

## Troubleshooting Electronic Resources in Alma & Primo

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**ExLibris**  
 a ProQuest Company

### Introductions

- Sharai Perkes, MLIS, Sr. Training and Consulting Partner**  
 Sharai is a Global Education Team member who designs, develops and delivers training programs that enable library staff to master new products and technologies. She joined ProQuest in 2009 after completing her MLIS at the University of Washington iSchool. Prior to that, Sharai was a software developer for 11 years.
- Amanda Schriver, MLIS, Alma Support Analyst**  
 Amanda has over 6 years of experience working in academic libraries and higher education. She has been working at Ex Libris as an Alma Support Analyst since 2015. She received her MLIS from Dominican University.
- Carolyn Sprague, MLS, Training Consultant**  
 Carolyn Sprague is a Training Consultant with the Global Education team. Carolyn has worked at Ex Libris for 9 years and was previously a Primo implementation consultant. Carolyn received her MLS from Simmons College Boston.

## Objectives and Target Audience

- This session will discuss management and interaction of Electronic resources in Alma, Primo & Primo Central.
- Session Objective(s)
  - By the end of this sessions you will understand.
    - The interaction of different systems in the management of electronic resources
    - Basic troubleshooting workflows
    - How to identify important metadata from Primo Central and Alma records that can aid in troubleshooting
- Session Target Audience:
  - Electronic Inventory Operators
  - Repository Manager



### Functional User Group / Roles

- **Electronic Inventory Operator**
- **Electronic Inventory Operator Extended**  
(required for delete operations)
- **Repository Manager**  
(required for assign electronic resource activation tasks to others)

## Agenda

**1*****Introduction*****2****Record Matching****3****Troubleshooting Workflows and Examples****4****Metadata Analysis-Primo Central PNX / Alma Context Objects****5****Next Steps, Support Resources and Survey**

## Introduction

### Electronic Resources Management



## Introduction: Electronic Resource Management

- The library's electronic resources are managed in:

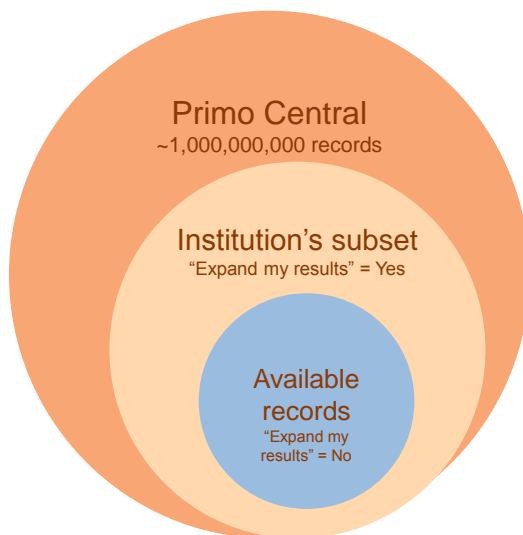


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## Introduction: Primo Central



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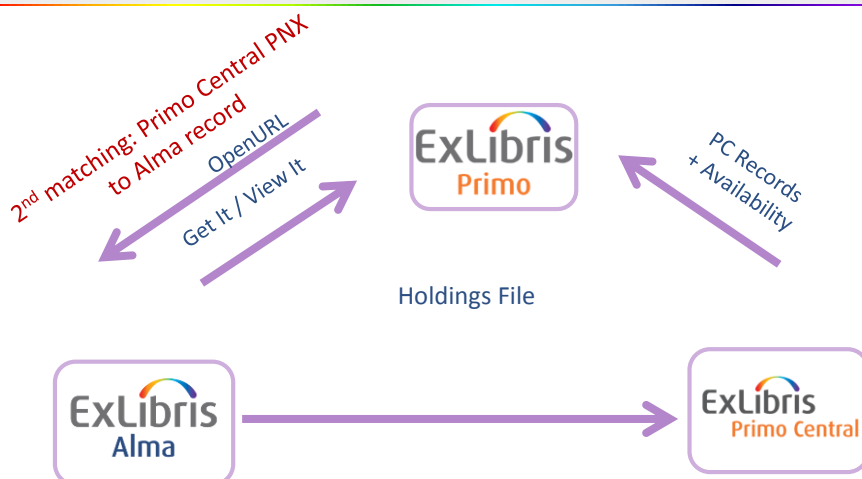
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## Introduction: Alma Holdings to Primo Central



1. Sign up for resource collections in PC (at implementation)
2. Maintain catalog and inventory in Alma (around the clock)
3. Holdings File publishing, harvesting & availability processing (weekly)

## Introduction: Primo Central (via Primo) to Alma



## Record Matching



### 1<sup>st</sup> Matching: Alma Holdings to Primo Central

- ***(Identifier OR Title) AND Coverage***
  - **Identifier:** ISBN, EISBN, ISSN, EISSN
  - **Title** (if identifier didn't match):  
Titles undergo Normalization (for titles which are not common)
  - **Coverage:** Threshold, Embargo, year information
  - The holdings file may contain more than one coverage. One is enough to declare a match



## 2nd Matching: Primo Central PNX to Alma



OpenURL (from PC **PNX addata**) to Alma's **record** (Alma Link Resolver) Alma decides **delivery**.

Two possible types of matching:

- a) OpenURL **contains identifier**
  - a.1) Try matching **Identifier** (in the following order: ISSN, eISSN, ISBN, eISBN, coden, LCCN, OCLC)
  - a.2) If no match was found match **Title + Author**
- b) OpenURL **without identifier**
  - Match **Title + Author + Genre** (to PC **Genre**) (serial/monograph)

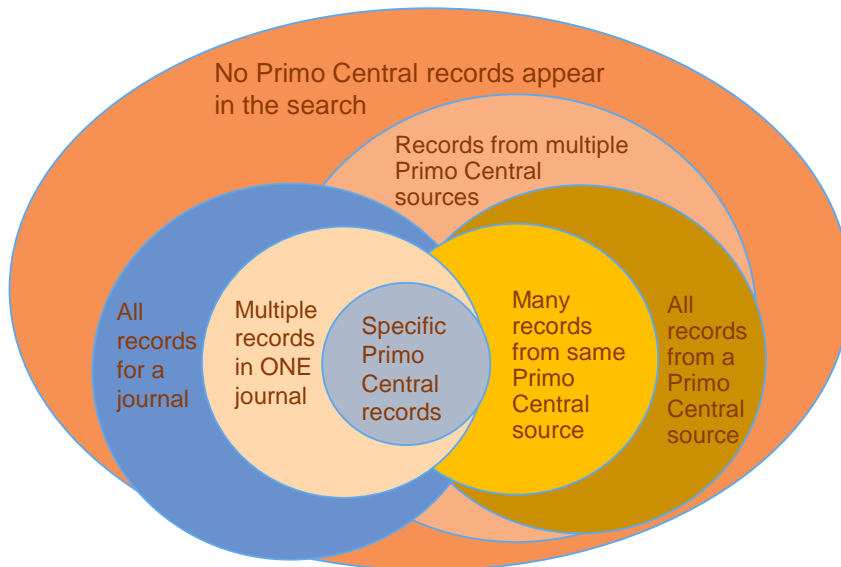


## Troubleshooting Workflows and Examples





## Troubleshooting Tip: Scope



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## Troubleshooting tip: Scope

Problem: Scope	What to Suspect	What to Troubleshoot
Broken links: single record or journal	Metadata!	<ul style="list-style-type: none"> <li>Metadata mismatch (Primo Central vs. Full-text vendor)</li> </ul>
Missing content: multiple records in a journal	Coverage!	<ul style="list-style-type: none"> <li>Coverage dates activated in Alma</li> </ul>
Missing content: all records in a journal	Activations or Metadata!	<ul style="list-style-type: none"> <li>Alma activation</li> <li>Primo Activation</li> <li>Metadata mismatch (Primo Central vs. Alma)</li> </ul>
Missing content: all records in a source	Activations!	<ul style="list-style-type: none"> <li>Primo Central activations</li> <li>Alma activations</li> </ul>
Broken links: many records in a source	Link Resolver!	<ul style="list-style-type: none"> <li>Alma linking parameters &amp; augmentation profile</li> <li>Alma link resolver error</li> </ul>
Missing content: all article records	Primo Configuration!	<ul style="list-style-type: none"> <li>Primo Back Office: scope, view &amp; registration</li> </ul>

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## Example 1: Full Text Article Missing from Primo Search

### The Customer Report:

- Article is found when results are expanded.
- Shows the no full-text available.
- Article should be found in default Primo search with a full-text indicator.
- Confirmed activation in **Primo Central**.

### The Diagnosis:

- Collection not activated in Alma.
- Journal not in Alma Holdings File published to Primo Central.
- Primo can't know that full-text is available.

### The Solution:

- **Activate the collection in Alma.**

### Alternate Diagnoses:

- Primo Central update cycle not complete.
- Holdings File stuck.



## Example 2: Full Text Article Missing from Primo Search

### The Customer Report:

- Article only found in Primo with expanded results.
- No full-text indicator.
- Journal activated in **Primo Central** and **Alma**.
- Alma publishing job and Primo Central update completed.
- Additional detective work shared by customer:

- Alma Bib Record Metadata

Journal of geophysical research. Oceans.  
022 \_\_\_ |a 2169-9275  
022 \_\_\_ |e 2169-9291

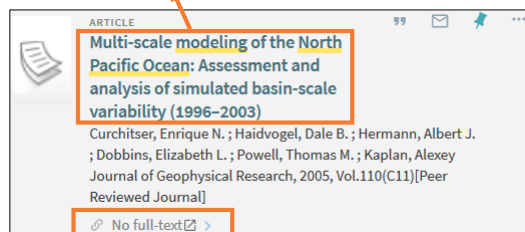
Alma ISSN match publisher web site.

- Primo Central Index (PCI) Metadata

ISSN: 0148-0227

### The Diagnosis:

- Bad ISSN in Primo Central Index.
- No match between Alma Holdings File and Primo Central.
- Primo can't know that full-text is available.



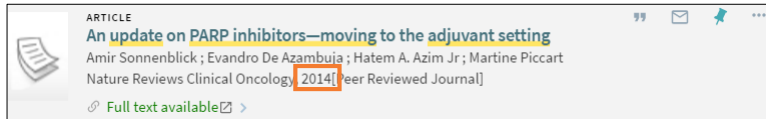
### The Solution:

- **Primo Central Operations fixed the ISSN in the Primo Central Index.**

### Example 3: Broken Link to Full-text Article

#### The Customer Report:

- Article shows full-text in Primo search results.
- Some, but not all, full-text links on **Get It** tab or area result in errors.
- Journal coverage dates are correct for all of the collections with links.



#### The Diagnosis:

- This journal was published online in 2014 and in print in 2015.
- Some vendors use 2014 and others use 2015 for linking.
- Both are right!



#### The Solution:

- **Library User Education: Teach researchers not to give up when links break! First, try other links on the Get It tab. Then, try searching the database directly.**

### Example 4: Collection Missing from Primo Search

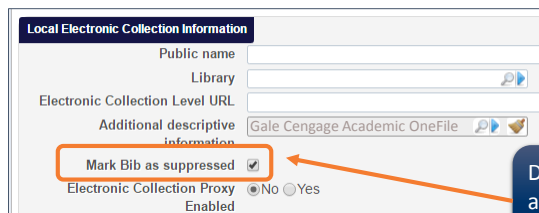
#### The Customer Report:

- Activated two collections a few weeks ago:
  - Project MUSE Premium Collection
  - Gale Cengage Academic OneFile
- Can find articles from these sources in Primo.
- Can **not** find the collections when we search Primo for the collection names.



#### The Diagnosis:

- The collection's bib record is suppressed in Alma.
- Record not published to Primo Central for discovery.



Default setting when activating collections from Community Zone.

#### The Solution:

- **Unsuppress the collection's bib record in Alma.**

## Example 4 (Cont.) How to Unsuppress Collection Bib Record

The screenshot shows the Primo Back Office interface. At the top, there's a 'Sort by Rank' dropdown. Below it, a record for 'Gale Cengage Academic OneFile' is displayed with details like 'Type: Aggregator package', 'Services: Full Text (Available)', 'Creation Date: 2017-04-11 16:01:11', and 'Modification Date: 2017-04-11 16:01:11'. A toolbar contains links like 'Edit Collection', 'Descriptive Record', 'Delete', 'View', 'Portfolio List (8903)', 'Order', 'Publishing information', 'Edit Service', 'View It', 'Report To Ex Libris', 'More info', and 'Create E-Activation Task' (highlighted with an orange box).

Below this, the 'Electronic Resource Activation Task List' is shown. It has tabs for 'Assigned to Me', 'Unassigned', and 'Assigned to Others'. The 'Status' is 'Opened Tasks'. A table lists tasks with columns: MMS ID, Title, Type, Status, Expected Activation Date, PO Line Owner, Order Line, and Not. The first task is highlighted in yellow. An 'Actions' menu is open for this task, showing options like 'View', 'Edit', 'Edit Resource', 'Test Access', 'Unsuppress' (highlighted with an orange box), 'Assign to', 'Release assignment', 'Done', and 'Delete'.

At the bottom, there's a footer with '© 2017 Ex Libris | Confidential & Proprietary', the page number '23', and the 'ExLibris' logo.

## Example 5: All Journal Articles Missing from Primo Search

### The Customer Report:

- It's an emergency: suddenly we can't find any articles in Primo!
- All we can find are our books and other physical items.
- Please help!



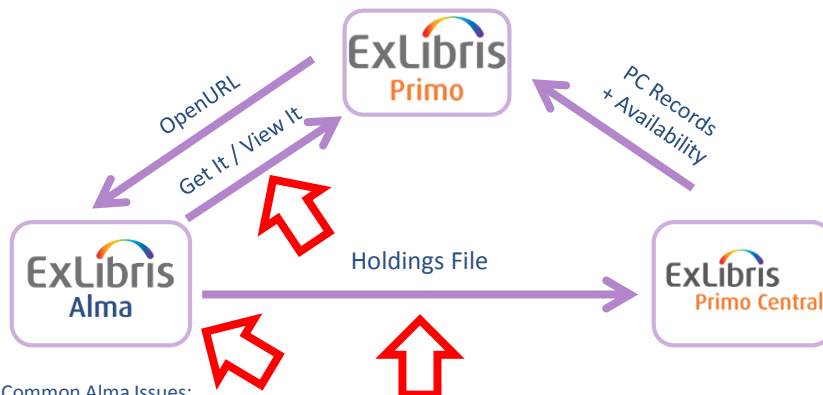
### The Diagnosis:

- Primo Central scope accidentally deactivated in Primo view!
- Only the library's bibliographic metadata from Alma is searchable.

### The Solution:

- Use Primo Back Office to activate the Primo Central scope in the Primo view.

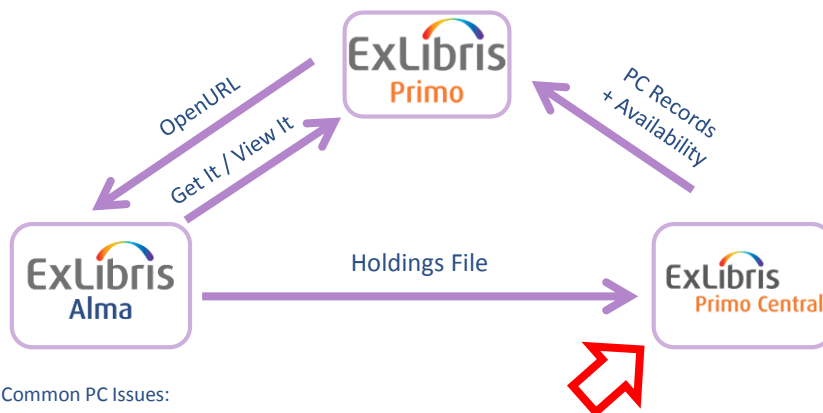
## What Could Go Wrong: Alma



Common Alma Issues:

1. Bad record (missing / wrong identifiers & date info)
2. Holding File publishing issue
3. No activation
4. No access

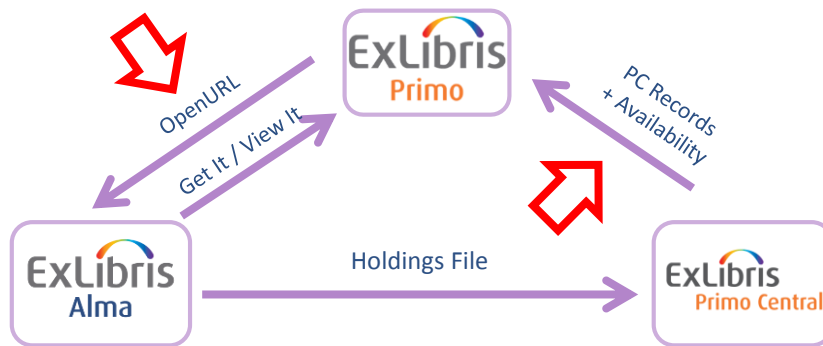
## What Could Go Wrong: Primo Central



Common PC Issues:

1. Bad record (missing / wrong identifiers & date info)
2. No collection activation
3. Linktorscr linking issue
4. Wrong Holdings File URL

## What Could Go Wrong: Primo Back Office




### Common Primo Issues:

1. No Primo Central in view
2. IP Traffic is not enabled
3. Wrong View It / Get It definitions
4. Wrong OpenURL definitions

## Primo Central PNX / Alma Context Objects



## Primo Central PNX- Addata



☆ **The significance of financial self-efficacy in explaining women's personal finance behaviour** [View all versions](#)

Farrell, Lisa ; Fry, Tim R.L. ; Risse, Leonora  
Journal of Economic Psychology, June 2016, Vol.54, pp.85-99 [Peer Reviewed Journal]  
's personal finance behaviour that is above-and-beyond... individuals' personal finance behaviour, there is... research in the field of personal finance

● **Full text available**

View It **Details** Get It [Citations](#) [Actions](#)

**Title:** The significance of financial self-efficacy in explaining women's personal finance behaviour

**Author:** Farrell, Lisa ; Fry, Tim R.L. ; Risse, Leonora

**Subjects:** Financial Self-Efficacy ; Personal Finance ; D03 ; D14 ; 2200

**Is Part Of:** Journal of Economic Psychology, June 2016, Vol.54, pp.85-99 [Peer Reviewed Journal]

**Description:** •Financial self-efficacy has an explanatory role in personal finance behaviour. •Higher financial self-efficacy is associated with investment and savings products. •Lower financial self-efficacy is associated with debt-related products. •Financial self-efficacy is independently identified from financial literacy factors. Much policy attention has been placed on enhancing individuals' financial knowledge and literacy, chiefly through financial education programs. However, managing one's personal finances takes more than


**Links**

> View record in ScienceDirect

## Primo Central PNX- Addata

← → ↻

← BACK TO RESULTS LIST



**ARTICLE**

**The significance of financial self-efficacy in explaining women's personal finance behaviour**


Farrell, Lisa ; Fry, Tim ; Risse, Leonora  
Journal of Economic Psychology, Jun 2016, Vol.54, p.85[Peer Reviewed Journal]

● **Full text available**

TOP

Send to \_\_\_\_\_

Related recomme to the rec



## Primo Central PNX- Adddata

```

<addata>
  <aulast>Farrell</aulast>
  <aulast>Fry</aulast>
  <aulast>Risse</aulast>
  <aufirst>Lisa</aufirst>
  <au>Farrell, Lisa</au>
  <au>Fry, Tim R.L.</au>
  <au>Risse, Leonora</au>
  <title>
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  </title>
  <jtitle>Journal of Economic Psychology</jtitle>
  <date>201606</date>
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  <volume>54</volume>
  <page>85</page>
  <epage>99</epage>
  <pages>85-99</pages>
  <issn>0167-4870</issn>
  <format>journal</format>
  <genre>article</genre>
  <ristype>JOUR</ristype>
  <abstract>...</abstract>
  <pub>Elsevier B.V.</pub>
  </addata>
  <title>
    The significance of financial self-efficacy in explaining women's personal finance behaviour
  </title>

```

Identifier: **<issn>0167-4870</issn>**

OR

Authors: **<au>Farrell, Lisa</au>**, **<au>Fry, Tim R.L.</au>**, **<au>Risse, Leonora</au>**

Genre: **<genre>article</genre>**

Title: **The significance of financial self-efficacy in explaining women's personal finance behaviour**

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## Alma Context Object

Article: **The significance of financial self-efficacy in explaining women's personal finance behaviour**

Farrell, Lisa ; Fry, Tim R.L. ; Risse, Leonora  
Journal of Economic Psychology, June 2016, Vol. 54, pp.85-99 [Peer Reviewed Journal]  
The significance of financial self-efficacy in explaining women's personal finance behaviour that is above-and-beyond... individuals' personal finance behaviour, there is... research in the field of personal finance

Full text available

**View It** Details Get It

Open source in a new window

3 Full text: Elsevier SD Freedom Collection

Additional services

RS request  
This is a public note

Document delivery  
Union Catalogue of Belgian Libraries  
ILL Articles  
Illiad test  
Test for RWIT  
this is a note

Click on the View It tab and then Open Source in a new window. The OpenURL will appear in the browser window. Scroll to the end of the URL and change the last parameter from = viewit to =CTO (all caps).

The context object window will open.

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## Alma Context Object

View It

To place a hold: [Sign in](#)

Full text available at: [Elsevier ScienceDirect Journals Complete](#)

Available from 03/01/1995 volume: 16 issue: 1

Additional services

[Need Research Help?](#)

[Report a Problem](#)

```

<key id="rft.oclcnum">38992899</key>
<key id="rft.issn">0167-4870</key>

<key id="rft.au">Farrell, Lisa</key>
<key id="rft.au">Fry, Tim RL</key>
<key id="rft.au">Risse, Leonora</key>

<key id="available_services">viewit</key>
<key id="available_services">getit</key>
<key id="rft.genre">article</key>

<key id="rft.atitle">
  The significance of financial self-efficacy in explaining women's personal finance behaviour
</key>

```

In the new UI right click on the View It area and then select Inspect. Find the element for the ViewIt section with "src=" and double click to select and copy the OpenURL. In a new tab paste the URL and change

**svc\_dat=viewit to =CTO**

## Alma Context Object

Identifier

```

<key id="rft.oclcnum">38992899</key>
<key id="rft.issn">0167-4870</key>

```

Authors

```

<key id="rft.au">Farrell, Lisa</key>
<key id="rft.au">Fry, Tim RL</key>
<key id="rft.au">Risse, Leonora</key>

```

Genre

```

<key id="available_services">viewit</key>
<key id="available_services">getit</key>
<key id="rft.genre">article</key>

```

Title

```

<key id="rft.atitle">
  The significance of financial self-efficacy in explaining women's personal finance behaviour
</key>

```

## Primo Central PNX / Alma Context Object

PNX Addata	Alma Context Object
<code>&lt;issn&gt;0167-4870&lt;/issn&gt;</code>	<code>rft.issn"&gt;0167-4870</code>
<code>&lt;au&gt;Farrell, Lisa&lt;/au&gt;</code> <code>&lt;au&gt;Fry, Tim R.L.&lt;/au&gt;</code> <code>&lt;au&gt;Risse, Leonora&lt;/au&gt;</code>	<code>rft.au"&gt;Farrell, Lisa&lt;/key&gt;</code> <code>rft.au"&gt;Fry, Tim RL&lt;/key&gt;</code> <code>rft.au"&gt;Risse, Leonora&lt;/key&gt;</code>
<code>&lt;genre&gt;article&lt;/genre&gt;</code>	<code>rft.genre"&gt;article&lt;/key&gt;</code>
<code>&lt;title&gt;</code> The significance of financial self-efficacy in explaining women's personal finance behaviour <code>&lt;/title&gt;</code>	
<code>&lt;key id="rft.atitle"&gt;</code> The significance of financial self-efficacy in explaining women's personal finance behaviour <code>&lt;/key&gt;</code>	

## Summary & Resources



## Session Summary

### During this training session we discussed:

- The role that Alma, Primo Central and Primo play in managing Electronic Resources.
- Matching points between Alma & Primo Central in the delivery of electronic resources to end-users.
- Troubleshooting Workflows and some real life examples
- The role of fixed availability resources
- How to view PNX metadata for PC resources
- How to view Content Object metadata for Alma records.

### Next Steps and Support Resources



## Next Steps and Support Resources

- Include documentation links relative to the topic:
  - Article 1
  - Article 2
  - Article 3
- Additional support resources within the ExLibris Ecosystem:
  - [Idea Exchange](#)
  - System Status Pages: [Single Tenant ENV](#) / [Multi-Tenant ENV](#)
  - [Developer Network](#)
- [Technical Seminar Presentations](#)  
(located in the Cross-Product section of the CKC)

## Q & A

**Any Questions?**





## Session Survey Evaluation

Please use the following link  
<https://www.surveymonkey.com/r/techsem2017> to provide feedback on your sessions.

