiple Race/Ethnicities
- 1% Native American
- 1% Pacific Islander
- 55% White
- 4% International
- 4% Decline to Respond

## **27% identify as BIPOC**

86% Commuter students

*(not living on-campus or taking entirely online courses)*

79% Oregon Residents

79% enrolled Full-Time (12+ credits)

60% were admitted as Transfer students

<https://www.pdx.edu/research-planning/student-profile>

# About the Orbis Cascade Alliance

The Orbis Cascade Alliance is a nonprofit consortia of [38 colleges and universities](#) in Oregon, Washington, and Idaho. The Alliance runs a shared library management system and discovery interface, works on collective purchasing, facilitates access to unique and local collections, and coordinates resource sharing for our members.

ORBIS  
CASCADE  
ALLIANCE



<https://www.orbiscascade.org/>

# Why SWOT?

Strengths & Weaknesses (internal) – Opportunities & Threats (external)

**SWOT Analysis** > Strategic Planning > Future

to

**SWOT Perspective** > Pedagogical Reflection > Past, Present, & Future

# Primo VE Migration 2021–2022



# Library Primo VE Migration Team 2/14-7/14

**Michael Flakus** – Project Manager, Web Programmer (Systems, VE Base Camp)\*

**Kimberly Willson** – Primo VE Lead (DUX, Primo Standing Testing Group)

**Molly Gunderson** – Communication Coordinator, Interim Head of Library Technologies (Rapido Project Group)

**Jian Wang** – Electronic & Continuing Resources Librarian (Analytics Group, Norm Rules Group, Systems Group)

**Karen Bjork** – Head of Digital Initiatives and Cataloging & eAccess

**Suzanne Sager** – Lead Monographic Cataloger (Norm Rules Group)

**Rose Bosely** – Interim Access Services Manager (Rapido Project Group)

\*(Alliance memberships)

## Primo VE – Strengths (Internal)

**Focus on DEI issue** – 374 records changed from subject heading, “Illegal Aliens,” to subject heading, “Undocumented Immigrants,” at the Institution level (IZ)

**Cross-organization exploratory team** – Systems, UX, Cataloging, eResources management, public access membership, and communications

**Only mirror Classic Primo** – Co-leads decided not to add any Primo VE enhancements, avoiding feature creep

# Strength (Internal) – Exploratory Team

In setting out to deploy an exploratory unit within an academic library, administrators should, therefore, be prepared for a top-down restructuring that downplays routinized management in favor of a management style that seeks **to create a forgiving environment where conditions are favorable for creative activity.**

The success of the exploratory academic library unit can only happen if the structure of the **organization permits creative expression, conceptual risk-taking, and repeated failure.**

**Recognition and support of individual creative personalities**, like organizational structure -- critical to the success of exploratory teams and their sustained output.

(Cook & Van der Veer

Martens, 611 & 612)

# PDXScholar Import to Primo VE

**Goal:** Provide integrated discoverability without creating original catalog records.

Before setting up the Discovery import profiles, Karen Bjork identified collections in PDXScholar that would be good candidates for this importation.

**Criteria for selection:**

- Collections that can not be found in another institution; e.g., faculty journal publications
- Collections that do not already have catalog records; e.g., theses and dissertations

[Master of Urban and Regional Planning \(MURP\) Workshop Projects](#)

[Real Estate Development Workshop Projects](#)

August 2022)

(Karen Bjork email,

# PDXScholar Import II

Adding the profiles to the Discovery Import Profiles in the Primo VE configuration was straightforward. The challenges that we encountered included:

- **Knowing that we needed to scope the collections.** After we created the profiles and loaded the data, we expected to see the records in Primo VE. This did not occur until **we included the records in the everything scope search but not in the CDI.** Trial and error led us to discover that we needed to scope both collections.
- **Setting up the normalization rules.** To ensure that descriptive metadata displays correctly in Primo VE, we needed to set up normalization rules to crosswalk the Dublin Core metadata standards to MARC. Mike Flakus, Jian Wang, and Karen Bjork worked on this part of the importation.

(Karen Bjork email, August 2022)

# PDXScholar Import III

A number of times during the Primo VE migration project, we ran into situations where **a change to fix one issue would create a different issue**. It was a little like playing whack-a-mole.

(Michael Flakus email, August 2022)

## Portland State University Library's Primo VE

Mirroring > Deep Copyediting!

### Highlights –

Basic Search - Aligned imperative sentences for Scopes;  
Added description for Special Collections Scope.

Full record example, *Tales from the Crypt* - Alternative title,  
labels, & donor links in Local Notes field

# Basic Search & Scope Descriptions

Search **Books, Articles & More** to find books, articles, journals, and other resources. The articles are from selected PSU Library databases and open access resources. For request options, sign in.

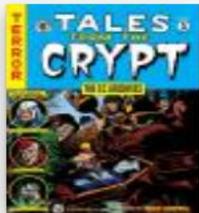
Search **PSU & Summit Libraries** for books, videos, and other physical resources available at PSU Library and Summit Libraries, a partnership of academic libraries in Oregon, Washington, and Idaho. Sign in for request options.

Search the **PSU Library** for books, eBooks, videos, maps, scores, and other resources at the PSU Library. Sign in for request options.

Search **Course Reserves** to find books, articles, and other resources that your professor has on Course Reserves for your class.

Search **PSU Special Collections** for resources, including rare books, manuscripts, and the University Archives. Please contact [specialcollections@pdx.edu](mailto:specialcollections@pdx.edu) to schedule an appointment to view items.

# *Tales of the Crypt*, Dark Horse Comics: The Brief Record



PRINT BOOK

## **Tales from the crypt. Volume 5, issues 41-46**

Gaines, William M., writer, editor.; Feldstein, Albert B., writer.; Campbell, Bruce, 1958-writer.; Geissman, Grant. writer.; Davis, Jack, 1924-2016, writer, cartoonist.; Wessler, Carl, 1913-1989, writer, cartoonist.; Binder, Otto O. (Otto Oscar), 1911-1975, writer, cartoonist.; Oleck, Jack. writer. cartoonist.; Severin, Marie, colorist.; Davis, Jack, 1924-2016, artist.; Kamen, Jack, 1920-2008, artist.; Krigstein, B. (Bernard), 1919-1990, artist.; Ingels, Graham, 1915-1991, artist.; Evans, George, 1920-2001, artist.; Crandall, Reed, 1917-1982, artist.; Orlando, Joe. artist.

2014

Dark Horse Comics Collection at Portland State University.;



University  
Library

Gift of Michael Richardson and Neil Hankerson

# *Tales of the Crypt*, Dark Horse Comics: The Full Record

## Details

---

<b>Title</b>	Tales from the crypt. Volume 5, issues 41-46
<b>Alternative Title</b>	At head of title: EC archives
<b>Author</b>	<a href="#">Gaines, William M., writer, editor.</a> > <a href="#">Feldstein, Albert B., writer.</a> > <a href="#">Campbell, Bruce, 1958- writer.</a> > <a href="#">Geissman, Grant. writer.</a> > <a href="#">Davis, Jack, 1924-2016, writer, cartoonist.</a> > <a href="#">Wessler, Carl, 1913-1989, writer, cartoonist.</a> >

# *Tales of the Crypt*, Dark Horse Comics: The Full Record II

<b>Format</b>	213 pages : illustrations (chiefly color) ; 29 cm.
<b>Local Notes</b>	Dark Horse Comics Collection at Portland State University. <a href="#">Gift of Michael Richardson and Neil Hankerson</a> >
<b>Language</b>	English
<b>Contents</b>	Introduction / Grant Geissman -- Foreword / Bruce Campbell -- Tales from the crypt #41 April-May 1954 / cover artist, Jack Davis ; colorist, Marie Severin -- Operation friendship writer, Otto Binder ; artist Jack Davis --

# Primo VE – Weaknesses (Internal)

**No one was Primo VE certified when we formed the team...**addressed by mid-March

**No usability study** scheduled after June 14th launch

**FRBR** (Functional Requirements for Bibliographic Records) at the institutional level (IZ)

# FRBR?

## Active filters

Print Books X eBooks X

Lock all filters

Reset filters

## Refine My Results

Expand My Results

Sort by Relevance ▾

## External Search ^

Google Scholar

## Availability ^

On Library Shelves 

Open Access 

## Date ^

From To Refine  
 1978 2020

Author ▾

1



EBOOK

### The Venetian Money Market Banks, Panics, and the Public Debt, 1200-1500

Mueller, Reinhold C., author; Lane, Frederic Chapin, 1900-1984. 1997

 OPEN ACCESS

 Online Access >

2



PRINT BOOK

### The Venetian money market : banks, panics, and the public debt, 1200-1500

Mueller, Reinhold C.; Lane, Frederic Chapin, 1900-1997

 Available at PSU Library Shelves - Basement (HG1040 .V46 M84 1997) >

3



PRINT BOOK

### Money and banking in medieval and Renaissance Venice : coins and moneys of account

Lane, Frederic Chapin, 1900-1984.; Mueller, Reinhold C. ©1985

 Available at PSU Library Shelves - Basement (HG1040 .V46 L36 1985) >

4



PRINT BOOK

### The Venetian money market : banks, panics, and the public debt, 1200-1500

Mueller, Reinhold C.; Lane, Frederic Chapin, 1900-1984. 1997

 Find & Request >

FRBR?

**FRBR record - 5 Versions!**

**1**

**2**

**3**

**4**

**5**

**MULTIPLE VERSIONS**  
**Harry Potter and the Half-Blood Prince**  
Warner Bros. Pictures (1969-); Heyday Films, production company; Warner Home Video (Firm), publisher; Heyman, David, 1961- film producer; Barron, David, film producer; Kloves, Steven, screenwriter; Yates, David, 1963- film director; Radcliffe, Daniel, 1989- actor; Grint, Rupert, 1988- actor; Watson, Emma, 1990- actor; Broadbent, Jim, actor; Bonham Carter, Helena, 1966- actor; Coltrane, Robbie, actor; Davis, Warwick, actor; Gambon, Michael, actor; Rickman, Alan, actor; Smith, Maggie, 1934- actor; Spall, Timothy, 1957- actor; Thewlis, David, 1963- actor; Walters, Julie, 1950- actor; Hooper, Nicholas, composer (expression); Rowling, J.K.

5 versions of this record exist. See all versions >

**DVD VIDEO**  
**Harry Potter and the Half-Blood Prince**  
Warner Bros. Pictures (1969-); Heyday Films; Warner Home Video (Firm); Heyman, David, 1961-; Barron, David (Film producer); Kloves, Steven; Yates, David, 1963-; Radcliffe, Daniel, 1989-; Grint, Rupert, 1988-; Watson, Emma, 1990-; Broadbent, Jim; Bonham Carter, Helena, 1966-; Coltrane, Robbie; Davis, Warwick; Gambon, Michael; Rickman, Alan; Smith, Maggie, 1934-; Spall, Timothy, 1957-; Thewlis, David, 1963-; Walters, Julie, 1950-; Bradley, David, 1942-; Felton, Tom, 1987-; Jones, Gemma; Tena, Natalia, 1984-; Williams, Mark, 1959-; Wright, Bonnie, 1991-; Hooper, Nicholas; Rowling, J.K.  
©2009  
Find & Request >

**DVD VIDEO**  
**Harry Potter and the Half-Blood Prince**  
Warner Bros. Pictures (1969-); Heyday Films; Warner Bros. Entertainment; Warner Home Video (Firm); Heyman, David, 1961-; Barron, David; Kloves, Steven; Yates, David, 1963-; Radcliffe, Daniel, 1989-; Grint, Rupert, 1988-; Watson, Emma, 1990-; Broadbent, Jim; Bonham Carter, Helena, 1966-; Coltrane, Robbie; Davis, Warwick; Gambon, Michael; Rickman, Alan; Smith, Maggie, 1934-; Spall, Timothy, 1957-; Thewlis, David, 1963-; Walters, Julie, 1950-; Hooper, Nicholas; Rowling, J.K.  
©2009  
Find & Request >

**DVD VIDEO**  
**Harry Potter and the Half-Blood Prince**  
Warner Bros. Pictures (1969-); production company; Heyday Films, production company; Warner Home Video (Firm), publisher; Yates, David, 1963- film director; Kloves, Steven, screenwriter; Heyman, David, 1961- film producer; Barron, David (Film producer), film producer; Wigram, Lionel, film producer; Radcliffe, Daniel, 1989- actor; Grint, Rupert, 1988- actor; Watson, Emma, 1990- actor; Bonham Carter, Helena, 1966- actor; Broadbent, Jim, actor; Coltrane, Robbie, actor; Gambon, Michael, actor; Rickman, Alan, actor; Smith, Maggie, 1934- actor; Spall, Timothy, 1957- actor; Thewlis, David, 1963- actor; Bradley, David, 1942- actor; Davis, Warwick, actor; Felton, Tom, 1987- actor; Jones, Gemma, actor; McCrory, Helen, actor; Tena, Natalia, 1984- actor; Walters, Julie, 1950- actor; Williams, Mark, 1959- actor; Wright, Bonnie, 1991- actor; Hooper, Nicholas, composer (expression); Terime, Jany, costume designer; Rowling, J.K.  
2014  
Find & Request >

**DVD VIDEO**  
**Harry Potter and the Half-Blood Prince**  
Warner Bros. Pictures (1969-); presenter; Heyday Films, production company; Warner Bros. Entertainment, publisher; Warner Home Video (Firm), distributor; Yates, David, 1963- film director; Heyman, David, 1961- film producer; Barron, David (Film producer), film producer; Wigram, Lionel, film producer; Kloves, Steven, screenwriter; Radcliffe, Daniel, 1989- actor; Grint, Rupert, 1988- actor; Watson, Emma, 1990- actor; Bonham Carter, Helena, 1966- actor; Broadbent, Jim, actor; Coltrane, Robbie, actor; Gambon, Michael, actor; Rickman, Alan, actor; Smith, Maggie, 1934- actor; Spall, Timothy, 1957- actor; Thewlis, David, 1963- actor; Bradley, David, 1942- actor; Davis, Warwick, actor; Felton, Tom, 1987- actor; Jones, Gemma, actor; McCrory, Helen, actor; Tena, Natalia, 1984- actor; Walters, Julie, 1950- actor; Williams, Mark, 1959- actor; Wright, Bonnie, 1991- actor; Delbonnel, Bruno, cinematographer; Craig, Stuart, 1942- production designer; Day, Mark, 1958- editor of moving image work; Hooper, Nicholas, composer (expression); Terime, Jany, costume designer; Rowling, J.K.  
2009  
Find & Request >

**BLU-RAY VIDEO**  
**Harry Potter and the Half-Blood Prince**  
Warner Bros. Pictures (1969-); production company; Heyday Films, production company; Warner Home Video (Firm), publisher; Yates, David, 1963- film director; Kloves, Steven, screenwriter; Heyman, David, 1961- film producer; Barron, David (Film producer), film producer; Wigram, Lionel, film producer; Radcliffe, Daniel, 1989- actor; Grint, Rupert, 1988- actor; Watson, Emma, 1990- actor; Bonham Carter, Helena, 1966- actor; Broadbent, Jim, actor; Coltrane, Robbie, actor; Gambon, Michael, actor; Rickman, Alan, actor; Smith, Maggie, 1934- actor; Spall, Timothy, 1957- actor; Thewlis, David, 1963- actor; Bradley, David, 1942- actor; Davis, Warwick, actor; Felton, Tom, 1987- actor; Jones, Gemma, actor; McCrory, Helen, actor; Tena, Natalia, 1984- actor; Walters, Julie, 1950- actor; Williams, Mark, 1959- actor; Wright, Bonnie, 1991- actor; Hooper, Nicholas, composer (expression); Terime, Jany, costume designer; Rowling, J.K.  
2014  
Find & Request >

# Primo VE – Opportunities (External)

Alliance set up [Asana](#) accounts for consortial members – great tool for project management and team communication

Core Services Librarian Blake Galbreath at Washington State University gave us access to their **premium sandbox for Primo VE viewing and testing**

In March 2022, Alliance Technical Services Program Manager, Leslie Lowery, made **15 Resource Types** for the PSU Library for an Alliance demonstration

Alliance Resource Sharing & Fulfillment and Discovery & User Experience Program Manager Lori Hilterbrand's **Friday email messages and check-ins**

NERS 2022 to August Release 2022 – Ability to assign primary and secondary Resource Types – **access to U.S. Government Information**

# ASANA Actions for the Primo VE Migration

Communications - 8

Enablement - 5

Authentication - 5

**View Configurations - 91**

Search Scopes & Profiles - 9

Display & Local Fields - 11

Local Resource Types - 4

External Data Source Import - 7

**Other Configurations - 24**

Testing (Pre-Live) - 14

Go Live 6/14/22 - 5

Post Go Live - 17

Post-migration cleanup - 11

# Primo VE - Opportunities (External)

Using our knowledge and experience during the migration to address ExLibris about improvements for Primo VE:

**Jian Wang** - 15 ExLibris salesforce cases

**Michael Flakus** - 9 ExLibris salesforce cases

6 Alliance Basecamp cases

# Primo VE – Threats (External)

## **Losing the Library of Congress call number filter / Browse Subject Headings is limited**

– Undocumented immigrants, an example – Lost almost all access to controlled vocabulary except in the full record, the Subjects field.

**Migration of links developed in Classic Primo** redirected to Primo VE. Will they survive another migration? **3303 LibGuide content boxes with one or more links to Primo VE!**

**ExLibris & Basecamp Communication Gap!** Bi-weekly check-ins stopped between Alliance Basecamp and EXLibris one month before launch & did not resume until one month after launch.

# Future Plans for Primo VE at the PSU Library

Library's Primo VE Design Group will review all the **Primo VE enhancements**

**Test view Collection Discovery** with Dark Horse archives in winter term 2023

Look at **FRBR** again in a view winter term 2023

**Usability** testing – TBA

Be on the look out for how **Rapido interplays with Primo VE**

# Rapido Library Resource Sharing – 4/22 -



# Rapido – Strengths (Internal)

Improvement in discovery and delivery – **more streamlined**

**Integrated workflows** between consortial borrowing and lending and Interlibrary loan

**Cross team membership** between Primo VE group and Rapido implementation group – communication is key

# Rapido – Weaknesses (Internal)

**Timing of go live date** and learning new workflows in the middle of fall term 2022

**Unpredictable UX experience** for our users in Primo VE

**Running two systems at the same time** - keeping ILLiad until June 2023

# Opportunities (External)

**Forming the Rapido Project Group** at the consortial level & extended relationships

**Sharing documentation and training**; paving the way for other academic libraries who plan to move to Rapido

Using our knowledge and experience in the migration to **make recommendations to ExLibris to improve Rapido**

# Rapido – Threats (External)

Having to **rethink our loan policies** at the Alliance (short loans vs. long loans)

Left on our own to configure **print slips and book bands**

**No system for testing**; setting up requests in the live system before we “Go Live”

# Final Thoughts....

Primo VE requires constant troubleshooting. Issues occurred with the system when migrating to Primo VE and then after the migration. Problem solving is continuous.

(Jian Wang, email August 2022)

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# Thank you!

## Questions & Sharing



Molly Gunderson  
[mgun2@pdx.edu](mailto:mgun2@pdx.edu)

Kimberly Willson-St. Clair  
[willsons@pdx.edu](mailto:willsons@pdx.edu)



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