Primo vs PrimoVE @Expania

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Primo

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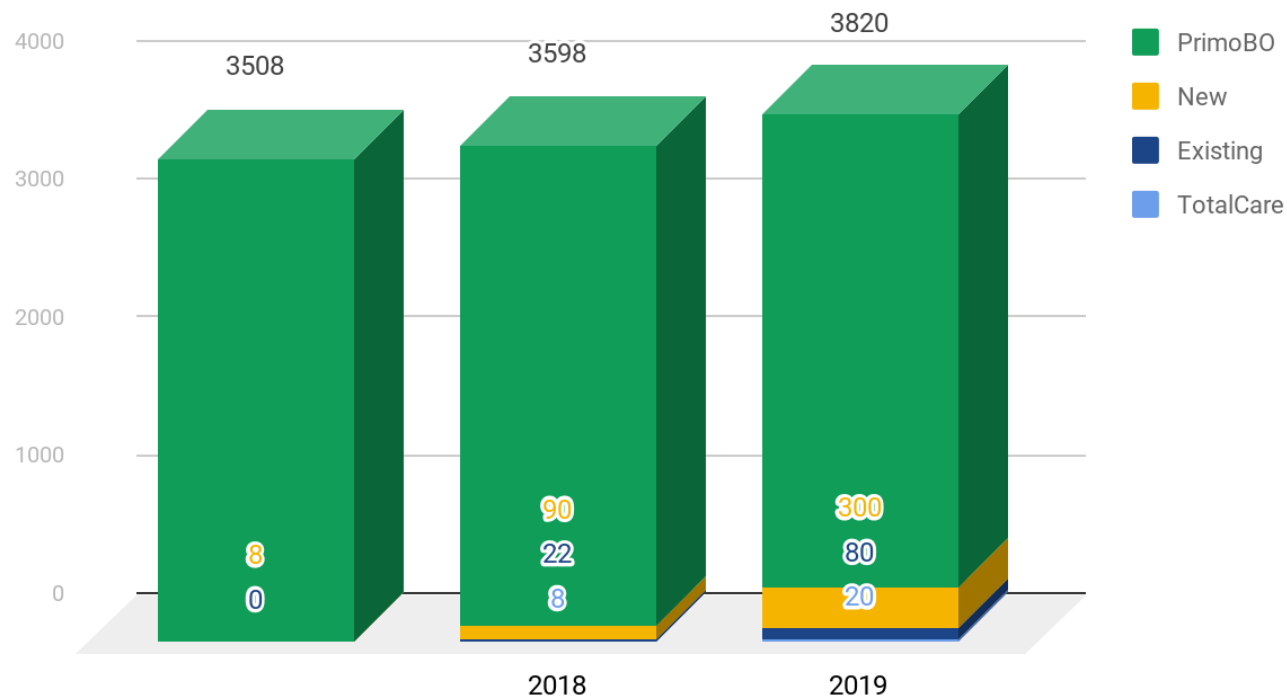en España

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Introduction about the differences between Primo and PrimoVE

- Primo and PrimoVE are separate deployment models of Primo, and are not considered by Ex Libris to be separate products. Primo customers using Alma can benefit from a tighter integration of the two services (Primo, Alma) through PrimoVE, for which management functionality is handled through Alma, instead of through the Primo Back Office interface.

- PrimoVE was designed to allow for real-time updates between Alma and PrimoVE and to offer Primo customers as many configuration options out of the box to minimize the need for customization and high learning curve required for Primo's Back Office.

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Primo versus PrimoVE installations status today

Primo VE Installations

	Primo	PrimoVE
2017	3500	8
2018	3478	120
2019	3420	400

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What about the future of the standalone Primo application?

- Ex Libris has ongoing commitment to developing the standalone Primo application in tandem with PrimoVE.

- New customers would be offered the PrimoVE model as part of new Alma implementations.

- Ex Libris continues to offer Primo to non-Alma customers and will continue to develop it.

- As much as possible, functional parity will exist between PrimoVE and Primo, but there may be some functionality only available within VE (uniquely possible due to its shared architecture with Alma).

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Different release schedule

- As PrimoVE is aligned with the Alma monthly release cycle and Primo is on a quarterly release schedule, features may be introduced within the PrimoVE environment earlier in the development cycle than the Primo environments.

- This would mean that VE customers might see certain features sooner than installations of Primo still tied to the quarterly release schedule.

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What doesn't change between the models

- Primo Central Index (PCI) or PCI Administration

- The New UI customization package

- Existing Alma-based functionality

- SaaS related functionnalities

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Browse functionnality

Like Primo, the VE Browse Search does not include Primo Central Index records.

In PrimoVE, Browse is generated dynamically from Alma headings.

Primo	Feature	Primo VE
	Browse	
Y, browse index from Primo	Browse by Title, Subject,Author, Call Number	Y*, browse index from Alma
Y	Database Browse	Y
Y	Journal Title Browse	N

Feature alignment schedule for PrimoVE			
Categories	Area	Title	Projected Quarter
Browse	Browse Search	Browse by Series Option	Q1 - completed
		Browse by UDC and NLM Call Numbers	Q3
	Virtual Browse	Include Electronic Materials in Virtual Browse	Q4

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Content (external sources)

PrimoVE provides the ability to ingest records from external data sources, manually and on a configurable schedule, utilizing the methods utilized by Primo (OAI-PMH, FTP, SFTP, and file upload). Changes from Primo to PrimoVE:

- Indexing occurs instantly (within 15 minutes)

- Alma Import Profiles are used instead of pipes. PrimoVE advantage over Primo: Alma can send success/failure notifications.

- Primo normalization rules are replaced by Alma drools normalization

Primo	Feature	Primo VE
	Content	
Dublin Core, MARC 21, XML	External Data Source Formats	Dublin Core, MARC 21, XML
Many	ILS Content	Alma
Y	Primo Central	Y
Y	MetaLib	N
Y	Digital Collections	Y
Y	Featured Results	Y
Y	Resource Recommender	Y
Y	Newspaper Search	Y

Feature alignment schedule for PrimoVE			
Categories	Area	Title	Projected Quarter
External Data Source	Import Process Improvements	Display Execution Logs for the Import Process	Q1 - completed
	User Experience	Add External Data Source Facet	Q1 - completed

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Integrations

Primo	Feature	Primo VE
	Integrations	
Y	RESTful APIs	Y
Y	X Services	N
Y	SOAP	N

X-Services and SOAP web services are deprecated and not supported by PrimoVE.

- PrimoVE supports the REST API Suite, which provides access to search capabilities and results

- MetaLib search integration is not supported.

- Deep-Link syntax is different but Primo Deep-Link redirect Configuration provides backward compatibility.

- External applications making currently use of the PNX record will have to be checked and adjusted

- Zotero is supported

- Planned: sitemaps for search engine harvesting (Google)

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Publishing

Primo	Feature	Primo VE
	Publishing	
Batch index / hotswap	Indexing	Real-Time Publishing

The toolkits that connect Primo and PrimoVE to their search indexes are significantly different.

- In the Primo model, both Alma data and external source data are imported, converted into the common PNX record format, and then periodically indexed for searching by the user. Changes appear to users when a hotswap of newly rendered index files is completed.

- Within PrimoVE, users search the PrimoVE index (which includes Alma records and external data source records) and results are "rendered" through normalization rules optimized for display. Thus, the SOLR interface used in PrimoVE enables more query-time transformation, whereas Primo relies on episodic jobs of normalization, FRBR, Dedup, indexing and hotswap to display changes. Relying on query-time display as PrimoVE makes real-time publishing possible.

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Authority

Authority enrichment for non-preferred terms:

- Non-preferred terms are indexed, but cross-references are not included in PrimoVE browse, which is based on Alma browse.

- Authorities will only be created for Alma records and will not be created for external data sources.

Primo	Feature	Primo VE
	Authority Control	
ILS Authority Expand	Source	Alma
Y	See	N
Y	See Also	N

Feature alignment schedule for PrimoVE			
Categories	Area	Title	Projected Quarter
Others	Expose to Web Engines	Google Sitemap and Schema.org	Q4
	Multi-Lingual Support	Support Display and Facet for Multilingual Authority and Metadata	Q4

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Search engine configuration

Primo	Feature	Primo VE
	Search Engine Configuration	
Y	Blending by Data Source (Local, External, PCI)	Y
Y	Boosting Institution Holdings	N
Y	Boosting by Resource Type	N
Y	Rank weights for specific search fields, year	N
Y, if institutions have installation-level access	Can Set Results Threshold (number of results for active search fields)	N
Enable/disable for system, local file for customers with server access	Synonymns	enable/disable

Feature alignment schedule for PrimoVE			
Categories	Area	Title	Projected Quarter
Search and Facet	Search	Adding Pre-Filters in Basic Search	Q1 - completed
		Results Boosting Configuration	Q3
		Ability to Search by Holding Records Information	Q3
		Ability to Apply Search with Pre-Filters on Entire Alma Data or Entire External Data Source	Q4
		Full Text Indexing for Alma-D Items	Q4
	Facets	Merging Locations within a Single Library That Have the Same External Name	Q1 - completed
	Support Library Classifications	Nippon Decimal Classification (NDC) – Support for Display, Search, and Facet	Q1 - completed
		Library of Congress Classification (LCC) – Support for Facet	Q4

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Administration

- Within PrimoVE, several of these administrative functions have been consolidated under the Discovery Administrator role within Alma.

- Notable exceptions are drool normalization rules, Alma OpenURL resolver, and display logic for the GET IT services.

- One of the core opportunities offered by PrimoVE is the simplified administration of the public interface through shared configurations with Alma. The view wizard is more streamlined than in Primo, highlighting a number of options that used to reside in code tables or normalization rules.

Primo	Feature	Primo VE
	Administration	
Separate Back Office Application	administration application	Integrated within Alma and Alma Roles
Y	Code and Mapping Tables	Y
Y	FRBR and Dedup Testing Tools	Y
Back-Office	Authentication	Integrated with Alma Institution

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FRBR / Dedup

Dedup has a different method of calculation in PrimoVE. It relies on **key field matching** rather than a **weighted scoring algorithm**.

Primo	Feature	Primo VE
	FRBR / Dedup	
Normalization rules, during re-index	When	real-time
data source and local repository	Level	view level (currently)
across data sources, local and external	How	across data sources, local, external. VE will also match physical holdings against PCI records.
Y	Single DeDup match point (f20)	N
Y	By Resource Type	N

Feature alignment schedule for PrimoVE			
Categories	Area	Title	Projected Quarter
Dedup and FRBR	Dedup and FRBR Improvements	Matching Points Improvements	Q1 - completed
		Merge Metadata from all Records in the Dedup Group	Q2 - completed
	DC Records	Support Dedup and FRBR for DC Records	Q1 - completed
	Configuration Options	Ability to Configure the Dedup and FRBR Keys	Q4

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OPAC via Primo (OvP)

OvP functionality has been distributed to other functional areas within Alma, including delivery, resource-sharing, requesting, course reserves, acquisition and digitization services.

Primo	Feature	Primo VE
	OPAC via Primo	
	integrated requesting	
Alma = Iframe, Aleph/Voyager = API	in UI	API (integrated/native) no iframes

Feature alignment schedule for PrimoVE			
Categories	Area	Title	Projected Quarter
Library Services	Get It Service	Support Item Level Requesting	Q2 - completed
		Support the Ordering of Locations in Get It	Q2 - completed
		Real-Time Availability Status on Resource Sharing Request Form	Q2 - completed
	View It Service	Additional Services for Digital Items in View It	Q2 - completed
	Generic Services	Blank Patron Purchase Request Form	Q3
My Library Card	Exposing Configuration and Information	Display a User Blocks' Expiry Date in My Library Card	Q1 - completed
		Configuration for Display Fields of the Loan Items	Q3
		Ability to Opt In/Out of Notices in Personal Details	Q4

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Normalization

Normalization of Alma data is available in PrimoVE via dedicated Alma pages and menus.

Primo	Feature	Primo VE
	Normalization	
based on XSLT and custom Primo functions		based on Alma Drools
Y	Create local display fields	Y
Y	Edit OTB display field sources	Y
Y	Create local facets	N
Y	Add values to OTB static facets	N
normalization rules, indexing required	Create custom search scopes	select metadata elements, instant effect
back office	modifications	via MD editor

Feature alignment schedule for PrimoVE			
Categories	Area	Title	Projected Quarter
Normalization Capabilities	Search and Facet Normalization	Metadata Normalization for Search and Facets in Local Fields	Q2 - completed
	Display Normalization	Extend Normalization for Display to Support UNIMARC	Q1 - completed
		Local Resource Type Normalization for MARC Leader and Fixed Fields	Q2 - completed

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Consortium

Consortia functionality for PrimoVE focuses on three general areas:

- Metadata management per Alma setup (linked/local records)

- Each institution may configure search scopes to search its local holdings or itself and/or other network members

- A simple, seamless publishing process for institutional and consortial holdings. In this publishing process, institutions may configure their own display normalization.

Creating multiple Primo institutions per Alma institution is not an option in PrimoVE, rather Alma's institution configurations must be used. Instead, an institution can have multiple campuses, and affiliate these with "Electronic Group Setting" for groups of libraries that have access to particular electronic portfolios, that are not available to the full institution.

Feature alignment schedule for PrimoVE			
Categories	Area	Title	Projected Quarter
Consortium	Union Catalog	Union Catalog View	Q3
	Search Options	Ability to Exclude External Data Source from Entire Network Search	Q3
		Create Custom Search Scopes for Other Institutions – Based on Availability	Q2 - completed

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AtoZ list (Primo) vs e-Journal Search (PrimoVE)

- The e-Journal A-Z list does not exist in PrimoVE. Instead, PrimoVE has a (print and electronic) journal search with autocomplete, with the additional feature of searching for articles within a journal.

- PrimoVE offers an accurate auto-complete based on the journal titles held or subscribed by the university. A user can start typing rather than choosing a letter of the alphabet and seeing a long list. The PrimoVE Journal Search goes beyond the traditional link resolver journal search interfaces, by offering both electronic and print journals. PrimoVE also offers a 'search within' feature that allows the user to search for articles in that are part of the journal they are interested in.

Ex Libris documentation links on PrimoVE

- Alma and Primo VE

https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/Alma_and_Primo_VE

- Primo VE Overview

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/004Getting_Started_with_Primo_VE/Primo_VE_Overview

- Frequently Asked Questions for Primo VE

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/005Frequently_Asked_Questions

- Primo VE Training

https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training

- Feature alignment schedule for PrimoVE

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/005FAQs/Feature_Alignment_Schedule_for_Primo_VE

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