



# Fine-tuning Resource Sharing Requesting from the Primo Link Resolver Record

December 11, 2019

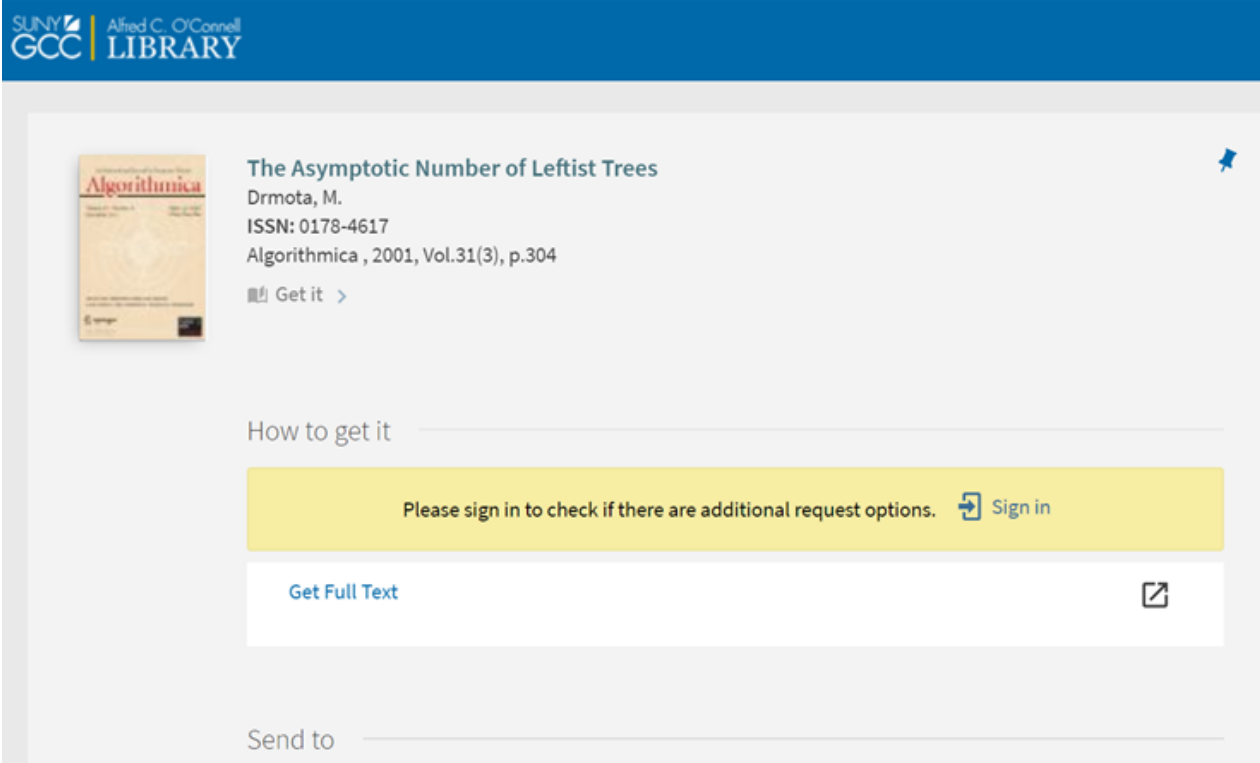
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Michelle Eichelberger

[www.suny.edu](http://www.suny.edu)



# What's the Link Resolver Record?

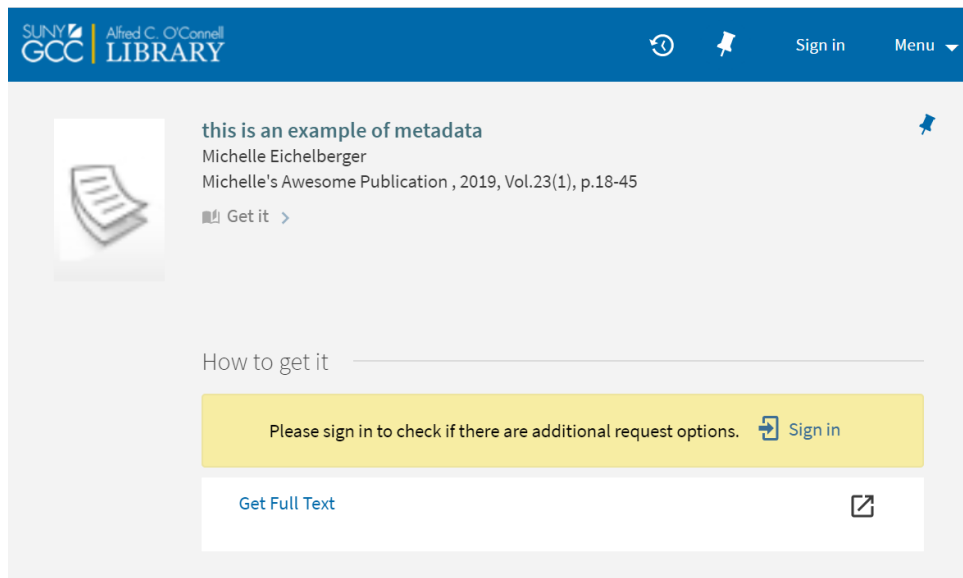
- The link resolver pulls all your holdings information together and identifies which, if any, of your databases provide full-text for your search result.
- Creates record that pulls in electronic & print holdings from Alma, applies GES for requesting based on how you've set it up, and how the metadata came in via OpenURL from database, Google Scholar, etc.



The screenshot shows a library record page from SUNY GCC Alfred C. O'Connell LIBRARY. The record is for the article "The Asymptotic Number of Leftist Trees" by Drmota, M., published in *Algorithmica*, 2001, Vol.31(3), p.304. The ISSN is 0178-4617. A small thumbnail of the journal cover is visible on the left. Below the title and author information, there is a "Get it" link. A yellow banner prompts the user to "Please sign in to check if there are additional request options." with a "Sign in" button. Below this, there is a "Get Full Text" button with an external link icon. At the bottom, there is a "Send to" field.

# How can you see the metadata on the Link Resolver Record?

To see how the Link Resolver Record works, you can create a Citation Request using Fetch Item (Citation Linker) (Thanks Jill Locascio!)



The screenshot shows a library record page from SUNY GCC Alfred C. O'Connell LIBRARY. The record title is "this is an example of metadata" by Michelle Eichelberger. The citation information is "Michelle's Awesome Publication , 2019, Vol.23(1), p.18-45". There is a "Get it" button and a "How to get it" section with a "Get Full Text" button. A red arrow points from the "Get Full Text" button to the "Fetch item" form on the right.

### Fetch item (Citation Linker)

Find a specific journal article, journal or book by citation information.  
For best results, include a title, ISSN, ISBN, DOI or PMID.

Article  Book  Journal

Article Title	this is an example of metac		Journal Title	Michelle's Awesome Public	
Year	Month	Day	Volume	Issue	
2019	03	03	23	1	
Start Page	End Page		ISSN		
18	45		DOI		
Author Last Name		Author First Name		PMID	
Eichelberger		Michelle			

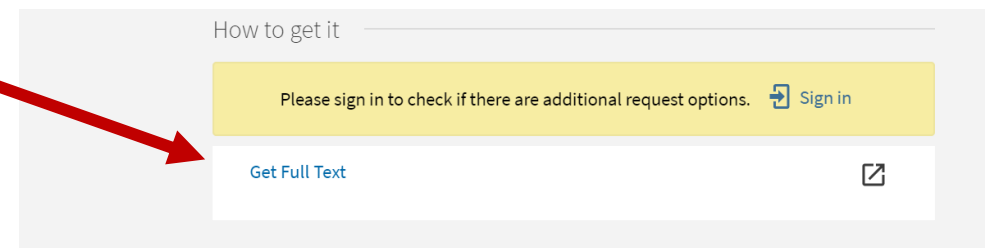
# How can you see the metadata on the Link Resolver Record?

To see what metadata came in via OpenURL from outside source, add `&displayCTO=true` to end of URL and hit enter



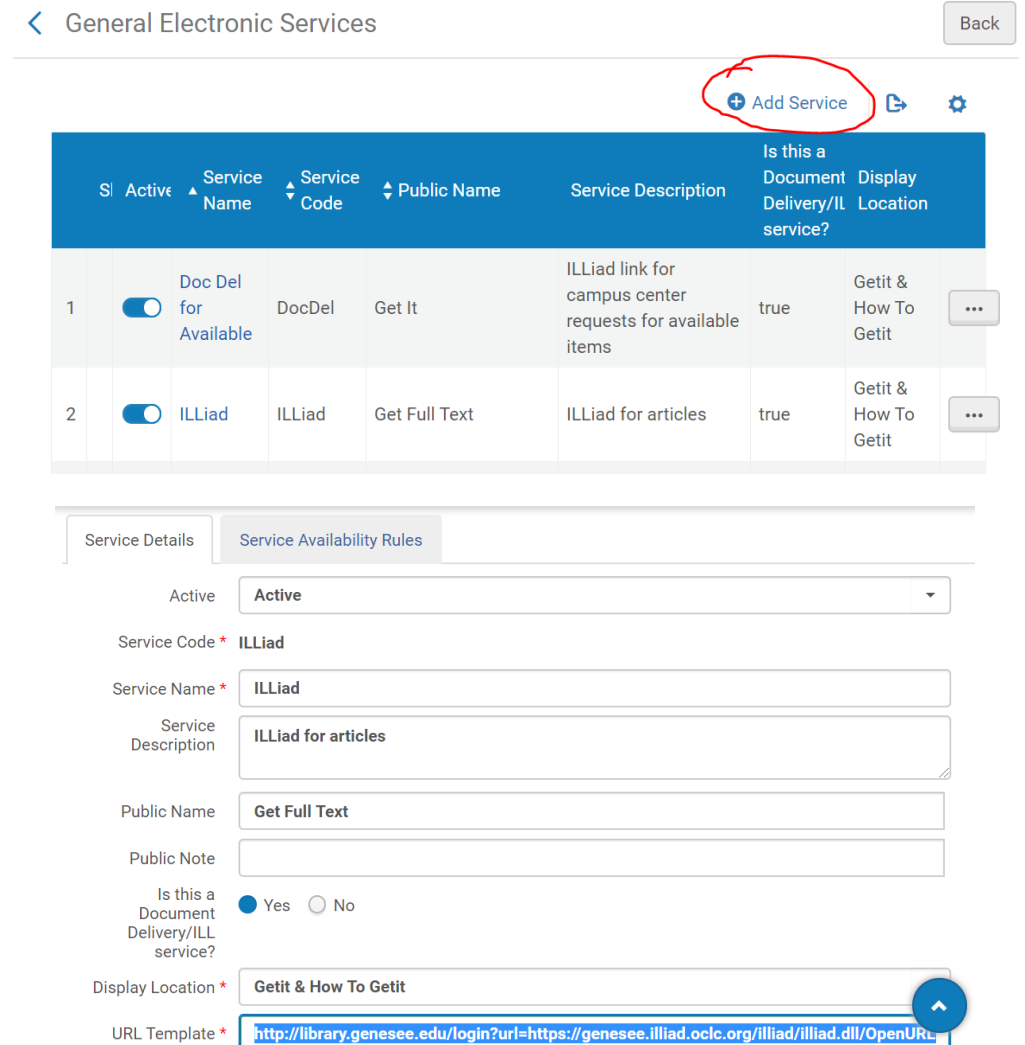
```
<u:resolver_content xmlns:u="http://com.exlibris/urm/uresolver/xmlbeans/u">
  <u:context_object>
    <u:keys>
      <u:key id="ctx_enc">info:ofi/enc:UTF-8</u:key>
      <u:key id="rft_val_fmt">info:ofi/fmt:kev:mtx:article</u:key>
      <u:key id="rft.epage">45</u:key>
      <u:key id="rft.volume">23</u:key>
      <u:key id="ctx_ver">Z39.88-2004</u:key>
      <u:key id="licenseEnable">>false</u:key>
      <u:key id="memberProxyServer">http://library.genesee.edu/login?=</u:key>
      <u:key id="rft.jtitle">Michelle's Awesome Publication</u:key>
      <u:key id="sfx.sid">primo.exlibrisgroup.com:primo4-article-cLinker</u:key>
      <u:key id="memberProxyIp">put IP here</u:key>
      <u:key id="svc.profile">viewit</u:key>
      <u:key id="rft.genre">article</u:key>
      <u:key id="rft.aufirst">Michelle</u:key>
      <u:key id="memberUseProxy">Selective</u:key>
      <u:key id="url_ctx_fmt">info:ofi/fmt:kev:mtx:ctx</u:key>
      <u:key id="vid">01SUNY_GCC:01SUNY_GCC</u:key>
      <u:key id="institution">4832</u:key>
      <u:key id="isCitationLinker">Y</u:key>
      <u:key xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" id="memberProxyType" xsi:nil="true"/>
      <u:key id="rft.spage">18</u:key>
      <u:key id="rft.year">2019</u:key>
      <u:key xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" id="req.id" xsi:nil="true"/>
      <u:key id="rft.day">03</u:key>
      <u:key id="rft.month">03</u:key>
      <u:key id="rft.orig_genre">article</u:key>
    </u:keys>
  </u:context_object>
  <u:key id="rfr_id">
    info:sid/primo.exlibrisgroup.com:primo4-article-cLinker
  </u:key>
  <u:key id="rft.issue">1</u:key>
  <u:key id="rft.aulast">Eichelberger</u:key>
  <u:key id="url_ver">Z39.88-2004</u:key>
  <u:key id="rft.date">2019-03-03</u:key>
  <u:key id="memberProxyType">EZProxy</u:key>
</u:resolver_content>
```

rft.genre can explain why your ILLiad GES is showing or not showing, because you use Service Availability Rules to display it based on genre







# Quick General Electronic Service Review

- Under Config->Fulfillment->Discovery Interface Display Logic
- Can create as many as you'd like
- Use Service Availability Rules to tell it when to display
- Pro Tips:
  - If link is showing up twice on your records, make that Display Location is only Getit & How to Getit, not View It
  - Make sure Item Level = No



General Electronic Services Back

[+ Add Service](#)  

Sl	Active	Service Name	Service Code	Public Name	Service Description	Is this a Document Delivery/ILL service?	Display Location	
1	<input checked="" type="checkbox"/>	Doc Del for Available	DocDel	Get It	ILLiad link for campus center requests for available items	true	Getit & How To Getit	
2	<input checked="" type="checkbox"/>	ILLiad	ILLiad	Get Full Text	ILLiad for articles	true	Getit & How To Getit	

Service Details **Service Availability Rules**

Active:

Service Code \*

Service Name \*

Service Description:

Public Name:

Public Note:

Is this a Document Delivery/ILL service?  Yes  No

Display Location \*

URL Template \*

# Quick General Electronic Service Review

- Out of the box ILLiad URL looks like:

`http://library.genesee.edu/login?url=https://genesee.illiad.oclc.org/illiad/illiad.dll/OpenURL?&rfe_dat={rft.oclcnum}&rft.issn={rft.issn}&rft.isbn={rft.isbn}&rft.volume={rft.volume}&rft.pages={rft.pages}&rft.month={rft.month}&rft.genre={rft.genre}&rft.auinit={rft.auinit}&rft.pub={rft.pub}&rft.issue={rft.issue}&rft.place={rft.place}&rft.title={rft.title}&rft.stitle={rft.stitle}&rft.btitle={rft.btitle}&rft.jtitle={rft.jtitle}&rft.au={rft.au}&rft.aufirst={rft.aufirst}&linktype=openurl&rft.atitle={rft.atitle}&rft_val_fmt=info%3Aofi%2Ffmt%3Akev%3Amtx%3Aarticle&rft.auinit1={rft.auinit1}&rft.date={rft.date}&rft.year={rft.year}&url_ver=Z39.88-2004&rft.aulast={rft.aulast}&rft.spage={rft.spage}&rfr_id=primo.exlibrisgroup.com(Via+Alma)`

- Tim will talk about how you can change this to fix requesting errors

# Display Logic Review

- Display Logic is used to suppress GES in certain cases. E.g.:

7	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Hide service General Electronic Service with Service = GetIt Books if exists service Resource Sharing Request
8	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Hide service Resource Sharing Request if exists service General Electronic Service with Service = ILLiad

- Creating new GESs to solve Link Resolver requesting issues will also require additional Display Logic rules

# What problems are we seeing with requesting from the link resolver record?

- Incorrect or incomplete metadata is causing the wrong request link to appear
  - Alma resource sharing link appearing for articles instead of ILLiad link
  - Most frequently seen with requests from EBSCO and Google
- Incomplete metadata resulting in poor results from Alma's locate process
  - Most frequently seen with requests from Google
  - Results in inaccurate rotas and lending requests for items you don't own
  - Best to direct these requests to ILLiad instead of Alma

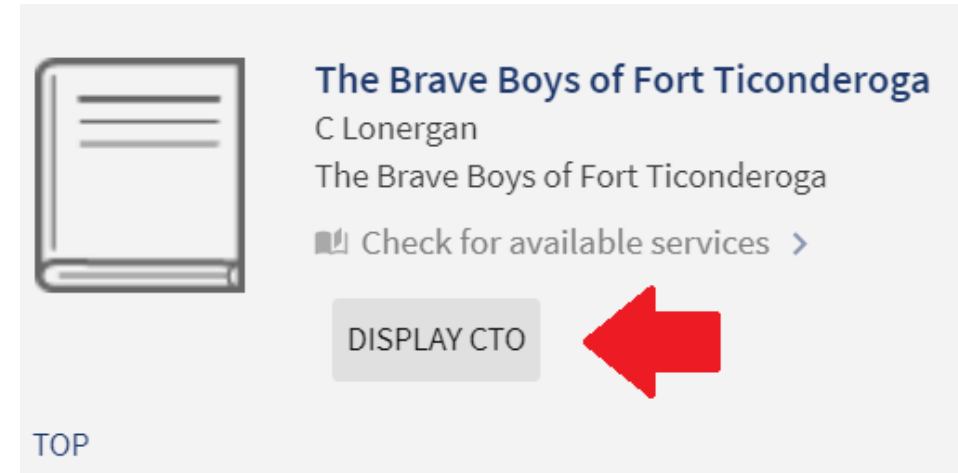


# Alma's Locate Process

- Alma does an automated z39.50 search at each campus every time a resource sharing request is submitted
- The search uses metadata included with the request
  - Author
  - Title
  - ISBN
  - OCLC Number
  - LCCN
- If this search produces a result, that campus is added to the request's rota
- Incomplete/incorrect metadata can result in poor search results and incorrect rotas

# General Strategies for Fixing Link Resolver Request Issues

- Changes meant to address specific issues can have broad impacts and may cause more problems than they solve
- Fixes should be as targeted as possible
- Problems are often specific to a particular database, so use source information



```
<u:uresolver_content xmlns:u="http://com/exlibris/urm/uresolver/xmlbeans/u">
  <u:context_object>
    <u:keys>
      <u:key id="rfr_id">google</u:key>
      <u:key id="licenseEnable">>false</u:key>
      <u:key id="memberProxyServer">https://sunypoly.idm.oclc.org/login?</u:key>
      <u:key id="sfx.sid">DEFAULT</u:key>
      <u:key id="memberProxyIp">132.174.251.13</u:key>
      <u:key id="svc.profile">viewit</u:key>
      <u:key id="rft.genre">book</u:key>
      <u:key id="memberUseProxy">Selective</u:key>
      <u:key id="vid">01SUNY_INS:01SUNY_INS</u:key>
      <u:key id="rft.aulast">Lonergan</u:key>
      <u:key id="institution">4836</u:key>
      <u:key xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" id="memberProxySalt" xsi:nil="true"/>
      <u:key id="rft.aunit">C</u:key>
      <u:key id="memberProxyType">EZProxy</u:key>
      <u:key id="rft.title">The Brave Boys of Fort Ticonderoga</u:key>
      <u:key id="customer">4800</u:key>
    </u:keys>
  </u:context_object>
  <u:context_services/>
</u:uresolver_content>
```

# ILLiad OpenURL Mapping

- OpenURLMapping Table in ILLiad's Customization Manager
- Atlas Systems Documentation:
  - <https://support.atlas-sys.com/hc/en-us/articles/360011910073-OpenURL-Configuration>

OpenURLMapping							
Id	NVTGC	URL_Ver	rfr_id	ILLiadAction	ILLiadFieldName	OpenURLFieldValues	ILLiadValue
1	ILL	Default	Default	Replace	CitedIn	<#rfr_id> <#sid>	
2	ILL	Default	Default	Replace	ESPNumber	<#rfe_dat>	
3	ILL	Default	Default	Replace	ISSN	<#rft.isbn> <#rft.issn> <#rft.eissn> <#issn> <#isbn>	
4	ILL	Default	Default	Replace	LoanAuthor	<#rft.au> <#rft.aulast>, <#rft.aufirst> <#rft.auinitm> <#aulast>, <#aufirst> <#auinitm>	
5	ILL	Default	Default	Replace	LoanDate	<#rft.date> <#date>	
6	ILL	Default	Default	Replace	LoanEdition	<#rft.edition>	
7	ILL	Default	Default	Replace	LoanPlace	<#rft.place>	

# Example #1 - Article Requests from EBSCO with "Unknown" Genre

- "Unknown" genre preventing proper GES from displaying
- Add service availability rule to ILLiad GES to account for "unknown" genre
- [https://suny-ins.primo.exlibrisgroup.com/discovery/openurl?institution=01SUNY\\_INS&id=01SUNY\\_INS:01SUNY\\_INS&lang=en&atitle=El%20mole%20se%20hizo%20de%20muchos%20chiles,%20y%20tambi%C3%A9n%20de%20siglos%20de%20experimentaci%C3%B3n&au=Esparza,%20Manuel&volume=11&issue=21&spage=51&pages=51-56&jtitle=Cuadernos%20del%20sur%20:%20revista%20de%20ciencias%20sociales&sid=EBSCO:Anthropology%20Plus:591475&genre=article&date=20050101&displayCTO=true](https://suny-ins.primo.exlibrisgroup.com/discovery/openurl?institution=01SUNY_INS&id=01SUNY_INS:01SUNY_INS&lang=en&atitle=El%20mole%20se%20hizo%20de%20muchos%20chiles,%20y%20tambi%C3%A9n%20de%20siglos%20de%20experimentaci%C3%B3n&au=Esparza,%20Manuel&volume=11&issue=21&spage=51&pages=51-56&jtitle=Cuadernos%20del%20sur%20:%20revista%20de%20ciencias%20sociales&sid=EBSCO:Anthropology%20Plus:591475&genre=article&date=20050101&displayCTO=true)

# Example #2 - Book Requests with Little Metadata

- Often coming from Google
- Little data is passed to Alma, which causes problems with the locate process
- Create ILLiad GES for this scenario
- [https://suny-ins.primo.exlibrisgroup.com/discovery/openurl?institution=01SUNY\\_INS&vid=01SUNY\\_INS:01SUNY\\_INS&aulast=Lonergan&auinit=C&title=The%20Brave%20Boys%20of%20Fort%20Ticonderoga&sid=google&displayCTO=true](https://suny-ins.primo.exlibrisgroup.com/discovery/openurl?institution=01SUNY_INS&vid=01SUNY_INS:01SUNY_INS&aulast=Lonergan&auinit=C&title=The%20Brave%20Boys%20of%20Fort%20Ticonderoga&sid=google&displayCTO=true)

# Example #3 – Article requests from Google with Incorrect Genre

- Article request, but Alma resource sharing link displays in Primo
- "Book" genre is causing wrong GES to display
- Create GES for this scenario with correct genre in URL template
- [https://suny-ins.primo.exlibrisgroup.com/discovery/openurl?institution=01SUNY\\_INS&vid=01SUNY\\_INS:01SUNY\\_INS&volume=68&date=2013&aulast=Abdullah&spage=313&id=doi:10.1016%2Fj.proeng.2013.12.185&auinit=MIHC&title=Procedia%20engineering.&atitle=Optimization%20of%20Tribological%20Performance%20of%20hBN%2FAL2O3Nanoparticles%20as%20Engine%20Oil%20Additives&sid=google&displayCTO=true](https://suny-ins.primo.exlibrisgroup.com/discovery/openurl?institution=01SUNY_INS&vid=01SUNY_INS:01SUNY_INS&volume=68&date=2013&aulast=Abdullah&spage=313&id=doi:10.1016%2Fj.proeng.2013.12.185&auinit=MIHC&title=Procedia%20engineering.&atitle=Optimization%20of%20Tribological%20Performance%20of%20hBN%2FAL2O3Nanoparticles%20as%20Engine%20Oil%20Additives&sid=google&displayCTO=true)

# Thank you!

- Jill Locascio - SUNY Optometry
- Stephanie Helsher & Heidi Webb - SUNY Upstate Medical
- Joe Riggie - Buffalo State College
- Angela Persico – University at Albany
- Yvonne Kester – SUNY New Paltz
- Bill Jones – SUNY Geneseo

# References

- [Alma/Primo Link Resolver](#) - SLSS Presentation, 9/12/19
- [How will the openurl link resolver work in Primo VE?](#) SLSS FAQ



Questions?