Frequently Asked Questions from Existing Primo Customers

What is Primo VE?
Primo VE is a new deployment model of Primo, which simplifies Primo backend processes and further optimizes the management of Primo using 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

General

1. Who can take advantage of Primo VE?
   Any existing Alma-Primo customer can choose to move to Primo VE, regardless of their current Primo deployment today.

2. Will we have SSH/Shell access to Primo VE?
   No. Similarly to Alma, Primo VE presents functionality and tools in a manner that suits SaaS solutions.

3. Are there additional costs with moving to Primo VE?
   No. There are no additional costs to move to Primo VE.

4. When can customers move to Primo VE?
   Customers who are interested in switching to Primo VE should contact the URD Delivery team at URD_Delivery@exlibrisgroup.com

5. Does Primo VE integrate into our current Alma environment, or would we have to migrate to a new Alma-Primo VE environment?
   Because Primo VE is part of your current Alma environment, there is no need to migrate to a new Alma-Primo VE environment.
Activation

1. Are there any requirements to move to Primo VE from an existing Primo instance?

   Besides being an Alma customer, you need to notify Ex Libris of your interest.

   You also will need to use the new Primo UI. Ex Libris tools will migrate the setup and UI customization from your existing Primo instance for you to test. The customer’s assistance will be required to help Ex Libris to define the authentication policy for Primo VE.

2. Does setting up Primo VE affect my existing Primo instance?

   Primo VE is set up in parallel to your existing Primo and does not affect the production behavior. Until it is ready, it will be visible only to staff for testing in parallel with the existing Primo. When the migration is complete and fully tested, traffic will be directed to the new Primo VE.

3. What customization options are available for the Primo VE user interface?

   Primo VE uses the same customizations as the new Primo UI. The customization package can be uploaded to Primo VE.

4. Does Primo VE work with the classic Primo UI?

   No. Primo VE supports the new Primo UI only. Customers will need to move to the new UI before or as part of the move to Primo VE.

5. Can Primo VE be tested separately from our existing Primo instance?

   Specified staff can test Primo VE outside of your current Primo instance.

6. How do we go live with Primo VE?

   When you are ready, we will direct traffic from your existing Primo instance to Primo VE.

7. Is there system downtime or impacts on the end users when going live with Primo VE?

   There is no system downtime or impacts on the end user.

8. Does the previous version of Primo remain active after going live with Primo VE?

   Yes. The previous version of Primo will remain active for a period of time and its decommission will be initiated following a communication with the customer.

Technical

1. Are Primo VE and Alma on the same server?

   Primo VE is deployed on dedicated servers within the Alma platform.

2. Will Alma and Primo VE experience concurrent or separate downtimes?

   In cases of general maintenance, both may experience downtime. In cases based on specific components, either Alma or Primo may experience downtime.

3. How do we monitor system status for Primo VE?
Status can be monitored on the Ex Libris Status Page.

4. With Primo VE, will our URLs change? Will we need to revise our existing search boxes that are deployed for our Primo instance on our various search pages?

As long as you have a dedicated URL today, you will be able to keep it. If you decide to switch to a new Primo base URL for your institution (such as abc.primo.exlibrisgroup.com), it will provide backwards compatibility for users who continue to use the old base URL.

5. Does the new Alma Certification training include Primo VE certification training? If not, what is the recommended course for Primo VE training?

Primo VE training materials are available online in the Customer Knowledge Center (Primo VE Training). At a later stage, they will also be included in the certification training.

6. What actions are needed in Primo VE to update new/updated bib records in Alma?

None. The Primo Index will update in real time.

7. We currently have pipes to harvest digital (OAI) content into Primo. Will the pipe process in Primo VE similar to that in the traditional Primo Back Office?

Loading external data is done in a similar manner to the way it is done in Primo. The data is periodically loaded from the external source via OAI/SFTP, normalized, and exposed in Primo. Please see the following document for more information: Configuring Import Profiles for Primo VE

8. Are resources managed by Rosetta considered to be external and harvested via pipes as we do for CONTENTdm, bepress, and other non-Ex Libris repositories?

Rosetta can be integrated with Alma-D allowing metadata management in Alma, which seamlessly feeds into Primo VE without any setup or data loading. Alternatively, you can treat Rosetta like other external repositories and import it into Primo as an external data load.

9. Will our e-shelf records be moved from Primo to Primo VE?

Yes (if moving from an Alma-Primo environment).

10. Does move to Primo VE have any implications in relation to Leganto/Primo interactions?

Because Leganto works with either deployment of Primo, there are no implications to moving to Primo VE.

11. Will permalinks from our current Primo redirect to the new URL in Primo VE?

Yes. For more details, see Configuring Redirection for Primo VE Deep Links.

12. Do we need to have new PCI / bX registrations for Primo VE, and would we need to reactivate our PCI collections?

No. We will update Primo VE with your current PCI / bX keys so that the configuration will remain the same as the one in your current Primo.

13. Will our Primo Analytics data and reports be retained and visible after we move to Primo VE?

Primo Analytics is accessible from within the Alma menus, including all of the existing folders: reports and data.

14. If we are a Primo Total Care customer, will total care continue with Primo VE?
Primo VE is designed to simplify the Primo back-end configuration and processes and is suitable to 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 switched to Primo VE are clearly in favor of handling the configuration and periodic changes themselves.

15. If we move to Primo VE, do the x-services APIs still function as they do today, or would we need to migrate to other APIs?

   Primo VE supports the new Primo REST API Suite, which provides access to Primo search capabilities and results as used by the new Primo interface.

16. Will existing normalization rules and PNX changes be retained if we move to Primo VE?

   In Primo VE an emphasis has been put on streamlining publishing processes, optimizing it for SaaS, and enabling real time discovery of records. As such, a lot of functionality that was achieved by data normalization and data reloads in the past is now done by more streamlined and simpler configuration options. As part of the migration, some of the configuration will be set up for you, but some configuration may still be needed in Primo VE.