Migrating to Primo VE

A long but successful journey for the University of the Sunshine Coast

Meredith Mooi, Systems & Technologies Manager

Rise, and shine.

Outline

- Context and Drivers
- Configuration and Preparation
- Go-Live
- Post go-live

About USC

- Regional university, main campus on the Sunshine Coast, QLD

- Expanding footprint – Brisbane to Hervey Bay (Fraser Coast)

- Rapidly growing – 16,000 students, 5 campuses

- Alma, Primo, Leganto (Esploro coming soon)

- Expansion of Library support and services – archive collections, research support

The Drivers

- Establish digital collections (Alma Digital) and being able to easily create a separate view of Primo

- Easier management of back-end/configurations

- Immediate indexing/availability of local content and electronic activations

The Project

Expressed interest late January 2018, signed on as an early adopter

Kick off 5 February 2018

Target go-live April 2018

Single Ex Libris PM for majority of project (2018)

Weekly project calls

Basecamp discussions

Rise, and shine.

The Approach

EX Libris PM built VE view based on the main view in NUI

Basecamp discussions clarified requirements e.g. EBSCO plug-in, course reserve search and other scopes

DIY Training with guidance – we worked through documentation and established the "Collections" view

Side-by-side comparisons of VE and NUI "Library" view – searches, search results, filtering, exporting, FRBR, patron functions, SSO logins

A Long Journey

- February to December 2018
  - Issues discovered that were gradually fixed in releases
    - Course reserve search not showing the same number of results
    - FRBR issues resolved in October release
    - Virtual browse released in December
  - No pressure from Ex Libris to launch until we were happy

- By December 2018
  - One Show stopper – limitations of NR rules
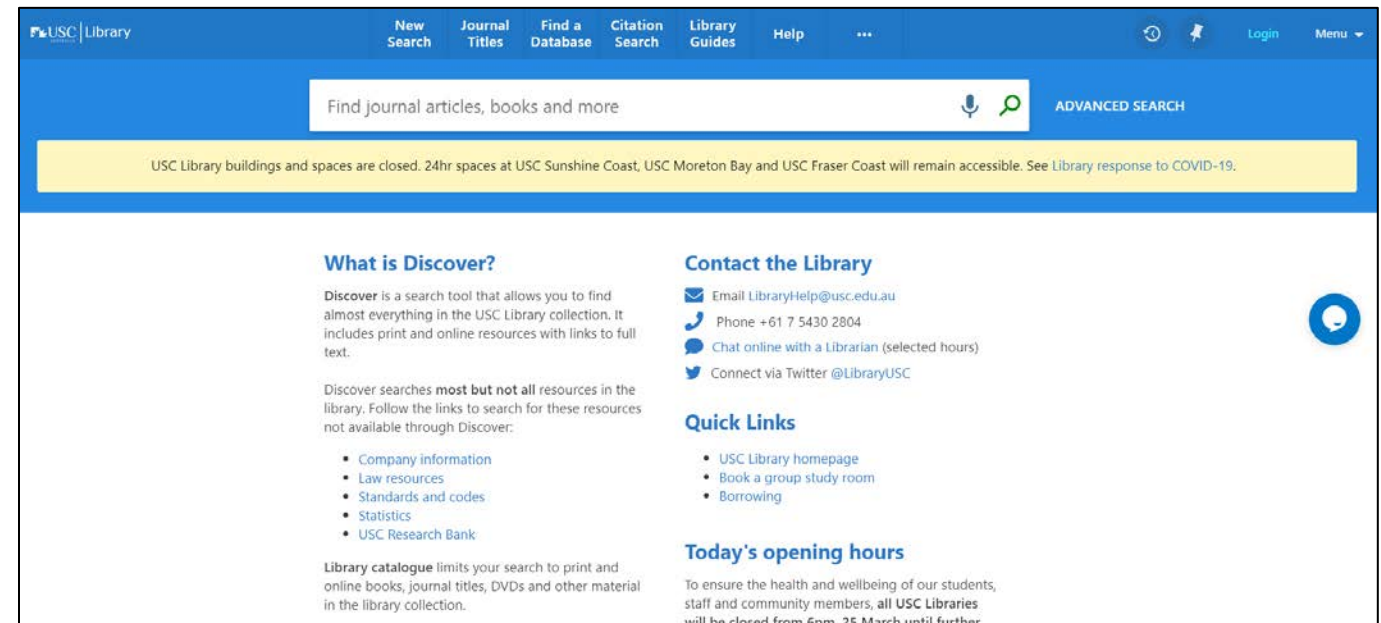 - Reconsidered after 6 months – decided to launch in July 2019

Planning for Go Live

- Target date 18 July 2019
- Final review of configurations completed and tested in 2018
  - Primo VE
  - USC Website – embedded search code on library homepage
  - LibGuides - identified embedded links for bulk update
- Project call with Ex Libris PM to confirm go-live tasks, responsibilities and timing for switch over
- Last-minute panic to update Open URL and republish electronic holdings to Google Scholar

Go Live

- Ex Libris made the switch as agreed
- Library systems staff checked Primo, Leganto all OK
- Switched to the updated library homepage
- Bulk update of embedded links in LibGuides
- Google Scholar updated in record time (just lucky)
- No one really noticed = success!

Post Go Live

- Immediate issues posted to Basecamp and rectified
- Finetuning and tweaking
- More clarification about how VE worked
- Analytics data takes a week or so to update – data for some months was missing

A Successful Project

- Good communication
  - Basecamp discussions
  - Weekly project calls
  - Documenting issues/questions in Word including screenshots
- Logging issues – internal wiki page to track progress of Basecamp questions and SF cases
- Testing, testing, testing

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Recommended Checklist

- Contact Ex Libris early and begin planning
- Determine and confirm timing and process for go-live
  - Coordinate internally and externally
  - Embedded search code, links; SSO and redirects
- Primo Classic links will not redirect
- NUI Permalinks will not redirect
- Saved searches can't be copied

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In Summary

- End-users are happy with it
- We love our digital collections view
- We've been able to easily implement new functionality e.g. newspaper search and integrations e.g. Browzine, chat
- Have quickly responded to and easily made COVID-19 related changes
- We'd still like to see further development and full flexibility i.e. NRs etc.   Parity with Primo BO is a must

Thank you

Meredith Mooi

MMooi@usc.edu.au