

**NDSU** NORTH DAKOTA  
STATE UNIVERSITY

STUDENT FOCUSED • LAND GRANT • RESEARCH UNIVERSITY

# Primo VE Migration @ NDSU

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# Some Background...

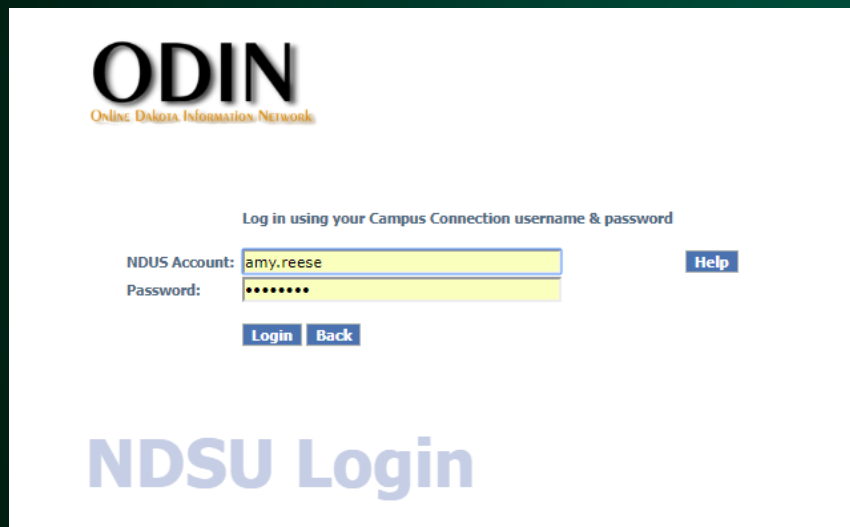
- NDSU is part of the ODIN consortium
- NDSU is the only consortium member currently using Alma
- An RFP is in process for a new ILS/LSP



# Our Major Challenges:

- Move to new UI in classic Primo in advance of starting the Primo VE project
- Copy our settings from classic Primo – from our consortial setup with ODIN
- Change authentication from PeopleSoft-based authentication to CAS

# Change in Authentication



**ODIN**  
Online Dakota Information Network

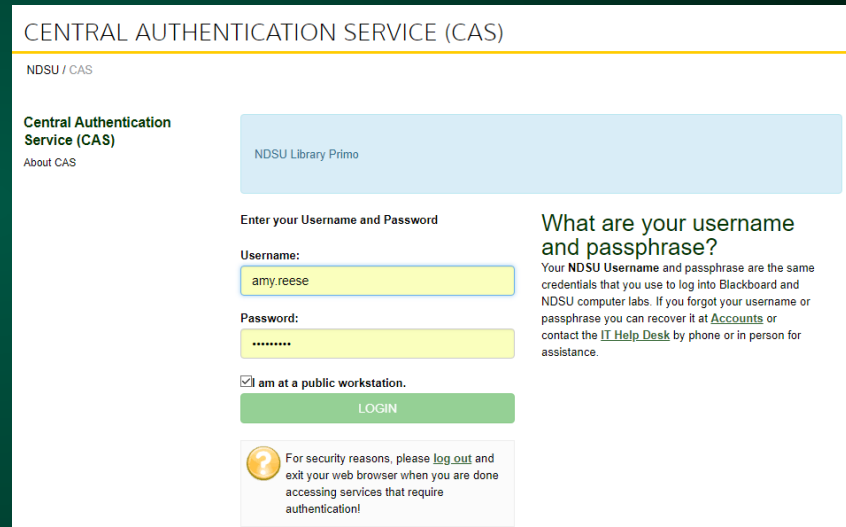
Log in using your Campus Connection username & password

NDUS Account:  [Help](#)

Password:

[Login](#) [Back](#)

## NDSU Login



CENTRAL AUTHENTICATION SERVICE (CAS)

NDSU / CAS

**Central Authentication Service (CAS)**  
[About CAS](#)

[NDSU Library Primo](#)

Enter your Username and Password


Username:

Password:

I am at a public workstation.

[LOGIN](#)

**What are your username and passphrase?**  
Your NDSU Username and passphrase are the same credentials that you use to log into Blackboard and NDSU computer labs. If you forgot your username or passphrase you can recover it at [Accounts](#) or contact the [IT Help Desk](#) by phone or in person for assistance.

 For security reasons, please [log out](#) and exit your web browser when you are done accessing services that require authentication!



# Pre-Project Timeline

- 3/13 – opened a ticket requesting the move to Primo VE
- 5/15 – moved to the new UI
- 6/5 – Primo VE project kick-off
- 6/12 – initial meeting with the project manager

# Proposed Timeline from Ex Libris

Milestone	Due Date/Notes
Kick off meeting	June 5 2018
Activate Primo VE on 01NDSU Alma Production <ul style="list-style-type: none"><li>Alma data</li><li>2 digital repositories</li></ul>	June 12 2018
<b>Work with 01NDSU to configure Primo VE</b> <ul style="list-style-type: none"><li>Ex Libris to copy basic configuration</li><li>01NDSU to watch training materials and learn configuration options and menus</li><li>Ex Libris/01NDSU to redefine AUTH</li><li>01NDSU to examine Primo VE</li><li>Regular calls (weekly; per need)</li></ul>	June 12 – July 12, 2018
01NDSU Acceptance for Primo VE	July 12, 2018
Go Live with Primo VE	July 15 2018
One-month post go-live support Primo VE sandbox is created	August 15 2018
Decommission classic Primo	August 15 2018

# Actual Timeline

- 6/12 – begin work to change authentication



A screenshot of a user profile page for 'Reese, Amy'. The page shows account details such as 'Primary Identifier: 8002106', 'Account Type: External', and 'User group: Faculty/Staff'. Below this is a 'User Information' section with fields for 'First name \* Amy', 'Middle name L', 'Last name \* Reese', and 'Primary identifier \* 8002'. A red arrow points from the '1234567' on the ID card to the '8002' in the 'Primary identifier' field.

A screenshot of an 'Audit' log table. The table has columns for 'Active', 'ID Type', 'Value', and 'Note'. It shows two entries: a 'Barcode' with value '8002 00' and a 'University ID' with value '524'. A red arrow points from the '8002' in the user profile to the '8002 00' in the 'Value' column of the first row.

Active	ID Type	Value	Note
<input checked="" type="checkbox"/>	Barcode	8002 00	-
<input checked="" type="checkbox"/>	University ID	524	-





# Summary of Authentication Changes

- Switched from PeopleSoft to CAS
- Rewrote our load script
- Changed what fields were being loaded from the Registrar's file
- Modified firewall access to accommodate the new Primo VE host

Configuring

North Dakota State University

Filter List

Look-up or select



Acquisitions

Resources

Discovery

Fulfillment

User Management

General

Analytics

### Search Configuration

[Search Profiles](#)

[Restricted Search Groups](#)

### Display Configuration

[Configure Views](#)

[Manage Local Fields](#)

[Local Resource Types](#)

[Manage Tags](#)

[Labels](#)

### Getit Configuration

[Digitization Request](#)

[Hold and Booking Request](#)

[Purchase Request](#)

[Resource Sharing Request](#)

[Items Display configuration](#)

[Holdings Display Labels](#)

[Holdings Display Configuration](#)

### Authentication

[User Authentication](#)

[Restricted User Groups \(Central Index / Ebsco\)](#)

### Loading External Data Sources

[Normalization rules for External Data sources](#)

[Test Normalization Rules](#)

[Normalization Process Task](#)

[Discovery Import Profiles](#)

[Dublin Core type to Discovery Type mapping](#)

### Other

[Resource Recommender Configuration](#)

[Central Index and proxy set-up](#)

[Primo Deep-Link Re-Redirect Configuration](#)

[Suppress Dedup/FRBR](#)

[Dedup and FRBR Test Utility](#)

[Customer Settings](#)

# Discovery Import Profiles

Import Profiles Monitor Imports Back

Institution **Community**

1 - 3 of 3   + Add New Profile 📄 ⚙️

Profile type: **Discovery**

ID	Status	Profile name	Profile description	Profile Type	Contributed by	
1 7530849830001321	Active	ArchivesSpace	ArchivesSpace	Discovery	-	...
2 7263956540001321	Active	CDM	CDM DR	Discovery	-	...
3 7263957800001321	Active	DSPACE	DSPACE	Discovery	-	...

# Views

The image displays two screenshots from the Alma system. The left screenshot shows the 'View Configuration' page for '01ODIN\_NDSU:ndsu'. The right screenshot shows the search results for 'banana fusarium'.

**Annotations:**

- Red box:** Points to the 'Links Menu' tab in the configuration page and the 'NEW SEARCH' button in the search header.
- Magenta box:** Points to the 'Search Profile Slots' tab in the configuration page and the search dropdown menu in the search results.
- Green box:** Points to the 'Brief Results' tab in the configuration page and the 'Refine my results' sidebar in the search results.

**Configuration Page Details:**

- View Name: 01ODIN\_NDSU:ndsu
- Tabs: Links Menu, Search Profile Slots, Advanced Search Configuration, Brief Results, Brief Record Display, Full Record Services
- Define View: Code \* 01ODIN\_NDSU:ndsu, Name \* ndsu, Description ndsu
- General Attributes: Time-out URL, Timeout (in minutes) for signed in users \* 30, Default Language \* English

**Search Results Page Details:**

- Search Term: banana fusarium
- Results: PAGE 1 4,470 Results
- Refine my results sidebar: Expand My Results, Sort by Relevance, Publication Date (1910 to 2018), Resource Type (Articles(2,497), Dissertations(858), Text Resources(24), Reviews(26), Reference Entries(25)), Subject (Agriculture(2,099))

# Changing Labels

< All Code Tables Cancel

You are configuring: North Dakota State University [Change Organization Unit](#)

Search for Labels  Look-up o Language **English** Search Clear Search

Table Name	Description	Description	Updated By	Customized	
1 <a href="#">Advanced Media Type Labels</a>	Discovery UI Labels	Advanced Media Type Labels	reese	✓	...
2 <a href="#">Advanced Search Index Fields Labels</a>	Discovery UI Labels	Advanced Search Index Fields Labels	exl_impl	✓	...
3 <a href="#">Advanced Search Languages Labels</a>	Discovery UI Labels	Advanced Search Languages Labels	-		...
4 <a href="#">Aria Labels</a>	Discovery UI Labels	Accessibility aria labels	reese	✓	...
5 <a href="#">Browse Search Labels</a>	Discovery UI Labels	Browse Search Labels	-		...

# Journal Search

**NDSU** LIBRARIES NEW SEARCH **JOURNALS** DATABASES RESEARCH GUIDES BROWSE INTER LIBRARY LOAN ... Sign in Menu

Journal Search Nature

Sign in to get complete results and to request items Sign in DISMISS

PAGE 1 103 Results

1 **JOURNAL**  
**Nature (Online)**  
Nature Publishing Group.  
1869  
[Available Online >](#)

2 **JOURNAL**  
**Nature (London, England)**  
Lockyer, Norman, Sir, 1836-1920.  
1869

**Refine my results**

Sort by Relevance ▾

**Availability**

Available online

Available in print

# And We're Live!

The screenshot displays the NDSU Libraries website interface. At the top, a dark navigation bar contains the NDSU logo, 'LIBRARIES', and menu items: 'NEW SEARCH', 'JOURNALS', 'DATABASES', 'RESEARCH GUIDES', 'BROWSE', and 'INTER LIBRARY LOAN'. On the right side of the navigation bar are icons for a refresh button, a pushpin, a 'Sign in' link, and a 'Menu' dropdown. Below the navigation bar is a large search bar with the placeholder text 'Search anything' and a magnifying glass icon. To the right of the search bar is a link for 'ADVANCED SEARCH'. The main content area is divided into two columns. The left column features a video player titled 'Searching the Library Catalog' with a play button overlay. The video thumbnail shows a search interface with the query '#sleep deprivation' and a book cover for 'Harriet Ostbye Diaries Mounted On Digital Horizons'. The right column is titled 'Where can I get help?' and contains the text: 'Ask your Librarian how to start your search.', 'Live Chat with the current reference librarian on duty.', and 'General Phone Numbers'. Below this text is a list of phone numbers: 'Circulation: (701) 231-8888', 'Reference: (701) 231-8886', and 'Administration: (701) 231-8753'. At the bottom of the right column is a vertical list of help options: 'See all Staff', 'Location and Hours', 'Subject Librarians', and 'Live Chat'. A yellow 'Leave a message' button is located at the bottom right of the page.

**Searching the Library Catalog**

How to Search the Library Catalog

NDSU LIBRARIES

Research Services Locations Collections About Tutorials

Search anything

ADVANCED SEARCH

Where can I get help?

Ask your Librarian how to start your search.

Live Chat with the current reference librarian on duty.

**General Phone Numbers**

- Circulation: (701) 231-8888
- Reference: (701) 231-8886
- Administration: (701) 231-8753

See all Staff

Location and Hours

Subject Librarians

Live Chat

Leave a message

**How does NDSU Search work?**

NDSU Search provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more.

NDSU Search also helps you manage your research. Sign-in

ExLibris Knowledge Center

More Sites System Status Submit a Case

SELECT A PRODUCT Search

Browse by product:

Alma **Primo** Summon Rosetta

Welcome to the including docum

Community Knowledge  
Learn from other customers' experience, access customer contributed articles and share your own expertise

Content Corner  
Primo Central

Product Documentation  
Access the latest documentation for Ex Libris products

**Training**  
Learn new skills and get certified with our tutorials, recorded training and other materials

## Training

Primo Training  
If you are accessing Primo discovery configuration via the Primo Back Office, please watch these trainings.

Primo VE Training  
If you are accessing Primo discovery configuration via Primo VE (Alma), please watch these trainings.

Formation Primo VE (Français)  
Si vous accédez à la configuration de l'outil de découverte Primo via Primo VE (Alma), veuillez visionner ces formations.



# Questions?

# Primo VE Migration @ NDSU

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