

Moving to PRIMO VE

Prepared by the CSU ULMS Discovery Functional Committee - May 21st, 2021

Recommendation

Based on survey and straw poll results, detailed below, campuses indicated significant support for moving to Primo VE. Congruent with those results, the DFC recommends to the ULMS Steering Committee that:

All campuses move to VE together this summer. Campuses may switch any date between July 5th and August 5th, 2021.

Background

For 2020-2021, the ULMS Discovery Functional Committee was tasked with undertaking an evaluation of Primo VE at the request of the ULMS Steering Committee. Primo VE is now the default discovery tool used in new Alma implementations, and likely will be the development direction for future Alma discovery enhancements. The Discovery Functional Committee shared its Primo VE evaluation plan during the October 2020 Discovery Open Forum. Since January 2021, all CSU campuses have been testing the consortial Go VE process, providing Ex Libris feedback on the Go VE workflow, and evaluating the functionality and management capabilities of Primo VE.

Evaluation Process

The ULMS Discovery committee devised four areas of testing and accepted feedback from the CSU Libraries including:

- **Back End Usability**, i.e. how easy to use and manage was Primo VE relative to classic Primo Back Office?
- **Front End Usability**, i.e. how similar was the patron's experience performing routine tasks in Primo VE relative to classic Primo?
- **Relevance Ranking**, i.e. how relevant were results for the exact same queries (or as close as could be achieved) in both Primo VE and classic Primo?
- **Load Speed**, i.e. how quickly did Primo VE load pages analogous to classic Primo?

Throughout the evaluation, [Go VE Forums](#) via Zoom, were used to guide campuses through the Self-Switch process and solicit feedback for Ex Libris to improve the process. The forums were well attended and well received by campuses.

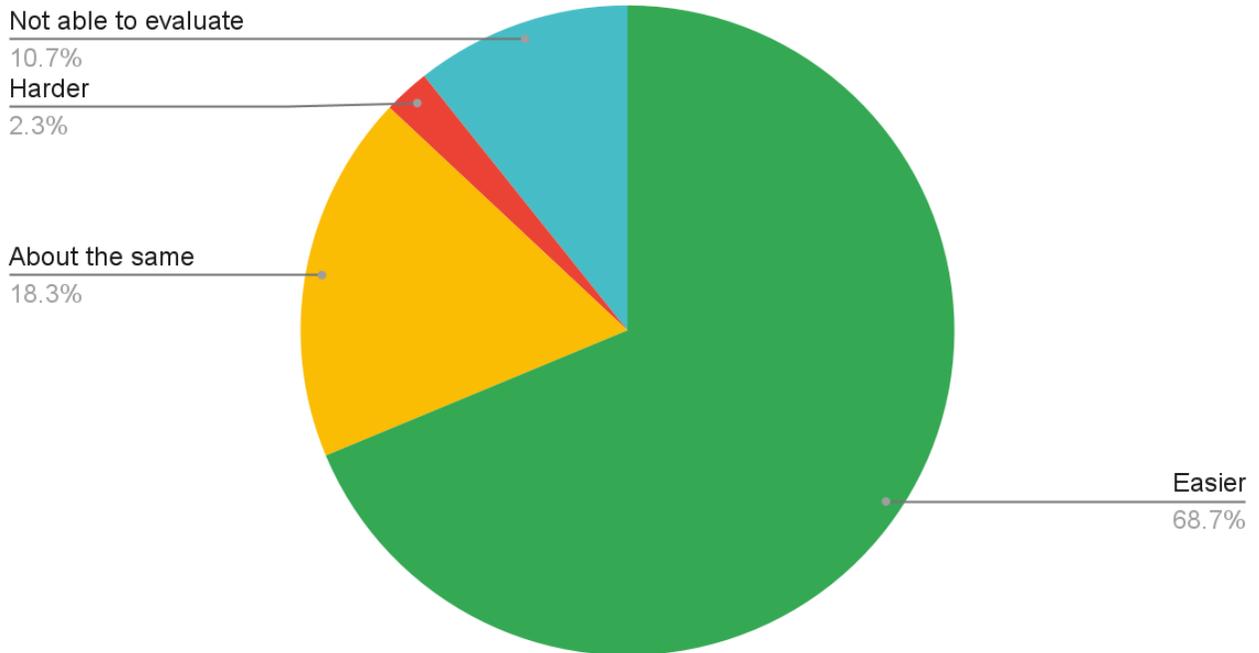
April was designated as the testing month by design so that campuses would have January, February, and March to go through as much of the Self-Switch process as possible prior to formal evaluation of the product, and prior to allowing additional users to view the Primo VE instance for their campus. During the last week of the evaluation, a straw poll of library Primo admins was run with the question "Which version do you think CSU Libraries should use?" Summary results for each area of the evaluation and the straw poll are below.

Results of Evaluation & Testing

- **Back End Usability**

Each respondent was asked to review seven common tasks and compare whether easier, about the same difficulty, or harder to perform in Primo VE than in classic Primo. Overwhelming majorities found six of the seven tasks to be easier in Primo VE.

Back End Usability Tasks

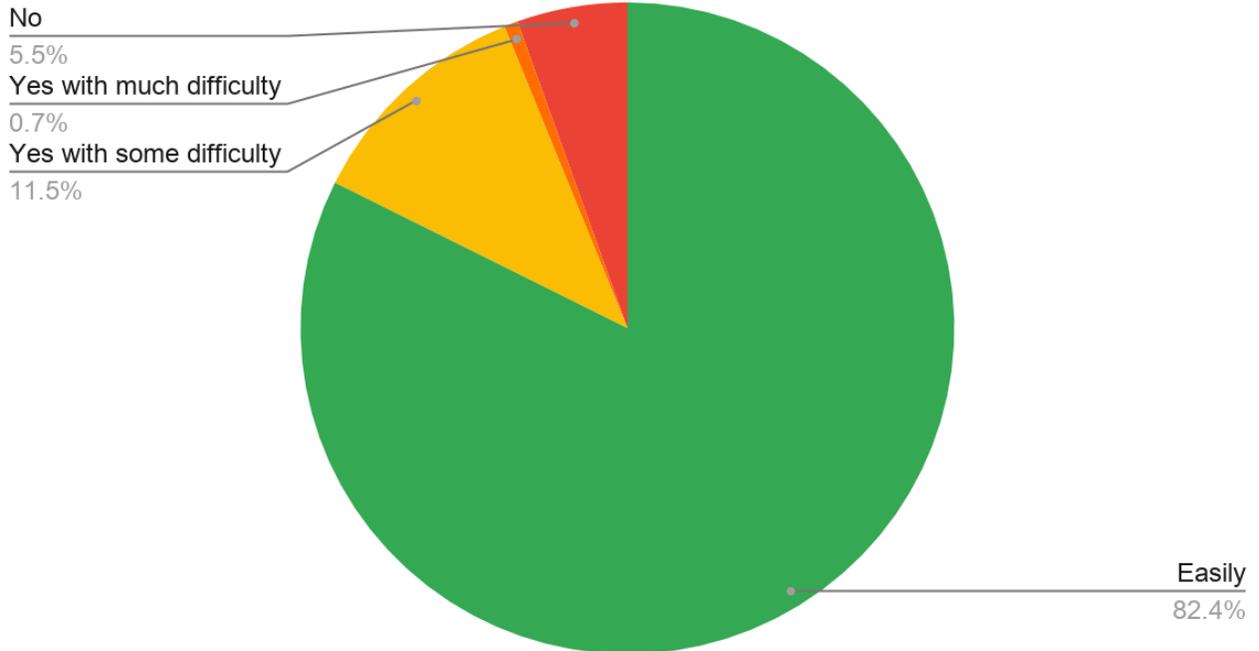


Note: Response rate of 71%

- **Front End Usability**

Respondents were asked to perform three tasks and note whether highly used features of classic Primo were visible and functioning appropriately in Primo VE. This portion of the evaluation was open to multiple responses per campus.

Front End Usability Tasks

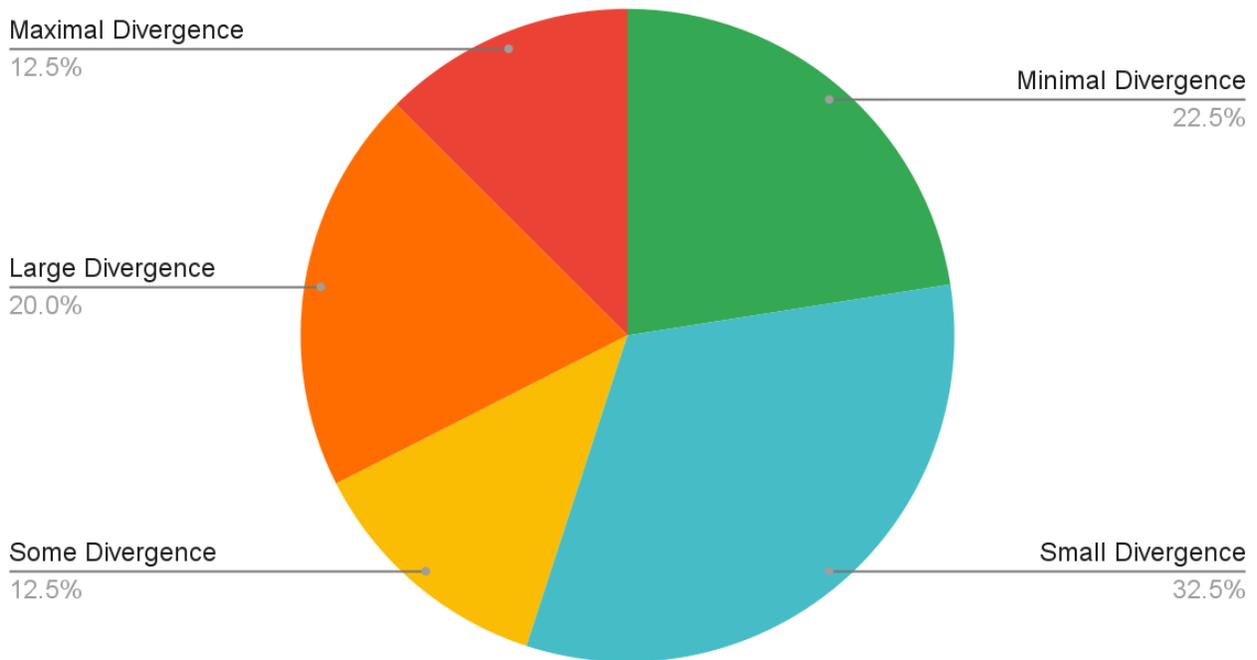


Note: Response rate of 63%.

- **Relevance Ranking**

Respondents were asked to perform the same query in both classic Primo and Primo VE then compare the sets of results by assigning a divergence score and offering comments. Free-text comments were analyzed as to whether they expressed positive, negative, or neutral responses regarding VE. Most (76%) comments were neutral; seven (17%) were positive and three (7%) were negative. This portion of the evaluation was open to multiple responses per campus.

Results Comparisons

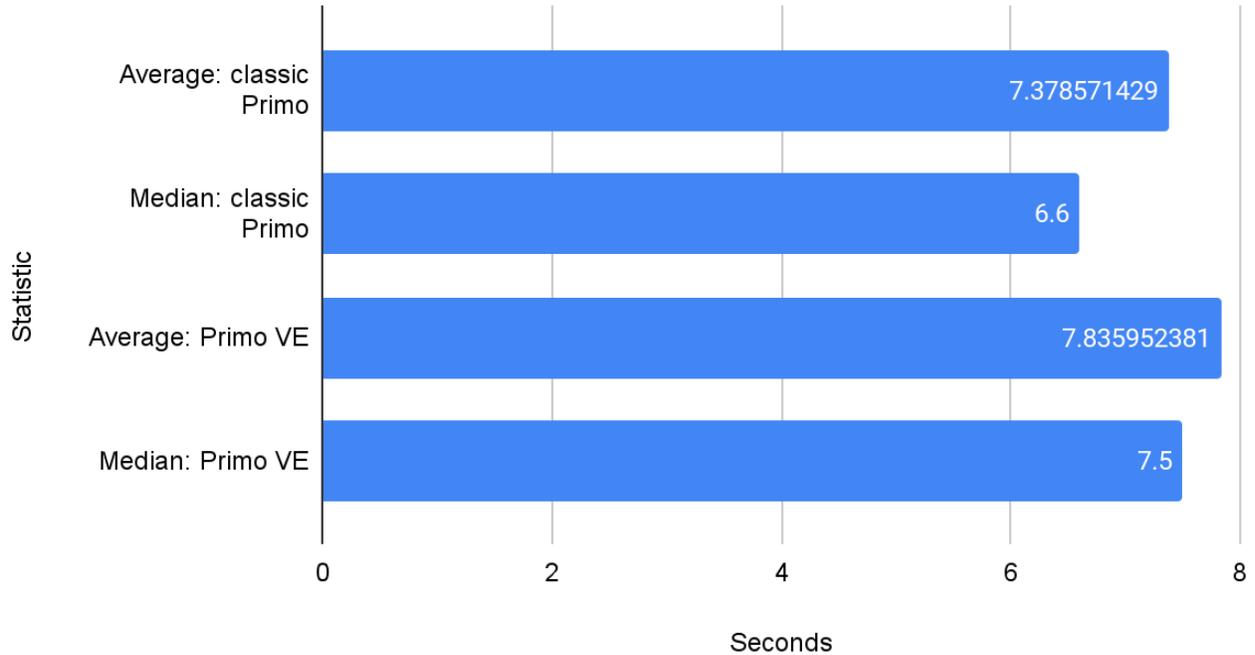


Note: Response rate of 58%.

- **Load Speed**

Load time testing took place around 3 distinct times on different days; a web metrics tool was used to analyze analogous classic Primo and Primo VE pages. A 2-tailed paired *t*-test was run on the results; there was no statistically significant difference between the two products.

Load Testing

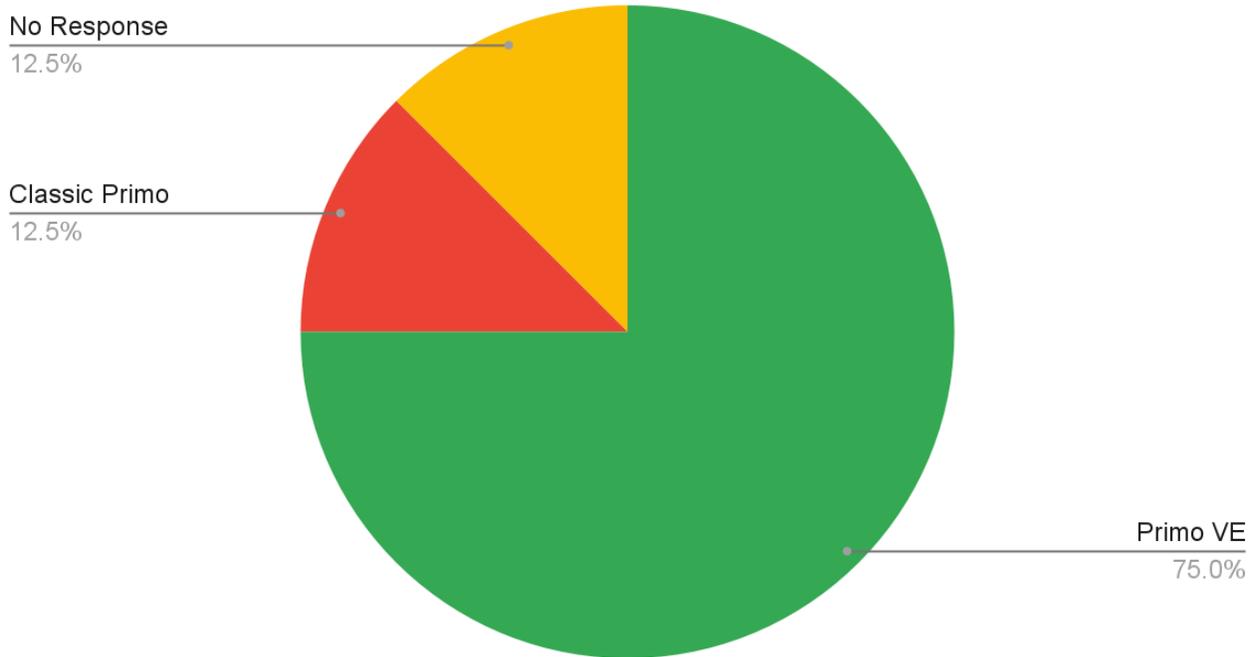


Note: Response rate of 92%

- **Straw Poll**

Results from the straw poll were clear but not unanimous. Eighteen (75%) libraries thought the CSU Libraries should use Primo VE, three (13%) thought the CSU Libraries should remain using classic Primo. While there is debate about the ideal timing of a migration to Primo VE, straw poll results and email comments showed the majority of campuses are in favor of the transition.

Straw Poll



Note: Response rate of 88%.

The committee would be remiss if we did not note that a vocal minority of campuses expressed reservation over the timing of a possible transition to Primo VE. It was widely recognized that Primo VE offers benefits over classic Primo but that a summer 2021 transition would require extensive support. *Such support would need to come from their local Deans or supervisors prioritizing VE over other work, or from the Chancellor's Office SDLC staff.* While we understand hesitancy and workload concerns, the data demonstrates a consensus among libraries supportive of migration.

More detailed results, including charts, were presented at the [April 30th Go VE Forum](#). Raw data is available [online](#).

What benefits does Primo VE offer?

- Integration with Rapido and Esploro customers.
- Unified back-end management of Primo and Alma.
- Reduction of duplicated administration processes.
- Major operational improvements and the streamlining of publishing processes
- Real-time discovery of records created in Alma.
- Enhanced Journal Search with features not available in Primo
- Using import profiles instead of complex harvesting pipes to bring in external data (e.g. repositories, special collections, etc.).
- Primo Analytics is accessible from within Alma.

Are there outstanding issues with Primo VE?

- Yes, as was the situation with the 2017 Primo migration, there are some outstanding issues.
- [A tracking sheet](#) is available on the ULMS Discovery confluence page that includes resolved and unresolved issues from project management discussions with our Ex Libris support team.
- Some issues remain but are either being addressed through support cases, product development, or expected to be fixed in upcoming Primo VE releases.

What do campuses need to do for the switch?

- The Discovery Functional Committee will provide campuses with a detailed checklist of tasks to be completed prior to the switch. Some [tips](#) documentation is already available.
- Final configuration of Primo VE will require a commitment of time by library personnel.

What support will be provided?

- The Chancellor's Office, in conjunction with various ULMS task forces, will continue to provide central support to campuses.