Troubleshooting E-Resources

ExLibris
a ProQuest Company

Agenda

- ***1 Managing E-resources***

- 2 Primo Central Index

- 3 Availability

- 4 Delivery

- 5 Linking

- 6 Summary & Resources

Electronic Resources

The library's electronic resources are managed in:

Discovery & delivery platform

Catalog
Subscription management
Link resolver

Online index of ~1,000,000,000 records

Search Process: Components & Flow
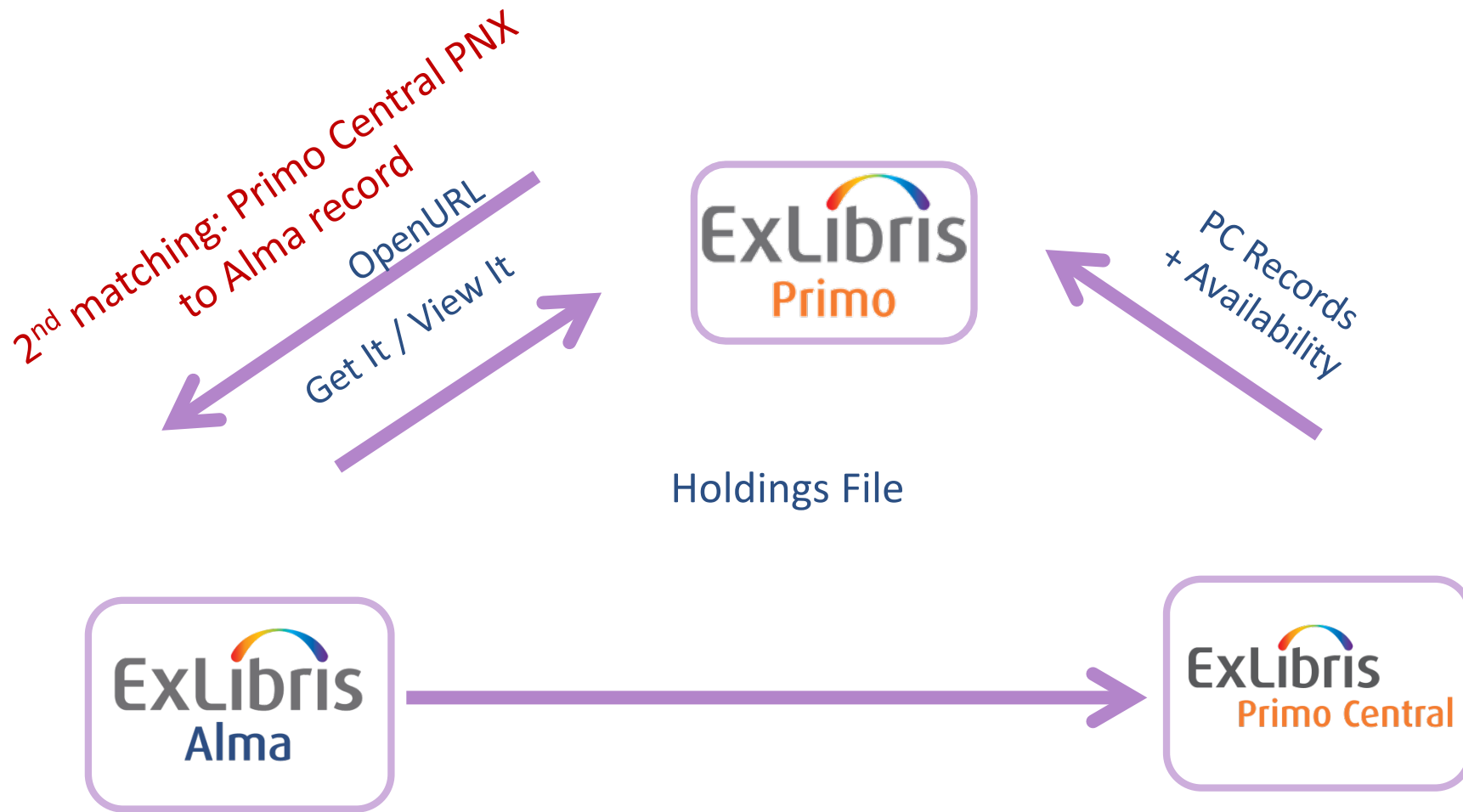

Holdings File

1st matching: Alma Holdings File to Primo Central records

1. Activate resource collections in Primo Central (at implementation)

2. Maintain catalog and inventory in Alma (around the clock)

3. Holdings File publishing, harvesting & availability processing (weekly)
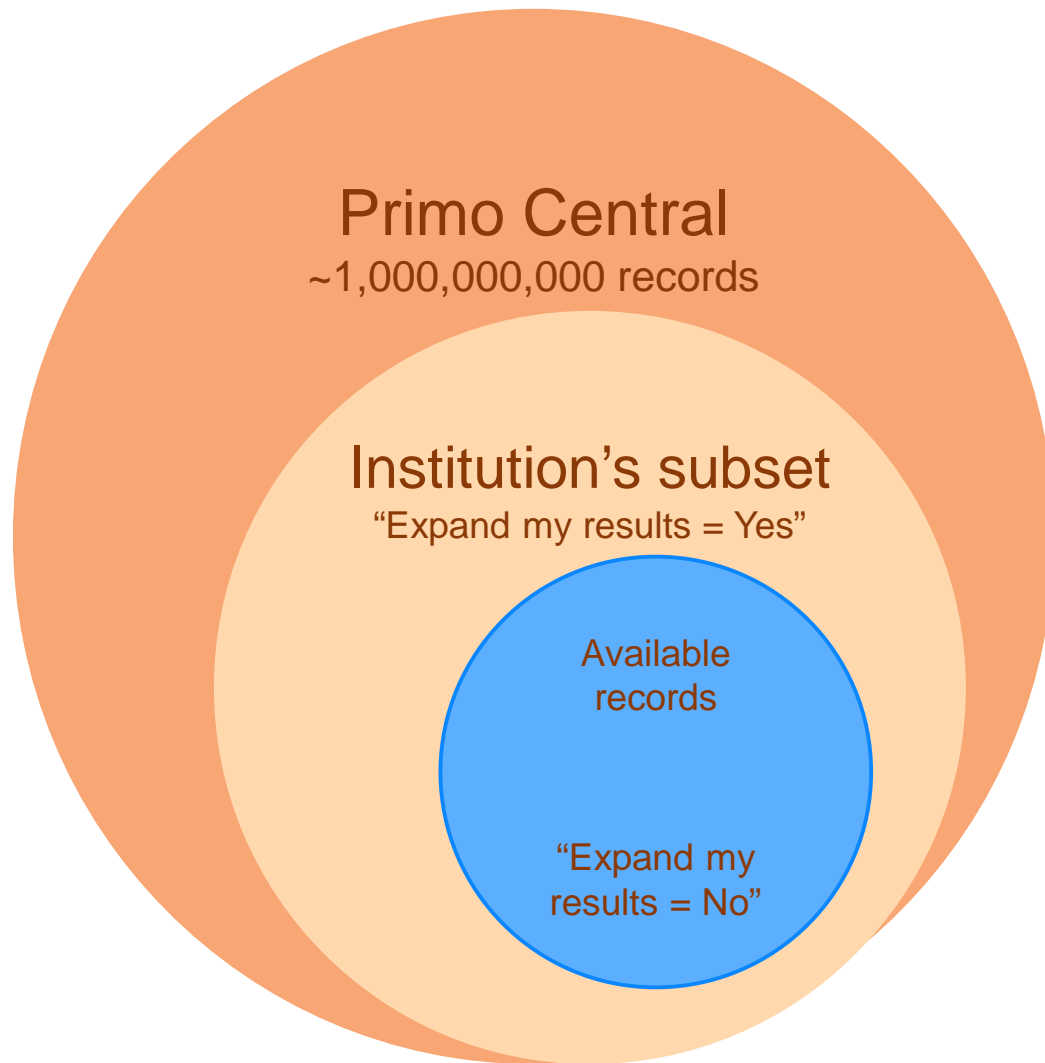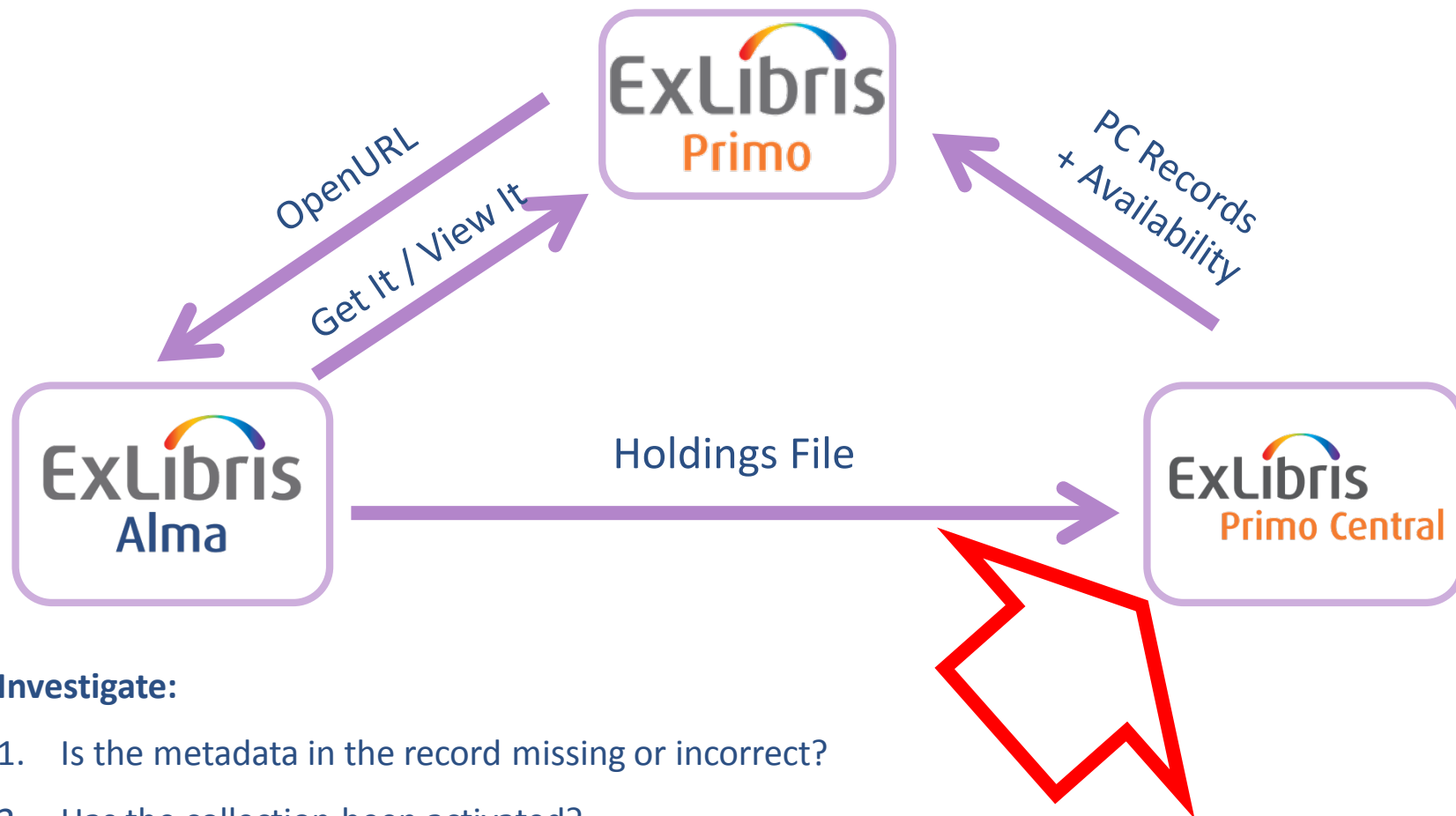
Search Process: Components & Flow

2nd matching: Primo Central PNX to Alma record

OpenURL

Get It / View It

PC Records + Availability

Holdings File

Primo

Alma

Primo Central

Agenda

- 1 Managing E-resources
- **_2 Primo Central Index_**
- 3 Availability
- 4 Delivery
- 5 Linking
- 6 Summary & Resources

ExLibris

Primo Central

Primo Central
~1,000,000,000 records

Institution's subset
"Expand my results = Yes"

Available records
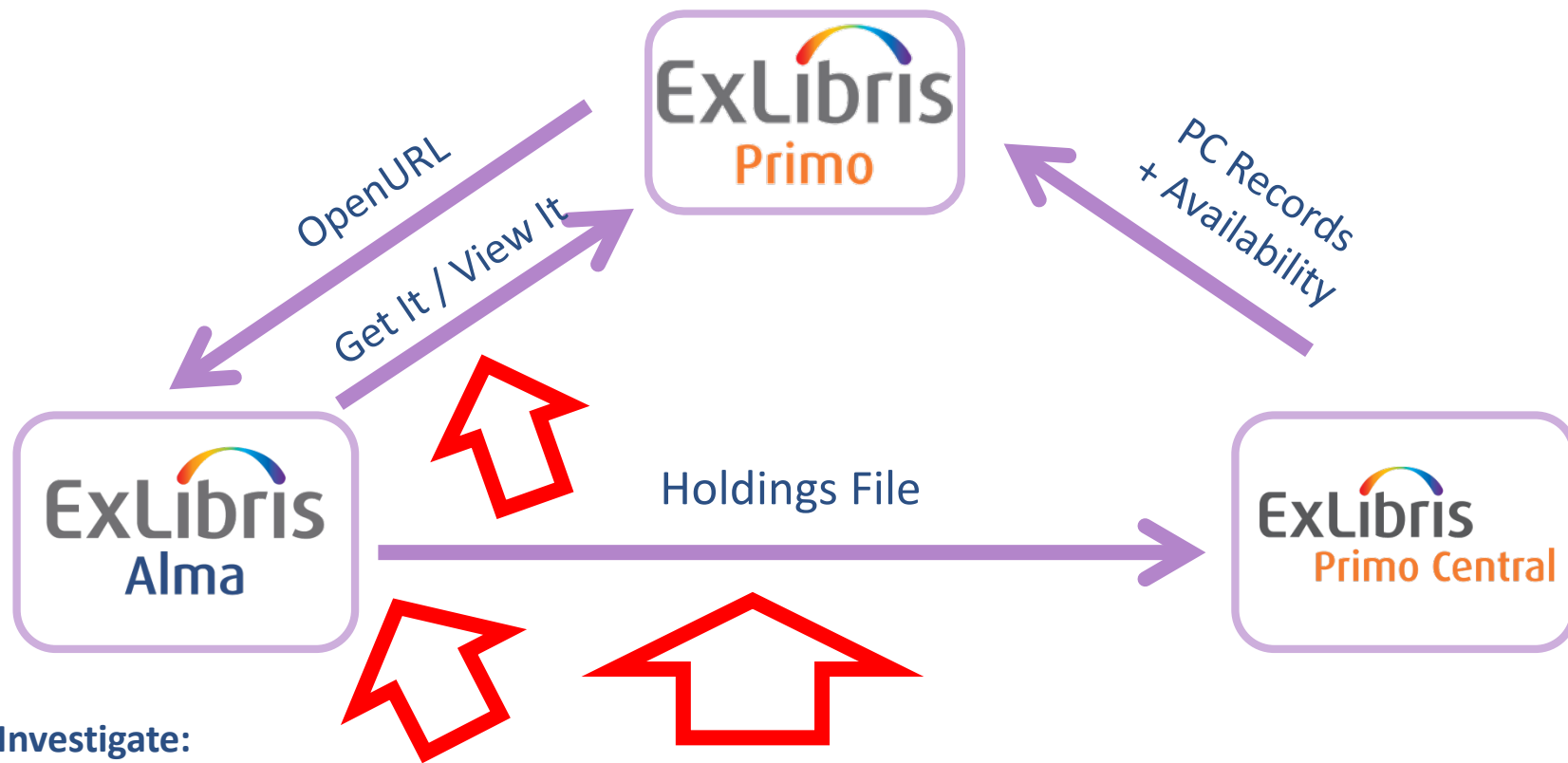
"Expand my results = No"

ExLibris

What Could Go Wrong: Primo Central

Investigate:

1. Is the metadata in the record missing or incorrect?

2. Has the collection been activated?

3. Are the Lintorscr details accurate?

4. Is the URL for the holdings file correct?

What Could Go Wrong: Alma

OpenURL

Get It / View It

PC Records + Availability

Holdings File

Investigate:

1. Is the metadata in the record missing or incorrect?

2. Has the Holdings file failed to publish? Is it current?

3. Have collections, portfolios or services been activated/tested?
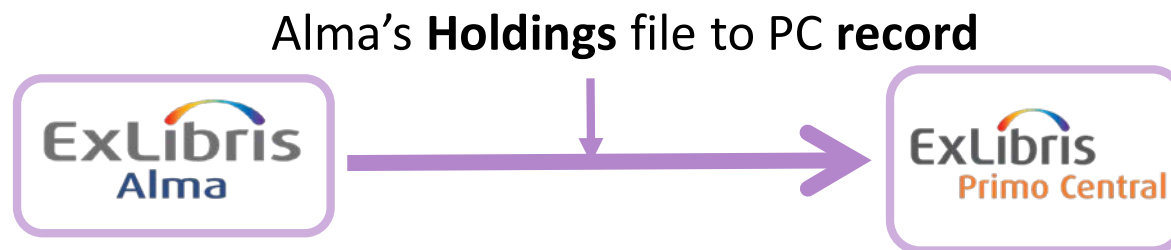
4. Are the linking parameters correct?

What Could Go Wrong: Primo
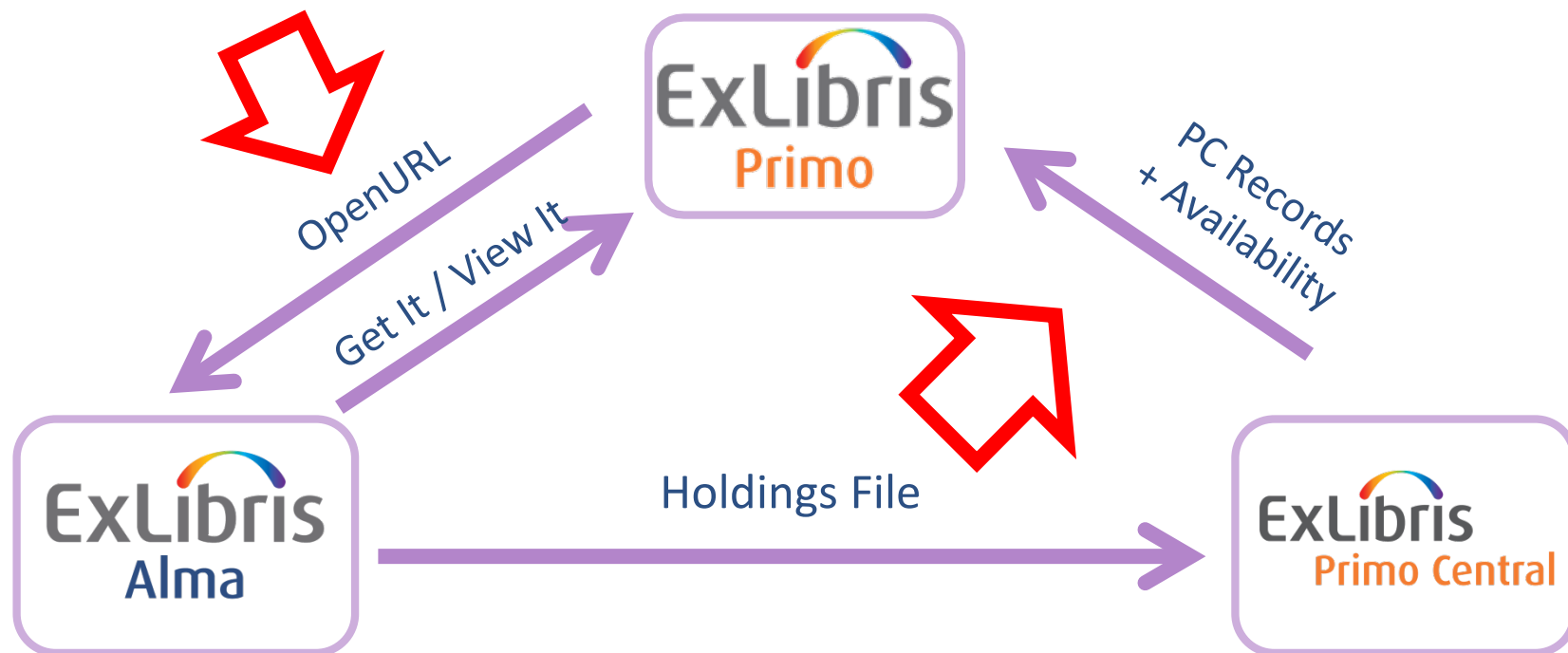
Investigate:

1. Is the Primo Scope active?

2. Are the View It / Get It definitions correct?

3. Are the OpenURL definitions correct?

Matching Mismatches: FIRST Matching

Alma's **Holdings** file to PC **record**

-**Identifier**: ISBN, EISBN, ISSN, EISSN

OR

-**Title** (if identifier didn't match):
Titles undergo Normalization (for titles which are not common)

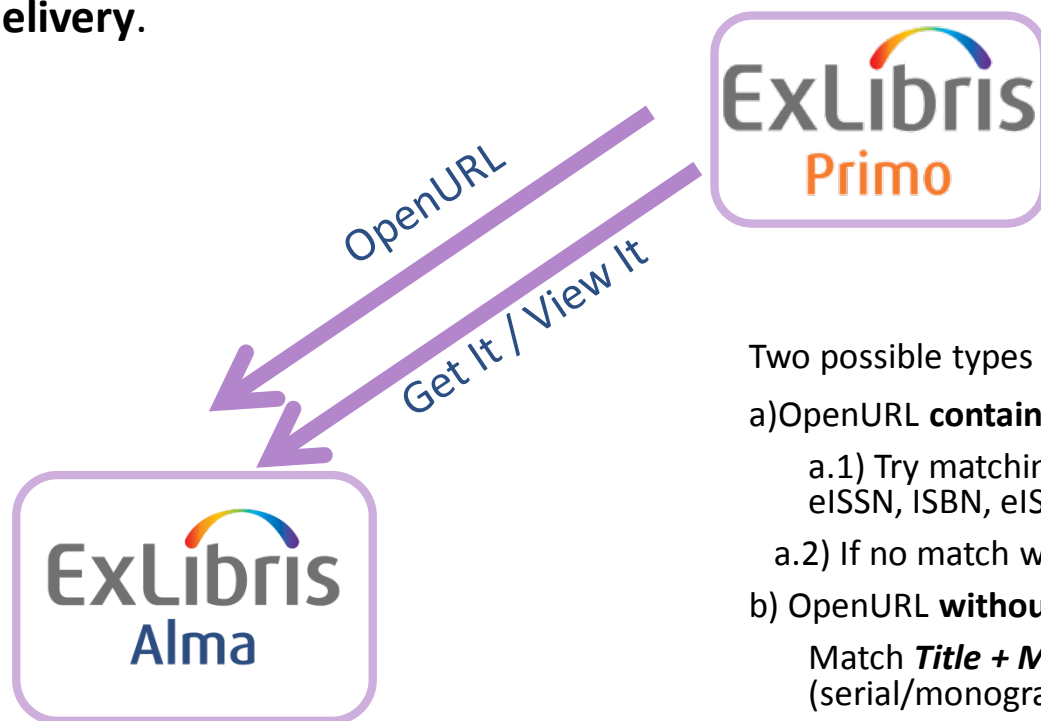-*(Identifier OR Title) AND Coverage*

AND

-Coverage: Threshold, Embargo, year information

    The holdings file may contain more than one coverage.

    One is enough to declare a match

Matching Mismatches: SECOND Matching

OpenURL (from PC **PNX)** 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 + Material Type* (to PC *Genre*) (serial/monograph)

* Title matching is an EXACT match, on the "extended title" index: matching on 245$$a and/or on the combination 245$$a,b,k,n,p)
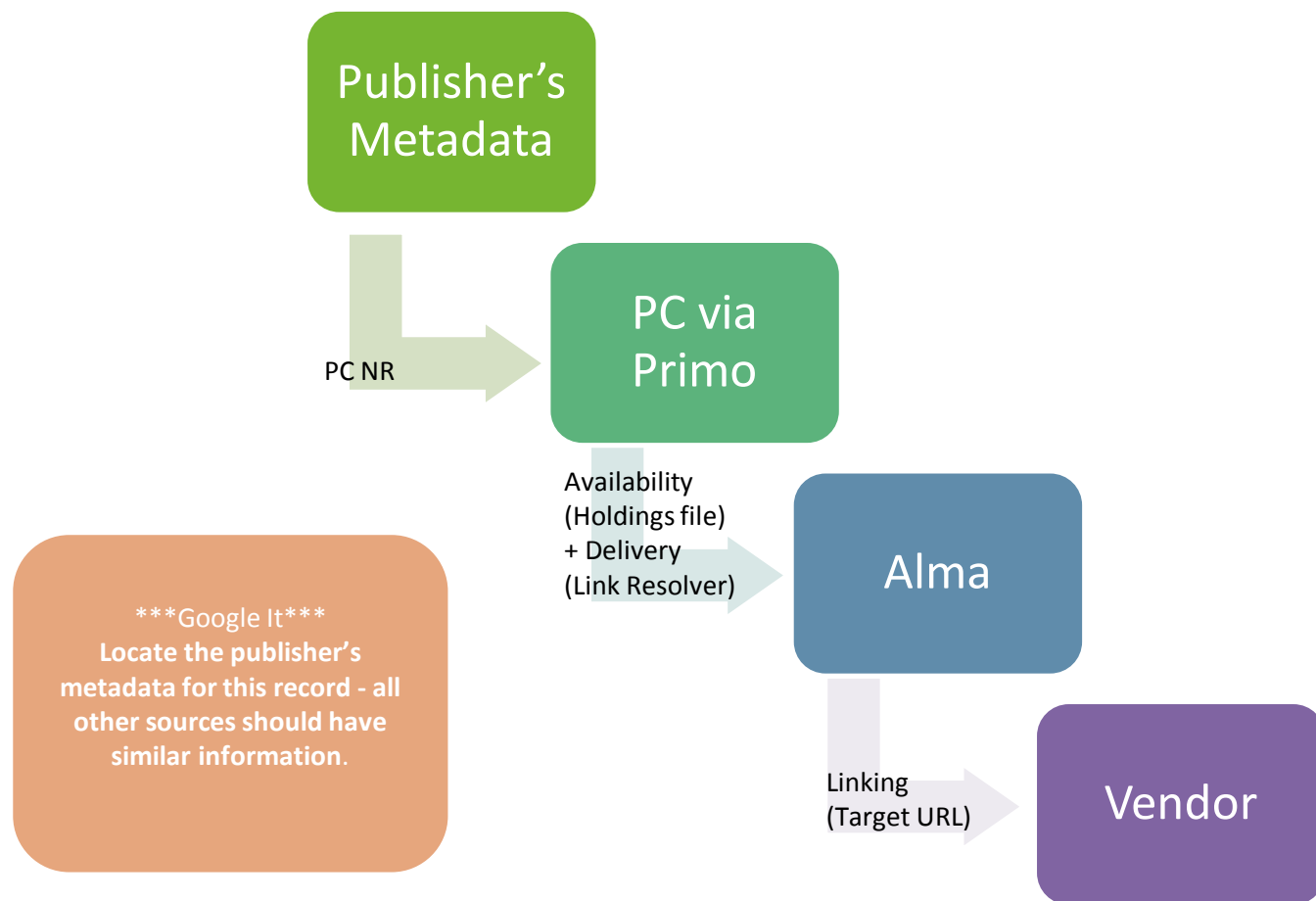
PC PNX → OpenURL → Alma

OpenURL

https://na01.alma.exlibrisgroup.com/view/uresolver/TR_INTEGRATION_INST/openurl?ctx_enc=info:ofi/enc:UTF-8&ctx_id=10_1&ctx_tim=2014-12-11T05%3A53%3A41IST&ctx_ver=Z39.88-2004&url_ctx_fmt=info:ofi/fmt:kev:mtx:ctx&url_ver=Z39.88-2004&rfr_id=info:sid/primo.exlibrisgroup.com-medline&req_id=&rft_val_fmt=info:ofi/fmt:kev:mtx:journal&rft.genre=article&rft.atitle=Is%20there%20any%20electrophysiological%20evidence%20for%20subliminal%20error%20processing%3F&rft.jtitle=Frontiers%20in%20neuroscience&rft.au=Shalgi%2C%20Shani&rft.date=2013&rft.volume=7&rft.issue=&rft.part=&rft.quarter=&rft.ssn=&rft.spage=150&rft.epage=&rft.pages=150&rft.artnum=&rft.issn=16624548&rft_id=info:doi/10.3389/fnins.2013.00150&rft_id=info:bibcode/&rft_id=info:hdl/&rft_id=info:lccn/&rft_id=info:oclcnum/&rft_id=info:pmid/24009548&rft_id=info:eric/%28%28addata/eric}}&rft_dat=%3Cmedline%3E24009548%3C/medline%3E,language=eng,view=ALMACLOUD&svc_dat=viewit

- Article information (name, author, identifiers)
- Journal information (name, identifiers)

Identify the Problem: Flow

Publisher's Metadata

PC NR →

PC via Primo

Availability (Holdings file) + Delivery (Link Resolver) →

Alma

Linking (Target URL) →

Vendor

Google It
Locate the publisher's metadata for this record - all other sources should have similar information.

- Where is the discrepancy?
- Where is the wrong metadata (record source? PC Normalization? Alma record?)

ExLibris

Identify the Problem: Where?

What's missing?

- The PC record from the search → Shows in "Expand my results"?
  - NO → PCI Results TS
  - YES → Availability TS
- There is no View It tab at all → Is the availability indication right?
  - NO → Availability TS
  - YES → Check Primo BO configuration
- All links in existing View It → Suspect matching issue!
  - False availability? → Availability TS
  - All links Missing/wrong → Delivery TS
- Some links in View It missing / resolve to the wrong place → Suspect Alma → Linking Issues TS

Troubleshooting Tip: It's a PC case

A record displayed in Primo contains different metadata than publisher (as a result of bad source / Primo Central Normalization Rule)

To analyse:
1. Compare the publisher information with the PNX (ISSN/ISBN, title, date).
2. Compare the source record with the PNX and find out if the discrepancy originated from the source.

Example of Wrong Metadata from Vendor

Article NOT published in the journal "*Georgetown Journal of Gender and the Law*" published in "*Georgetown Journal on Poverty Law & Policy*".

PCI citation
Author: Flocks, Joan D.
Article Title: The environmental and social injustice of farmworker pesticide exposure.
Journal Title: Georgetown Journal of Gender and the Law
Volume: 13, Issue No: 2
Date: Spring 2012
Pages: 255-282

Correct Citation:
Author: Flocks, Joan D.
Article Title: The environmental and social injustice of farmworker pesticide exposure.
Journal Title: Georgetown Journal on Poverty Law & Policy
Volume: 19, Issue: 2
Date: Spring 2012
Pages: 255-

ExLibris

Agenda

- 1 Managing E-resources
- 2 Primo Central Index
- ***3 Availability***
- 4 Delivery
- 5 Linking
- 6 Summary & Resources

Troubleshooting tip: Availability

The Metadata in the openURL matches the
publisher's, and there's still a linking issue.

To analyse:
1.   Check Fulltext Availability indicator - is it Green?

If not → troubleshoot Availability

Availability in Primo – No Full Text

Example

Article
Multi-scale modeling of the North Pacific Ocean: Assessment and analysis of simulated basin-scale variability (1996–2003)
DOI: 10.1029/2004JC002436

The article is in: Alma
Journal of Geophysical Research (title appears in Primo as part of the Wiley online library collection) and in Primo Central the Wiley Online Library - Journals collection has been activated.

But it only appears in Primo when you expand your search and then it says 'No full-text'

We have checked the issue and were able to reproduce it. We found that the article with record ID TN_wj10.1029/2005JC002902 in the journal "Journal of Geophysical Research: Oceans" is not available in the holdings file that is provided by Alma. Please check your Alma collections and change the activations if required. In case changes have to be made please wait for the weekly update cycle of Primo Central to run.

ExLibris

Agenda

- 1 Managing E-resources
- 2 Primo Central Index
- 3 Availability
- *4 Delivery*
- 5 Linking
- 6 Summary & Resources

Troubleshooting Tip: Delivery Case

To analyse:

1. Check if Primo generates Get It with green availability (or View Online) tab . If it is GREEN, then

   If yes → troubleshoot Delivery

ExLibris

Example- Troubleshoot Delivery

The following article is displaying a green dot in Primo, but we have no full text:
Author(s): Ronald Podeschi
Article Title: Andragogy: Proof or Premises
Journal Title: Lifelong Learning
Volume Number: 11
Issue Number: 3
Publication Year: 1987
Page Numbers: 14-16

This is an ERIC citation coming from Primo Central Index. We have no collections or portfolios in Alma for this journal, so it should show a grey dot

Solution: I would like to update you that we have enriched the data with ISSN, and loaded the record into PCI. (Remember that the holdings file matches on Identifier or normalized title- in this case the title was no distinct enough to validate FT or no FT.

Troubleshooting Tip: Delivery Case

To analyse:

1. Check that PNX data matches Alma's ViewIt xml (svc_dat=CTO).

If not → troubleshoot Delivery

ExLibris

Troubleshooting Tip: Delivery Case

1. Open View it in a new window and copy URL from browser
2. http://na03.alma.exlibrisgroup.com/view/uresolver/01IASU_INST/openurl?ctx_enc=info:ofi/enc:UTF-8&ctx_id=10_1&ctx_tim=2016-04-15T13%3A48%3A09IST&ctx_ver=Z39.88-2004&url_ctx_fmt=info:ofi/fmt:kev:mtx:ctx&url_ver=Z39.88-2004&rfr_id=info:sid/primo.exlibrisgroup.com-gale_hrca&req_id=&rft_val_fmt=info:ofi/fmt:kev:mtx:&rft.genre=article&rft.atitle=Baby%20You%27re%20a%20Rich%20Man,%20Too.&rft.jtitle=Newsweek&rft.btitle=&rft.aulast=&rft.auinit=&rft.auinit1=&rft.auinitm=&rft.ausuffix=&rft.au=McMillian,%20John&rft.aucorp=&rft.date=20131220&rft.volume=161&rft.issue=46&rft.part=&rft.quarter=&rft.ssn=&rft.spage=1&rft.epage=&rft.pages=&rft.artnum=&rft.issn=0028-9604&rft.eissn=&rft.isbn=&rft.sici=&rft.coden=&rft_id=info:doi/&rft.object_id=&rft.eisbn=&rft.edition=&rft.pub=Newsweek%20LLC&rft.place=&rft.series=&rft.stitle=&rft.bici=&rft_id=info:bibcode/&rft_id=info:hdl/&rft_id=info:lccn/&rft_id=info:oclcnum/&rft_id=info:pmid/&rft_id=info:eric/((addata/eric}}&rft_dat=%3Cgale_hrca%3E353550250%3C/gale_hrca%3E,language=eng,view=01IASU&svc_dat=~~viewit~~ CTO

ExLibris

Alma View (Partial) Context Object

```xml
        <gale_hrca>353550250</gale_hrca>,language=eng,view=01IASU
    </key>
    <key id="rft.title">Newsweek.</key>
    <key id="rft.lccn">35009615</key>
    <key id="rft.pub">Newsweek etc</key>
    <key id="ctx_tim">2016-04-15T13:48:09IST</key>
    <key id="ctx_ver">Z39.88-2004</key>
    <key id="licenseEnable">false</key>
    <key id="rft.jtitle">Newsweek.</key>
    <key id="sfx.sid">primo.exlibrisgroup.com-gale_hrca</key>
    <key id="sfx.primo_docTAG">gale_hrca</key>
    <key id="url_ctx_fmt">info:ofi/fmt:kev:mtx:ctx</key>
    <key id="rft.spage">1</key>
    <key id="rft.oclcnum">1760328</key>
    <key id="rft.issn">0028-9604</key>
    <key id="req.skin">01IASU</key>
    <key id="rft.mms_id">9920135159702756</key>
    <key id="rft.day">20</key>
    <key id="rft.month">12</key>
    <key id="rfr_id">info:sid/primo.exlibrisgroup.com-gale_hrca</key>
    <key id="req.language">eng</key>
    <key id="rft.publisher">Newsweek etc</key>
    <key id="rft.au">McMillian, John</key>
    <key id="rft.pubdate">Began with v. 1 (Feb. 17, 1933).</key>
    <key id="rft.atitle">Baby You're a Rich Man, Too.</key>
    <key id="customer">2755</key>
    <key id="rfr.rfr">primo.exlibrisgroup.com-gale_hrca</key>
</keys>
```

ExLibris

Addata Section of Primo Central PNX

Click details tab of article, open in a new window, add & showPnx=true in browser window.

```
▼<addata>
    <au>McMillian, John</au>
    <atitle>Baby You're a Rich Man, Too.</atitle>
    <jtitle>Newsweek</jtitle>
    <date>20131220</date>
    <risdate>20131220</risdate>
    <volume>161</volume>
    <issue>46</issue>
    <spage>1</spage>
    <issn>0028-9604</issn>
    <genre>article</genre>
    <ristype>JOUR</ristype>
    <pub>Newsweek LLC</pub>
    <lad01>gale_hrca</lad01>
</addata>
```

ExLibris

Agenda

- 1 Managing E-resources
- 2 Primo Central Index
- 3 Availability
- 4 Delivery
- **5 Linking**
- 6 Summary & Resources

ExLibris

Troubleshooting Tip: Linking

Links appear indicating access to full-text, however, the links are not working

→ Troubleshoot Linking

ExLibris

Example: Troubleshoot Linking

Problem: ProQuest article is missing

If you conduct an article (PC) search for: art design the top result on the list is Schellmann Art.(DESIGN) in Artforum International, 2015, Vol.53(8), P.142(1) and there are links showing for ProQuest Arts & Humanities Full text and ProQuest Central.

Follow either of these links you end up at: a broken link with a message saying that ISSN(1086-7058) AND VOL(53) AND ISS(8) AND PAGE(142) AND FTANY(YES) found 0 results.
[Customer]
I have tried searching on the native interface for 'Schellmann Art' and I get 0 results with makes me think the resource is not available and should be removed from Primo Central.

Solution:

The journal is available with full text, but seems to be missing this specific article. Unfortunately, since it's only a single article (as opposed to the whole issue or volume) its absence cannot be displayed.

ExLibris

Example: Troubleshoot Linking

Problem:

For article citations from (journal) Linguistic Inquiry (ISSN 0024-3892) openURL links from other sources resolve correctly but the MLA-source Primo Central links fail (with a "We're Sorry—We Couldn't Find the Page You're Looking For"

There are 3 links for full-text linking:

- *MLA (not working)*
- *ProQuest (working)*
- *JSTOR (working)*

Solution:

There is a wrong DOI number in MLA record and it causing a linking problem. DOI number 10.2307_4178598(wrong-I tried to search it on cross ref and didn't get any proper result, I also tried to look for the correct DOI for the article but couldn't find one)
There is two different records (ProQuest and Jstor) that works fine due to they don't use DOI.

Remove the DOI from the record. (Digital Object Identifier)

ExLibris

Linking Issues Examples

Examples:

Problem:

Hunger games.(smartphone apps affect health of users)
Gregory, Alice
The New Republic, Dec 30, 2013, Vol.245(1), p.7(3)
full text available from four EBSCOHOST collections and Lexis-Nexis. None connect.
Error on all five links.

Went to a native source - found the article full text - has a different version of title.

Troubleshooting

The record links correctly for Lexis-Nexis but all 4 EBSCO targets fail. The metadata looks correct and all articles were available from EBSCO search

Solution:
The parser parameters have been updated, the link now leads to the correct article.
Change is part of Alma CKB update, this update will apply to CZ parser parameters-localization is possible also.

Agenda

- 1 Managing E-resources
- 2 Primo Central Index
- 3 Availability
- 4 Delivery
- 5 Linking
- **_6 Summary & Resources_**

ExLibris

Delivery Troubleshooting: What Is It?

The Delivery process

For each search result, Primo:

1. Shows the 'availability status' (for PC records, the availability is received from PC) and retrieves the 'item type'.

2. Constructs the 'viewit1' tab:

-   Selecting process according to item type & availability.

-   Selecting template (direct link, openURL, etc.) according to PNX links/<template name>
    Alma then provides Link Resolving services according to inventory & access.

ExLibris

Electronic Resources- Flow

OpenURL

Get It / View It

PC Records
+ Availability

Holdings File
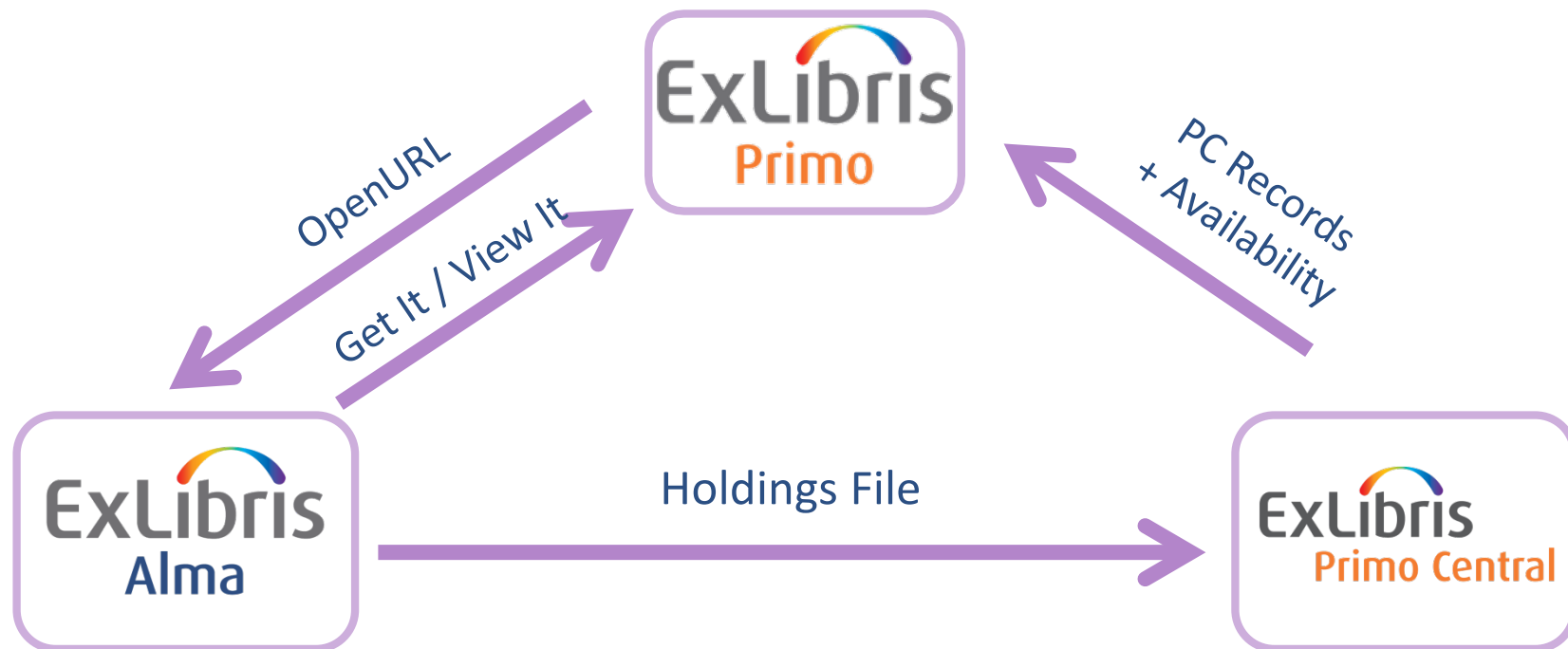
Delivery Trouble Shooting: Primo FE

1. Log into Primo (always! Unless debugging a "guest" issue…)

2. Is the record defined as linktorscr? (PC Support)

3. PNX "addata": Verify identifiers and date information

4. PNX <delcategory> field: Verify Data is included ("item type")

5. Inspect OpenURL: is all necessary information included?

6. ViewIt xml:

    - context_object: Is Alma resolving for the right resource?

    - context_services: Check services for availability & filtering

ExLibris

Delivery Trouble Shooting: Inside Alma

1. Check activation in Alma

2. Check Augmentation profile in Alma (DOI, OAI & pubmed records)

3. Check suppression

Linking (Targets) Trouble Shooting

My link goes to the wrong place!

1. Log into Primo (always! Unless debugging a "guest" issue...)

2. Check record source (PC? Alma? Linktorscr?)

3. Check Coverage

4. Check Logic Display rules

5. Is your record Local or CZ?

ExLibris

CZ Linking Trouble Shooting

1. Recreated in support's environment?

2. Local parameters needed?

3. Title & identifiers exist and correct?

4. Is the problem in the CZ Bib / portfolio / collection?

5. Check the OpenURL

6. Check the Target URL

→ Forward the case to Alma Data Services

ExLibris

Local Linking Trouble Shooting

1. Title & identifiers exist and correct?

2. Check linking parameters

3. Check the Target URL

→ Forward the case to Alma Support

ExLibris

Summary

Identify the type & scope of the problem

Debug accordingly using suggested areas

Open case as needed:

- Primo Central: bad PC record, problem with PC matching

- Alma: problem with HF publishing, Link Resolver issues, linking issues, access issues

- Alma Data Services: bad CZ record, bad CZ linking

ExLibris

Thank you!

http://knowledge.exlibrisgroup.com

ExLibris
a ProQuest Company