



# IMPLEMENTING PRIMO VE IN A CONSORTIAL ENVIRONMENT

FINDING THE BALANCE

American University Library

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# BACKGROUND AND OUR ENVIRONMENT

- WRLC is a group of nine university libraries in the Washington DC metro area.
- Cornerstone services were developed around resource sharing and shared off-site storage facility.
  - Lots of interest in the AFN and how services displayed in Primo VE.
- Previous ILS environment had seven of the members sharing a single Voyager DB with separate instances at each library. One library had its own Voyager DB and another was on Sierra.
- Had an implementation management team with representation from each library which has morphed into a coordination team for the consortium around Alma activities – still getting our footing there.
- Moving to Alma allowed all libraries to be on the same platform and included most of our law and medical libraries.
- 18-month implementation schedule and 1st consortium to go live with Primo VE.

# TECHNICAL ISSUES AND MENTAL HURDLES AROUND OUR IMPLEMENTATION

- Technical Issues:
  - Functionality with Automated Fulfillment Network was still very early in development to meet some of our specific needs.
  - Significant issue around the loading of our electronic resources.
  - Difficulties in implementing process of managing materials in our Shared Collections Facility.
- Mental Hurdles:
  - Primo VE tied to configuration in Alma – no Primo Back Office
  - Unlike Voyager, Alma/Primo is in a state of constant development – what doesn't work today may be fixed in next month's release.
  - Gaps between our current workflows and Ex Libris' recommendations, which are based on what Alma does well. Sometimes those gaps are easy to navigate, sometimes more complicated.

# I WISH WE WOULD HAVE DONE " \_\_\_\_\_ " DIFFERENTLY...

- Started out with a stronger idea of what we wanted out of the system in terms of possibilities for collaboration.
  - Struggled some with understanding what Alma does and how it does it and that translates to Primo VE.
  - Knew what we wanted as non-negotiable functionality, still wasn't designed to do exactly what we wanted in some cases, which impacts how services are delivered through Primo.
  - Probably still should have engaged in more conceptual work of what we wanted to achieve – working a bit backwards on that now.
  - Discussions of Centralization vs. Decentralization in certain types of workflows.

# USING THE AUTOMATED FULFILLMENT NETWORK IN PRIMO VE


- IZ Implementation:
  - Establishing linked records for users
  - Redefining our relationship with off-site storage
  - Where do rules belong? Institution vs Network
- NZ Implementation:
  - Shared configurations distributed from the Network Zone e.g. letters and WRRLC fulfillment unit
  - Addition of professional libraries, not all of which lend via the AFN
  - Recreating a resource sharing system that developed over decades in a matter of months

My Library Account

OVERV... LOANS REQUESTS FINE + FEES BLOCKS + MESSAGES PERSONAL DATA

Loans Previous and historic loans

1 loans

 The edible garde... Fowler, Alys,	Return Date: 10/22/2018, 15:29 Pick up: Fenwick Librar...
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The unintended consequences of IZ configs not being aligned.

# ALIGNING CONFIGURATIONS ACROSS ALL 15 INSTITUTION ZONES

# IMPLICATIONS OF USING THE AFN IN PRIMO VE FOR PATRONS AND LIBRARY STAFF

The screenshot shows a web form titled "Consortium Loan Service Request". The form includes the following fields and options:

- Request Type:** Radio buttons for "Book" (selected) and "Article".
- Title:** Text input field containing "Handbook of edible weeds /".
- Email:** Text input field containing "Use different email" with a dropdown arrow.
- Pickup at Institution:** Text input field containing "American University" with a dropdown arrow.
- Not needed after:** A calendar icon followed by a text input field containing "Pickup Date" with a dropdown arrow.
- Comment:** Text input field.

- Hurdles to providing the new consortium loan service:
  - Fine collection
  - Consortium renewals
  - Expiration of linked accounts
- Problems with request form: don't touch that field!
  - Large increase in ILL requests as we navigated these issues
- Managing patron expectations – the new "My Library Account"

# LOCATING AND ACCESSING LIBRARY MATERIALS IN PRIMO VE

LIBRARY SEARCH LIBRARY HOME BROWSE BY ... DATABASES SUBJECT GUIDES FIND JOURNALS REPORT A PROBLEM

My Library Account **American University**

OVERVIEW LOANS REQUESTS FINE + FEES BLOCKS + MESSAGES PERSONAL DETAILS

Loans **RENEW ALL** Fine + fees

1 Jitterbug perfume / Robbins, Tom. Due: 11/02/2018, 21:00 Pick up: American University Library Library...

My Library Account **American University**

OVERVIEW LOANS REQUESTS FINE + FEES BLOCKS + MESSAGES PERSONAL DETAILS

Loans

1 Jitterbug perfume / Robbins, Tom. Due: 11/02/2018, 21:00 Pick up: American University Library Library...

- American University
- Catholic University of America
- The University of the District of Columbia
- Gallaudet University Library
- George Mason University Libraries

LIBRARY SEARCH LIBRARY HOME BROWSE BY ... DATABASES SUBJECT GUIDES FIND JOURNALS REPORT A PROBLEM Shane Hickey

My Library Account

OV... LOANS REQUESTS FINE + FEES BLOCKS + MESSAGES PERSONAL DETAILS

American University

Catholic University of America

The University of the District of Columbia

George Mason University Libraries

Georgetown University

George Washington University

Howard University

Marymount University

Shared storage institution

Loans **RENEW ALL**

1 Handbook of edible weeds / Duke, James A., Due: 01/31/2019, 23:00 Pick up: American University Library Libra...

2 The food explorer : the true adventu... Stone, Daniel Due: 01/31/2019, 23:00 Pick up: American University Library Popu...

3 Cook beautiful / Calderone, Athena, Due: 01/31/2019, 23:00 Pick up: American University Library Libra...

**VIEW ALL 31 LOANS**

ILL Requests Sign in to Interlibrary Loan to view your ILL account information. **Sign into Interlibrary Loan**

Fine + fees There are no fines

Requests There are no requests

Blocks + messages There are no blocks or messages



# SERVICE PROBLEM: WHEN YOU PUT OUT A SYSTEM THAT'S NOT QUITE READY



## SUPPORTING SERVICE DESK TRANSITION TO PRIMO VE

- Incorporate stakeholders into user testing program
- Training—give strategies for talking to users
- Status page for known issues
- Troubleshooting support priority
- Direct communication with users

# AU LIBRARY PRIMO STATUS PAGE

University Library > Known Issues with AU Library Search

[Library Home](#)

[My Library Account](#)

[Ask a Librarian](#)

[Start your Research](#)

[Collections](#) 

[Services](#) 

[Hours](#)

[Events](#)

[About the Library](#)

## EBSCO DATABASES

Links from AU Library Search to Ebsco databases are not working consistently. We are working with Ebsco to find a resolution. The best work-around is to go directly to an Ebsco database from the Databases A-Z list.

## "ADD TO FAVORITES" FUNCTIONALITY

"Favoriting" a record not owned by AU doesn't add the record your favorites list

## "AVAILABLE ONLINE" LINKS

Some ebooks say they are available online, but under "view online" there is no link. All other "available online" links just lead to the empty "view online" section.

## REQUEST SUBMISSION

## KNOWN ISSUES

This page displays any issues with AU Library Search that have already been reported and are currently being investigated. This list is updated every Monday at 11:00am.

## RELATED LINKS

[AU Library Search homepage](#)

[Report a Problem](#)

# WRLC CONSORTIUM TASK FORCES

- Primo Implementation Task Force
  - Standardizing configuration and language
  - Identifying issues to report
  - Training
- Primo Communication Task Force
  - Bank of marketing pieces
  - Contingency communication plans