The Go VE Process
In a Consortial Context :
A Feedback

Igelu Conference 2022, Cardiff
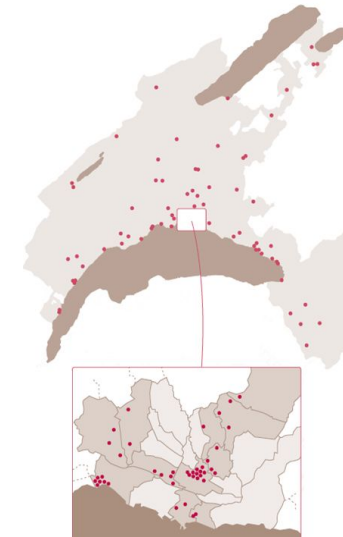
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Plan

- The Renouvaud network

- Switching to Primo VE: Our project

- Example: Filtered view for a library

- Some tips to save time

- Unsolved bugs at the go-live

- One year after our go-live…

The Renouvaud network

- ## 140 libraries in the canton of Vaud (Switzerland)
  Academic, Heritage, Specialized, Archival, High School, School, Public libraries

- ## 190 000 patrons
  23 % of the inhabitants of Canton Vaud have a Renouvaud account

- ## 12 people (8 FTE) for Alma/Primo administration

- ## *Go-live* on Alma/Primo Back Office in 2016

Alma/Primo architecture

Network Zone

Renouvaud

Institution Zones

85 School and Public libraries

55 Academic, Specialized, Heritage, Archival and High School libraries

Primo

Primo view School library

Primo view School and Public library

Primo view School library…

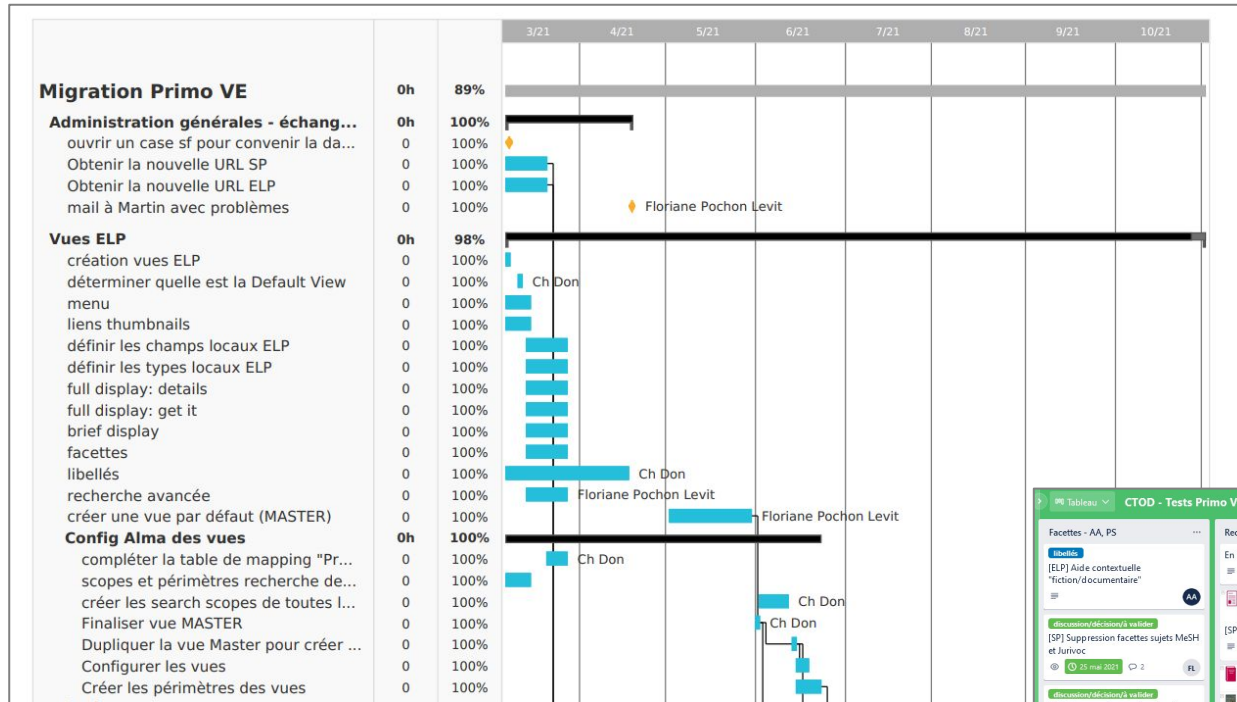Primo view Academic libraries

Primo view High school libraries

61 Primo views

2 Primo views

Switching to Primo VE: Our project

- **Our reasons** for switching to Primo VE:

  o Acquisition of ILL module Rapido

  o Alignment with other Swiss catalogs (Swisscovery, Helveticat)

  o New developments focused on Primo VE

- **Approach**:

  o The switch had to go unnoticed by the users while correcting some conception issues

  o Opportunity to revise our settings

- **Timeline: Enablment** on March 8, 2021 ; **Go-live** on June 21, 2021

- **Team**: 4 admins + Working group for testing on the UI

- **Project management** on TeamGantt (Go VE check list was not detailed enough)

Task management

The Go VE process

- **Enablement of Go VE in the NZ and each IZ:** No problem

- **Working in the production environment:** No conflict except for the General Electronic Services

- **Documentation:** Covers everything but has gaps in some areas (e.g. harvesting external repositories and normalization rules)

- **Ex Libris Support:**

  - No specific support during the Go VE process

  - For non critical issues, may be faster to ask the Primo mailing list instead

- **Domain shared by several Primo institutions** : No redirection of permalinks

Example: Filtered view for a library

Filtered locations in the Get it

Search scope in the library's items

Primo BO

Rule : Exclude monograph records with "check_holdings" in AVA $e

Primo VE : First solution

Define the scope based on a physical inventory

Define the scope based on a local MARC field

Primo VE : Second solution

Suppress from Discovery holdings of high-level records of monograph series

Some tips to save time

- Allow sufficient time to feel the system and test new features

- Take into account the sandbox refresh date

- External sources : use XML instead of Dublin Core source format

Consortia :

- Plan well the local fields to be created in the NZ and/or IZ

- Plan well the dedup keys before the go-live ; suppress the dedup in the NZ

- No need to run the "Recalculate local document types" job both in the NZ and IZ

Unsolved bugs at the go-live

- Favorites (saved records/eshelf) not all migrated

- Ghost records from an external repository still displayed

- No local results with Primo Search API

- No record update due to a bug with the API on Bibliographic records in the Network Zone

- Codes instead of names in the Library facet

Bibliothèque ∧

2852-385324550002852 *(9 778)*

2852-385325810002852 *(6 992)*

2852-385324890002852 *(1 782)*

One year after our go-live…

What we have lost:

- Loss in customization of display/search/facet fields :

  - No definition of indexed fields for default "display fields"

  - No enrichment of bibliographic records

  - No condition on the PNX fields (?)

- Local resource types cannot be defined on holding information

- Some Analytics reports are missing

What we have gained:

- Simplicity of workflows and real-time publication

- Occasion to review our configuration

Thank you for you attention !

Any questions ?