Frequently Asked Questions for Primo VE

1. **What is Primo VE?**

   Primo VE is a new deployment model of Primo that simplifies the Primo back-end processes and further optimizes the management of Primo with Alma by utilizing the Alma platform.

   Primo VE, coupled with the new Primo UI, enables libraries to benefit from the following:
   - Unified back-end management of Primo and Alma
   - Reduction of duplicated administration processes
   - Seamless publishing processes
   - Real-time discovery of records created in Alma
   - Task-oriented configuration and setup
   - Enhanced user experience

2. **What does "VE" stand for?**

   The VE suffix has no meaning. It is used only to differentiate it from the new and classic Primo UIs, which are not configured on Alma's platform.

3. **As an existing Alma-Primo customer, can I choose to move to Primo VE? Can I choose to stay with my existing Primo deployment?**

   Existing Alma-Primo customers can choose to move to the Primo VE deployment, if they want, as of mid-2018. Customers are not required to move from existing Primo deployments to Primo VE, and all current Primo deployment models continue to be supported.

4. **Who is Primo VE suitable for?**

   Primo VE is suitable for customers with both Primo and Alma who wish to gain the full benefits of the Alma platform, and from having the two products in the Ex Libris cloud.

5. **If I am not an Alma customer, is Primo VE relevant to me?**

   Primo VE deployment is designed at this stage for optimization of Primo with Alma. Primo for non-Alma ILS will be implemented in the existing Primo deployment models. We will be looking at utilizing Primo VE for other ILSs in the future.

6. **Can I use Primo VE and still access the classic Primo Back Office when needed?**

   In Primo VE all configuration and management processes are done from within the Discovery configuration menus in Alma to simplify its back-end management processes. Customers implementing Primo VE will not have access to the classic Primo Back Office.

7. **Can I load external data sources into Primo VE?**

   Yes. Primo allows users to discover all relevant library materials. External data sources such as digital repositories,
libguides, and others will be loaded into Primo VE, similarly to how it was done in other Primo models, and will be fully discoverable.

8. **Can I customize the Primo UI?**

The Primo VE deployment model uses the same technology as the new Primo UI, which can be customized and extended using the Primo Open Discovery Framework. The framework allows customers with Angular and CSS knowledge to extend the Primo UI with new capabilities, develop additional functionality, and connect Primo with external services. Customizations and extensions can also be shared with the Primo community, so other Primo users can leverage the power of the community to enhance their own systems with no extra work.

9. **Does Primo Analytics work with Primo VE?**

In Primo VE the Primo Analytics is accessed from within the Alma menu, which is similar to the way it is accessed from the Primo Back Office menu.

10. **Does Primo VE support consortia?**

Primo VE deployment supports the existing Alma consortia and collaboration models, which may or may not include an Alma Network Zone.

11. **Which authentication methods are supported with Primo VE?**

Primo VE supports a number of authentication schemes, which are defined using Alma’s integration profiles and can be selected for the use of patrons in Primo. An institution may choose to use more than one authentication scheme. Primo VE supports the following authentication schemes:

- LDAP
- SAML2 based authentication such as Shibboleth
- OAuth based authentication with Facebook, Google, or Twitter
- CAS

Additional means for authentication are being discussed as part of the community Authentication Focus Group.

12. **When will Primo VE be ready for implementation?**

Currently, Primo VE has been implemented for a number of development partners and early adopters. As of 2018, all new Alma-Primo implementations use the Primo VE deployment model.

13. **Does Primo VE work with Primo Central Index?**

Primo VE integrates with Primo Central Index in the same way as other Primo deployment models. The library can activate the collections they wish to expose for searching, and the results can be displayed as blended or separate from the locally managed records. The library manages their electronic resources in Alma, which publishes the holdings information to Primo Central Index, indicating which resources should be displayed as full text available.

One of the unique features of Primo VE enables libraries to match physical and electronic holdings. Once a user clicks on a record from Primo Central Index – in addition to showing the electronic services available (as any link resolver does), Primo VE will also check if there are any relevant physical holdings and show the user that the library also holds a physical copy for this journal/book.

14. **How does the Primo roadmap affect Primo VE?**

The Primo roadmap, which is published to our customers every year, describes the areas in which we plan to
enhance Primo in the coming year. This roadmap is relevant for all Primo deployment models, including Primo VE.

15. **What is the Primo VE release cycle?**

   Primo VE is released on a monthly cycle, aligned with the Alma release cycle. As done for Alma releases, Primo VE releases are made available on the sandbox two weeks prior to production to allow customers to test it ahead of the release.

16. **Can I control the metadata used in Primo VE?**

   Yes. Libraries can expose their records and data to end users like they do today, while enjoying shorter and more seamless workflows. In Primo VE an emphasis has been put on streamlining publishing processes, optimizing it for SaaS, and enabling real-time discovery of records.

   Primo VE offers a vast (and growing) set of out-of-the-box presets for standard metadata fields from which the library can choose to use for discovery, facets, and search. In addition, Local fields can be configured easily for display and indexing.

   As part of our future plans, we will further enhance the normalization capabilities to allow more granular normalization beyond its pre-set capabilities.

17. **How does Primo VE affect Summon and Summon over Alma?**

   Summon has hundreds of satisfied customers and will continue to be one of Ex Libris' flagship discovery products. In early 2016 we announced the development of Summon over Alma, which was rolled out in 2017. Our key focus has been on the integration of Summon with Alma, to allow Summon customers to benefit from a unified management and discovery of resources, and integrated patron services. We are continuing to enrich the Summon over Alma solution, and as part of its future enhancements, we will examine deployment models that are similar to Primo VE.

18. **How does Primo VE affect Primo Total Care customers? Will Total Care customers get access to the Primo configuration menus?**

   Primo VE is designed to simplify the Primo back-end configuration and processes and is suitable for all customer types and deployments. Primo Total Care customers who move to the Primo VE deployment will get full access to the Primo configuration menus through Alma, which are task-oriented and very easy to use.

   Total Care customers who would rather not configure Primo themselves may request Ex Libris to perform periodic changes for them. Although, the feedback received from Total Care customers who have already moved to Primo VE are clearly in favor of handling the configuration and periodic changes themselves.