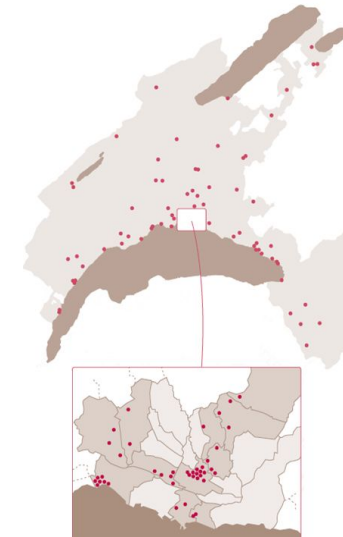


Plan

- 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

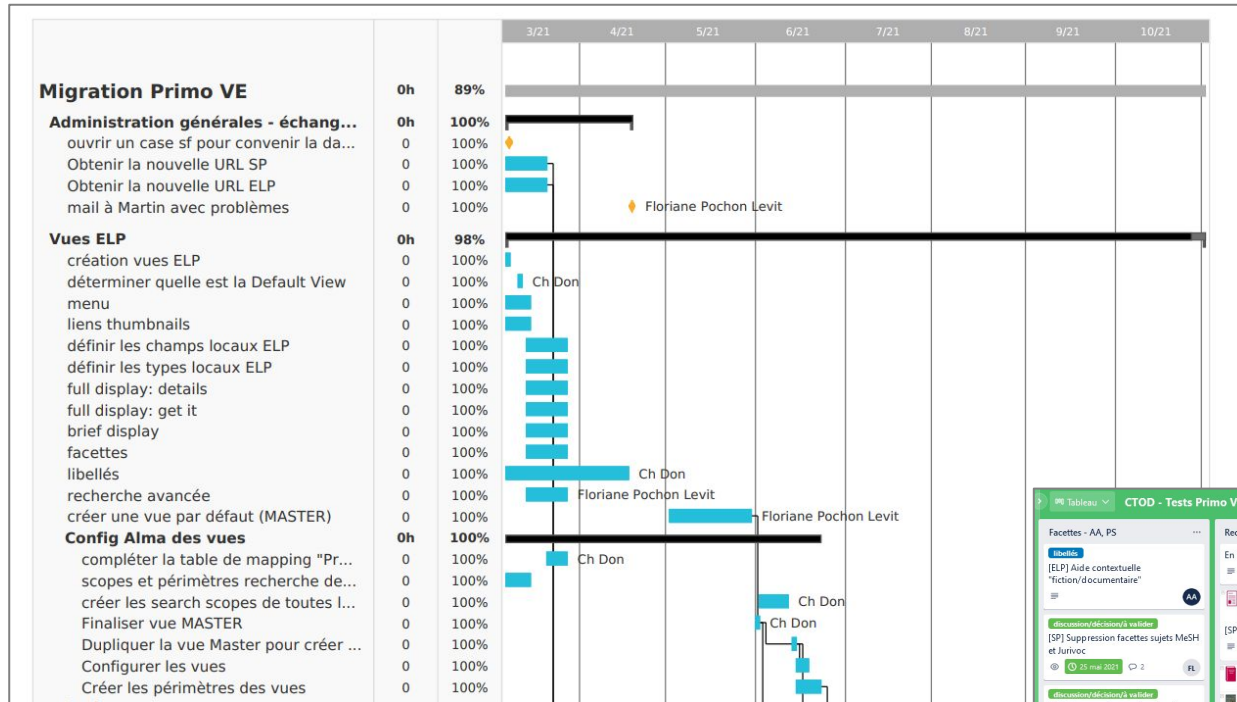
61 Primo views

2 Primo views

Switching to Primo VE: Our project

- **Our reasons** for switching to Primo VE:
 - Acquisition of ILL module Rapido
 - Alignment with other Swiss catalogs (Swisscovery, Helveticat)
 - New developments focused on Primo VE
- **Approach:**
 - The switch had to go unnoticed by the users while correcting some conception issues
 - 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



Facettes - AA, PS
[ELP] Aide contextuelle "fiction/documentaire"

Recherche avancée - AA, PD
En résumé ...

Brief display - AA, PS
[ELP] Type de document / facette "Kamishibai"

Full display - AA, PS
[ELP] Une fois le bouton "Découvrir les exemplaires d'autres bibliothèques" cliqué, il ne semble pas y avoir de moyen de revenir en arrière facilement.

Couvertures - FSC, AA

Réservoirs moissonnés - AA, PD
[SP] ORFEE

Portail BDD - JS, AB

Export / citations - JMT
La fonction côté APA7 fonctionne mieux (éditeur présent)

Export / citations - JMT
De manière générale: Citations - Vancouver: un espace inutile après le titre.

Export / citations - JMT
De manière générale: Citations - APA7: un espace inutile après le titre lorsque celui-ci n'est pas suivi par une info d'édition.

Export / citations - JMT
Citation = export RIS - APA7: 1 éditeur scientifique: il manque la mention (Ed.) ou (Ed.) après le nom de l'éditeur scient.

Export / citations - JMT
Citation = export RIS - Vancouver: 1 éditeur scientifique: il manque la mention "éditeur" ou "directeur" après le nom de l'éditeur scient. + Mettre une virgule à la place du point après l'initiale du prénom


Export / citations - JMT
Citation = export RIS - Vancouver: plusieurs éditeurs scientifiques: il manque la mention "éditeurs" ou "directeurs" après le nom des éditeurs scient. + Mettre une virgule à la place du point après l'initiale du prénom.

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

Obtenir

S'identifier pour plus d'options  S'identifier

EMPLACEMENTS : Exemples de ma bibliothèque. [Découvrir les exemplaires d'autres bibliothèques](#)

Rolle
Disponible, ROMANS adultes ; **ORME** >

Filtered locations
in the Get it

Search scope in the library's items

Rechercher

Ma Bibliothèque  

Primo BO

Rule group search_searchscope

Source Type: MARC, Field: AVA, Ind1: , Ind2: , Subfield: Include, b, Enabled

Conditions logic True, **Conditions relation** Or

Condition 1 - Logic False

Condition 1 - Source Type: MARC, Field: AVA, Ind1: , Ind2: , Subfield: Include

Condition1 - Routines General Parameter: , Routine: Check string equals string, Parameter: check_holdings

Condition 2 - Logic True

Condition 2 - Source Type: MARC, Field: AVA, Ind1: , Ind2: , Subfield: Include

Condition2 - Routines General Parameter: , Routine: Check string equals string

Condition 3 - Logic True

Condition 3 - Source Type: MARC, Field: AVA, Ind1: , Ind2: , Subfield: Include

Condition3 - Routines General Parameter: , Routine: Check characters at position

Transformations Transformation: Use mapping table, Parameter: ILS Library Codes

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

```
998 ##$aDupl
AVA ##$0991000957079702853$82245400050002853$a41BCULAUSA_SCHOOL$bgeno$cMangas$dM NAR$eavailable$f19$g6$j811030013$k8$p1$gMédi
AVA ##$0991002948356402853$82276118440002853$a41BCULAUSA_SCHOOL$bleman$cMallettes pédagogiques$dLEM BD KISH$eavailable$f1$g0$
AVA ##$0991002948356402853$82275406260002853$a41BCULAUSA_SCHOOL$btsap$cMangas$dMG NARU$eavailable$f1$g0$jtsap 009$k8$p3$gBibl
AVA ##$0991000957079702853$82245400170002853$a41BCULAUSA_SCHOOL$bglan$cSalle BD : ados$dBD MANGA NARUTO$echeck_holdings$j811
AVA ##$0991000957079702853$82245400290002853$a41BCULAUSA_SCHOOL$bblonay$cJeunesse$dNARU$echeck_holdings$j811080007$g0$ps$gB
AVA ##$0991000957079702853$82253577760002853$a41BCULAUSA_SCHOOL$bvalb$cManga$dM-NARU$echeck_holdings$j811670014$k8$p6$gBiblio
AVA ##$0991000957079702853$82264538780002853$a41BCULAUSA_SCHOOL$bvdccugy$cBandes dessinées$dNaruto$echeck_holdings$j811710002$
AVA ##$0991000957079702853$82258378450002853$a41BCULAUSA_SCHOOL$bvdfoi$cBandes dessinées jeunes$dNaruto$echeck_holdings$j811
AVA ##$0991000957079702853$82269048150002853$a41BCULAUSA_SCHOOL$bvdfoi$cMORRENS Bandes dessinées$dNaruto$echeck_holdings$j81
AVA ##$0991000957079702853$82255597400002853$a41BCULAUSA_SCHOOL$bcrass$cMangas ados$dBD / NARU jaune$echeck_holdings$j8114600
AVA ##$0991000957079702853$82245400200002853$a41BCULAUSA_SCHOOL$brolle$cBD jeunesse$dNARU$echeck_holdings$j811490007$k8$p11$g
AVA ##$0991000957079702853$82264031310002853$a41BCULAUSA_SCHOOL$bsala$cMangas jeunesse - Disponible en livraison.$dM NARU$ech
```

Primo VE : First solution



Define a Custom Scope

Cancel Save

Scope Details

Code * GLA_inventory Name * GLA_inventory

Description Define scope based on inventory Scope Population My Institution Entire Network

Scope Conditions

Clear Conditions + Add a Condition

-	Physical Availability - Library	Equals	Bibliothèque communale et scolaire de Gland	-
---	---------------------------------	--------	---	---

Define the scope based on a physical inventory



Define a Custom Scope

Cancel

Scope Details

Code gland_972 Name gland 972

Description 972 Scope Population My Institution

Scope Conditions

Clear Conditions

-	972	Contains Keywords	vdgla-	-
And	Physical Availability - Library	Equals	Gland	-

Define the scope based on a local MARC field

Primo VE : Second solution



2  **La quête de l'oiseau du temps / texte de Le Tendre ; dessins de Loisel**
Book (Book - Physical) By Le Tendre, Serge (Paris ; Lausanne [et autres] : Dargaud, 1983->)
Subject: Bandes dessinées de fantasy Bandes dessinées
Creation Date: 14.08.2016 20:06:03 CEST
Modification Date: 07.07.2022 15:38:27 CEST

Physical (8) Electronic Digital Other details

5 of 8 Holdings | 0 of 0 items are available

Library	Location
 CPNV	Bandes dessinées
 EPSIC-ERACOM	DGEP-EPER Salle principale
 ETML	DGEP-ETML Bibliothèque
 ETVJ	Bandes dessinées
 Gymnase Auguste Piccard	BD

And others: [Holdings](#)

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



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~~
-

Renouvaud

Réseau vaudois
des bibliothèques

Thank you for you attention !

Any questions ?