

## ERM-202: Troubleshoot Discovery

## Exercises for Attendees

Note: This exercise does *not* need to be practiced in your sandbox; you can use your production environment. Also: The exercise works equally well in Summon and Primo VE.

## Exercise: Troubleshoot Real Discovery Problems

- 1. Find some patron- and staff-reported discovery problems. Ask around to your library colleagues, or collect some reports that have been sent from patrons letting you know about discovery issues.
- 2. Try to determine the cause of the discovery issues, using the workflows you saw during the session, and based on the symptoms of the problem in your discovery service:
  - a. E-resource doesn't show up at all:
    - i. Check for the resource on the vendor site (access provider)
    - ii. Check if the resource exists in the Community Zone (CZ)
    - iii. Check if the resource is activated your Institution Zone (IZ)
    - iv. For serials, check if the coverage (dates for availability and embargoes in your IZ portfolios) include the resource.
  - b. E-resource link is broken
    - i. Check if the resource's collection only has journal-level or title-level linking
    - ii. Check if the resource's parser parameters (etc) are correct
    - iii. See documentation for other things to check:
      - 1. <u>What Are the Common Causes of Full Text Linking Problems, and How Can</u> <u>Linking Be Improved?</u>
      - 2. How To Report Full Text Linking and Availability Problems to Support
  - c. E-resource requires a login at vendor's site
    - i. Check if the resource's service or portfolio has proxy set correctly

Good luck, and let us know next week how these suggestions work for you!

