Empowering Libraries: Primo VE

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
- Easy configuration and setup
- Monthly releases synced with Alma release cycle
Alma and Primo: From Siloed to Unified Environment

Legacy Environment

- Discovery
- ILS
- Link resolver
- Knowledgebase & Record Services
- ERM
- Local repositories

Now-Gen Environment

- Primo
  Unified Discovery & Delivery
- Alma
  Print, Electronic & Digital Resource Management
Alma and Primo: Moving Even Closer

Legacy Environment

Discovery

ILS

Link resolver

Knowledgebase & Record Services

ERM

Local repositories

Now-Gen Environment

Primo

Unified Discovery & Delivery

Alma

Print, Electronic & Digital Resource Management
Integrated Resource Management & Discovery

Unified discovery and delivery

Search  Explore  Relevance  Locations  Getit  Viewit  ...

Unified & consistent management of all resource types

Patrons  Databases  Books  Journals  Data Sets  Fulfilment  ...

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Our Focus: Workflow Optimization
Primo-Alma Workflow Optimization Initiative

- Simplifying & expediting workflows
- Enable additional unique features
- Enabling faster and more accurate means to manage and discover resources
Simplifying & Expediting Workflows

• Single streamlined admin interface for all library management
• Reduce duplicate setup
  • Utilize configuration already in Alma
  • Configure definitions once i.e. campus, library, IPs, authentication etc.
• Simplify publishing/loading processes
• Simplified ‘task oriented’ configuration and setup
Fast & Accurate Resource Management & Discovery

• Real time data discovery → catalogue and discover
• Real Availability. Always.
• Fully Synced (less moving parts and processes)
• Changes pushed out instantaneously
  • Data elements for search/display
  • Configuration
• Enable additional unique features
Utilize and Deploy New Primo UI

- Primo-Alma Workflow Optimization Initiative utilizes the new Primo UI
- Further enhanced user interface - inherent locations and delivery interfaces

- Fresh, fast and intuitive
- New technologies based on RESTful APIs
- One experience for all devices
- Integrated exploration flow
- Flexible and easy to customize
Primo VE Rollout

Development Partners & Early Adopters

2017

New Alma-Primo customers

New Alma-Primo implementations, including consortia

From 2018

Existing Alma-Primo customers who wish to move

Seamless transition for patrons:
Same new Primo UI | Same Primo Central index

From H2 2018
Rolling Out

- Documentation and training materials (under Primo VE)
- FAQ document published to help clarify questions that are often raised
- New Primo-Alma projects from 2018 will use this deployment model
- Existing customers that may be interested – from mid 2018
### Let’s Take a Peek

#### Alma Configuration

<table>
<thead>
<tr>
<th>Configuring</th>
<th>Filter List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primo on Aim</td>
<td>Look-up or select</td>
</tr>
</tbody>
</table>

#### Discovery

- Search Configuration
  - Search Profiles
  - Restricted Search Groups
- Display Configuration
  - Configure Views
  - Manage Local Fields
  - Local Resource Types
  - Manage Tags
  - Display Items
  - Labels
- Request Configuration
  - Digitization Request
  - Hold and Booking Request
  - Purchase Request
  - Resource Sharing Request
- Authentication
  - User Authentication
  - Restricted User Groups
    - (Central Index / Ebsco)
- Other
  - Central Index and proxy set-up
  - Primo Demo

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**Demo**
THANK YOU
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