

# **ERM Basics: Testing Electronic Resources in Primo**

January 15, 2020 | Alana Nuth

# Goals of this training:

- Demonstrate ways to test access to electronic resources in Primo
- Review what to look for when testing access
- Share expected times for Primo publishing and indexing
- Share questions to consider when performing basic troubleshooting

# Required Roles in Alma

To manage electronic resources in Alma, you must have the following roles:

- Electronic Inventory Operator
- Electronic Inventory Operator Extended (required for delete operations)
- Repository Manager
- CDI Operator (once Central Discovery Index replaces Primo Central Index)

# Test Access in Alma

## Why Test in Alma?

- Confirm that the content and access is set up correctly
- Check linking to make sure that the right kind of link is selected: static URL, parser parameters, etc.
- Make sure all the necessary parameters are in place, such as Location ID, Account ID, and/or Customer ID

# Test From Collection

★ >> Acquisitions Resources Discovery Fulfillment Admin Analytics Alfred C O'Connell Library - Main Desk

Electronic collection ▾ Keywords ▾ gale cengage

Electronic Collections (1 - 12 of 12) | gale cengage

🏠 Institution 🌐 Network 👥 Community

Sort by : Rank ▾

1 👤 **Gale Cengage Business Insights: Essentials** Portfolio List (10567) Edit Collection ...

**Type:** Aggregator package  
**Services:** Full Text (Available)  
**Interface name:** Galegroup  
**Linking Level:** Article  
**Creation Date:** 06/23/2019 06:04 AM  
**Modification Date:** 12/04/2019 00:18 AM

**In CDI:** Yes  
**Active for Search in CDI:** No  
**CDI Search Rights:** Free  
**CDI Full Text Rights:** Subscription (Linkresolver)  
**CDI Full Text Linking:** Linkresolver  
**Collection ID:** 6113084140004832

- Delete
- View
- Order
- Create E-Activation Task
- Publishing information
- Edit Service**
- View It
- Report To Ex Libris
- Add Reminder

# Test From Collection

Check the linking tab to make sure that the link is set up correctly. If you see something like \$\$LOC\_ID in the parser parameters, you may need to add that parameter lower down the page.

< Electronic Service Editor

Cancel

Save

Collection name Gale Cengage Business Insights: Esse...  
Service type Full Text  
Provider package code (DB id) XI7

Collection ID 6113084140004832  
Service ID 6213084130004832

[View all services](#)



Activation

Service Description

Linking

Portfolios

Notes

History

General Linking Information

Parser Gale::OpenURL

Parser (override)

Parser parameters

url= https://find.gale.com/openurl/openurl &loc\_id=\$\$LOC\_ID &dbase=BIE &art=\$\$ART & url2=https://link.gale.com/apps

Parser parameters (override)

URL type



Dynamic URL



Parser Parameters

# Test From Collection

Scroll down to see if you need to add any Linking Parser Parameters. See [What Electronic Collections Require Special Parameters to Work, and How Do I Add These Parameters?](#)

< Electronic Service Editor

Cancel

Save

Proxy enabled  No  Yes

Proxy selected **Default ( currently: EzProxy )**

Link Resolver Plugin

Plugin name -

Linking Parser Parameters

Parameter	Value
1 LOC_ID	<input type="text" value="gencc_main"/>
2 ART	<input type="text"/>

# Test From Collection

Click on the Portfolio tab and select a portfolio to test

Electronic Service Editor Cancel Save

Collection name: Gale Cengage Business Insights: Esse... Collection ID: 6113084140004832  
Service type: Full Text Service ID: 6213084130004832 [View all services](#)  
Provider package code (DB id): XI7

Activation Service Description Linking **Portfolios** Notes History

1 - 20 of 10,567 ISBN

[Move Set of Portfolios](#) [Activate/Deactivate](#) [Load Portfolios](#) [+ Add](#) [- Delete](#)

Status: All CZ Linking: All COUNTER Platform: All

	Availability	Identifier	Title	Coverage	Material Type
1	<input type="checkbox"/>		2537-9100 EG	Available from 2017.	JOURNAL
2	<input type="checkbox"/>		- Consumer Health News (English)	Available from 2009.	JOURNAL

1 of 529

- Edit
- Move
- Delete
- View
- Test access**
- Deactivate
- View hidden



[Display in a new window](#)

Source: EG [2537-9100] [2537-9097]

Full text available at: [Gale Cengage Business Insights: Essentials](#)  
Available from 2017.

**GALE BUSINESS INSIGHTS: ESSENTIALS**

Research. Analyze. Interpret. Understand.

Enter name or ticker symbol

Company ▾

Search

[Advanced Search](#)

Home

Companies ▾

Industries ▾

Comparison Charts ▾

Glossary

Saved Items (0)

Search History

## EG

### About this Publication

**Title:** EG

**ISSN:**

**Format:** Magazine/Journal

# Test From Portfolio

You can also search Alma for a specific portfolio, like an eBook, and test from there

< Portfolios List (1 - 20 of 2,932) ←

Back

Activate

Execute

Portfolio List for: EBSCOhost Education Source

Select All

Title



1  100 semesters my adventures as student, professor, and university president, and what I learned along the way /

**Identifier:** 0-691-12725-5

**Service:** Full Text

**Material Type:** Book

**Creation Date:** 06/20/2019 10:42:38 EDT

**Modification Date:** 06/20/2019 10:43:17 EDT

[Other details](#)

Edit Portfolio

Deactivate



View

Document Delivery

Order

Create E-Activation Task

Test access

Report To Ex Libris

2  101 best Web sites for teacher tools and professional development

Edit Portfolio

Deactivate



# Test From Primo VE

Why test from Primo VE when you've already tested access in Alma?

- Make sure that content was published and is available in Primo so that patrons can see and access it
- Ensure that the resource is available before notifying a faculty requester that item is available, or before adding it to a reserve list
- Verify that the proxy is working for off-site access

# Test From Primo VE - Timing

When should you expect to see Alma content show up in Primo?

- Alma bib records for ejournals, ebooks, streaming films, and other electronic content will appear in 10 to 30 minutes
- Article/chapter level searching will be available in a week to 10 days
  - Note that you need to have the Primo Central Index collection active for article-level searching
  - You'll have to wait for the availability job to run to see article-level results

# Test From Primo VE - Portfolio Bib Record

- Search Primo for a known portfolio
- Use Alma to select a portfolio (journal title, ebook title, or title of a streaming film) from the electronic collection that you would like to test.
- Copy the portfolio name from Alma and paste it into the Primo search box.

2  **EBSCOhost Education Source**

**Type:** Aggregator package

**Services:** Full Text (Available)

**Interface name:** EBSCOhost

**Linking Level:** Article

**In CDI:** Yes

**Active for Search in CDI:** No

**CDI Search Rights:** Free

**CDI Full Text Rights:** Subscription  
(link resolver)

[Portfolio List \(2932\)](#)

[Edit Collection](#)



# Test From Primo VE - Portfolio Bib Record

Copy one of the portfolio titles to search in Primo

< Portfolio List for EBSCOhost Education Source (1 - 20 of 2,932 )

Activate

Deactivate

Back

Select All

Sort by : Rank ▾

ISBN ▾



 [The Eta Sigma Gamman.](#)

EBSCOhost Education Source: getFullTxt

**ISSN:** 8756-5943

Available from 2005.

**Access Type:** Current

**Electronic Material Type:**  
Journal

**Creation Date:** 11/17/2019  
03:51:54 EST

**Modification Date:** 11/17/2019  
03:51:54 EST



Peer Reviewed

**Portfolio ID:**  
5353646680004833

**Service ID:**  
6243849930004833

**Collection ID:**  
6143849940004833

Edit Portfolio

Order



# Test From Primo VE - Portfolio Bib Record

Search Primo:

- Make sure that content shows as available
- Make sure link works both on and off-campus

The screenshot displays the Primo VE search interface. At the top, a search bar contains the text "The Eta Sigma Gamman." with a search icon and a close button. Below the search bar, a yellow banner prompts the user to "Sign in to get complete results and to request items" with a "Sign in" button and a "DISMISS" option. The main results area shows "2 Results". On the left, there are filters for "Modify Your Results", "Sort by Relevance", and "Availability" (set to "Available online"). The first result is a journal entry: "1 JOURNAL The Eta Sigma Gamman. Eta Sigma Gamma. 1969-1992 PEER REVIEWED". A red circle highlights the "Available Online" link at the bottom of the entry.

Journal Search The Eta Sigma Gamman. X 🔍

Sign in to get complete results and to request items Sign in X DISMISS

2 Results

Modify Your Results

Sort by Relevance ▾

Availability ^  
Available online

1 JOURNAL The Eta Sigma Gamman.  
Eta Sigma Gamma.  
1969-1992  
PEER REVIEWED  
[Available Online >](#)

# Test From Primo VE - Article/Chapter

## Why test?

- Make sure patrons can get to article-level content
- Content will not appear in a default, unexpanded search until availability publishing runs, which can take a week to 10 days
- Make sure search index is active:
  - If you are adding a portfolio to a collection that's already active, shouldn't be a problem. New collections may need to be activated in the PCI.
- It's possible to test content before availability publishing runs:
  - Perform an expanded search (Expand My Results). If an article result says "unavailable," open the full record to see if on the fly holdings look-up populate View Online with active links
- It's a good idea to test access both before availability cycle runs and after to make sure content appears in unexpanded search



# Test From Primo VE - Article/Chapter

Finding content to test:

- Try searching by portfolio title to see if you can get article results for that journal or ebook title, but it can be hit or miss
- Search by portfolio title and filter by resource type: article and collection, but this method will only work if your collection has an exact match in the Primo Central Index for searching
- Search for the journal title in Google, go to the journal site and navigate to the TOC for an issue from the past year, copy an article and search for that article in Primo VE. If you pick an article that is too recent, the content may not be indexed by the PCI yet.
- Search in the stand-alone version of whatever database you're activating, and find a full-text article that should come from that database. Copy the title and search for it in Primo VE.

# Test From Primo VE - Workflow Example

## Gale Academic OneFile:

- Test a portfolio from Alma:
  - Search for collection in IZ
  - Edit Service
  - Go to Portfolio Tab
  - Select a Portfolio and test access

The screenshot shows the Alma interface with the search results for 'gale academic onefile'. The search bar contains 'gale academic onefile'. Below the search bar, there are tabs for 'Institution', 'Network', and 'Community'. The search results show '1 Gale Cengage Academic OneFile'. The details for this collection are displayed, including 'Type: Aggregator package', 'Services: Full Text (Available)', 'Interface name: Galegroup', 'Linking Level: Article', 'Creation Date: 06/11/2019 02:58:21 EDT', 'Modification Date: 12/04/2019 24:14:36 EST', 'In CDI: Yes', 'Active for Search in CDI: No', 'CDI Search Rights: Free', 'CDI Full Text Rights: Subscription (Linkresolver)', 'CDI Full Text Linking: Linkresolver', and 'Collection ID: 6138877120004825'. A menu is open over the search results, with 'Edit Service' circled in red. Other menu items include 'View', 'Activate for Search in CDI', 'Create E-Activation Task', 'Publishing information', 'View It', 'Report To Ex Libris', and 'Add Reminder'. There are also buttons for 'Portfolio List (10253)' and 'Edit Collection' circled in red.

The screenshot shows the 'Electronic Service Editor' interface. The top bar contains 'Cancel' and 'Save' buttons. Below the top bar, there is a summary section with 'Collection name: Gale Cengage Academic OneFile', 'Service type: Full Text', and 'Provider package code (DB id): IAO'. The 'Portfolios' tab is selected and circled in red. Below the tab, there is a search bar with 'natural history' entered and circled in red. A dropdown menu is open over the search bar, with 'Test access' circled in red. The menu items are 'Edit', 'Move', 'View', 'Test access', 'Deactivate', and 'View hidden'. Below the search bar, there are filters for 'Status: All', 'CZ Linking: All', and 'COUNTER Platform: All'. At the bottom, there is a table with columns 'Availability', 'Identifier', 'Title', 'Coverage', and 'Material Ty'. The table contains one row with '1', a checkbox, a person icon, '0028-0712', 'Natural history.', 'Available from 1997.', and 'JOURNAL'. A red arrow points from the 'Test access' option in the menu to the 'Test access' button in the table row.

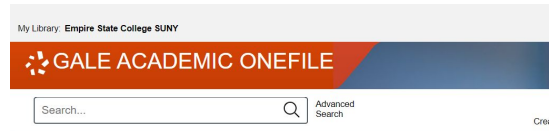
# Test From Primo VE - Workflow Example

## Gale Academic OneFile: Test Access in Alma

- Access display in Alma
- Sometimes, you must click a link to display the full-text in a new window

< Online Services

[Display in a new window](#)



## Natural History

### ABOUT THIS PUBLICATION

Index coverage: January 1, 1977 - Current

Full-text coverage: February 1, 1997 - Current ⓘ

**(10 day delay due to publisher embargo period)**

Some text may not be reproducible due to publisher restrictions.

2019 ▾

[December 1, 2019, Vol.128, Issue 1](#)

[November 1, 2019, Vol.127, Issue 10](#)

[October 1, 2019, Vol.127, Issue 9](#)

[September 1, 2019, Vol.127, Issue 8](#)

# Test From Primo VE - Workflow Example

Gale Academic OneFile: Test Access in Primo VE:

- Find an article that should be full-text in Gale Academic OneFile by searching database or by going to journal webpage

trees  Advanced Search

Nov. 8, 2019 7,919 words Article 1530L

The infiltration of stormwater runoff for use by urban trees is a major co-benefit of green infrastructure for desert cities with limited water resources. However, the effects of this passive irrigation versus regular...

[Desert Trees: Reserves of energy, slowly invested over decades, allow desert trees--even woodlands--to thrive.](#)

Authors: ~~Richard Aronson~~ and James Aronson  
From: Natural History (Vol. 127, Issue 10) Peer-Reviewed

Nov. 1, 2019 3,252 words Article 1380L

In many languages, desert is essentially synonymous with the absence of life. We know this is not true--images of moonlit struggles between small furry mammals and lightning-fast snakes come to mind, but certainly not...

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2018 Impact Factor 0.837

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< **Volume 53, 2019** Vol 52, 2018 Vol 51, 2017 >

Issue 35-36 33-34 31-32 29-30 27-28 >

# Test From Primo VE - Workflow Example

Gale Academic OneFile: Test Access in Primo VE

- Copy article title and search in Primo VE.
- Note that article in database might be indexed slightly differently in Primo VE. In this example, full title is “Desert Trees: Reserves of energy, slowly invested over decades, allow desert trees--even woodlands--to thrive,” which results in no hits in Primo VE. Punctuation can cause search problems, and in this case, the article was in Primo without the subtitle:



The screenshot shows a Primo VE record for an article. On the left, there is a small box with the number '6' and a logo for 'NATURAL HISTORY' with the word 'HISTORY' in red. To the right of the logo, the word 'ARTICLE' is displayed in a light blue font. Below this, the title 'Desert Trees' is shown in a larger blue font with a yellow underline. Underneath the title, the author information 'Aronson, Thibaud ; Aronson, James' and the publication details 'Natural History, Nov 2019, Vol.127(10), pp.16-23' are listed. A purple icon with an eye and the text 'PEER REVIEWED' are positioned below the author information. At the bottom, there is a green link icon followed by the text 'Go to Full-Text >'. On the far right of the record, there are four icons: a blue link icon, a blue quote icon, a blue pushpin icon, and a blue three-dot menu icon.

# Test From Primo VE - Workflow Example

Gale Academic OneFile: Test Access in Primo VE

- Check that the content shows as available (if availability cycle has run)
- Make sure link works both on and off-campus



The screenshot shows a search result card for an article. On the left, there is a small square icon with the number '6' and a thumbnail image of the journal cover for 'NATURAL HISTORY'. To the right of the thumbnail, the word 'ARTICLE' is displayed in a small, grey font. Below this, the title 'Desert Trees' is shown in a larger, blue font with a yellow underline. Underneath the title, the authors 'Aronson, Thibaud ; Aronson, James' and the publication information 'Natural History, Nov 2019, Vol.127(10), pp.16-23' are listed. A purple icon with an eye symbol and the text 'PEER REVIEWED' are positioned below the authors. At the bottom of the card, there is a green link with a chain icon and the text 'Go to Full-Text >'. On the right side of the card, there are four icons: a chain link, a quote mark, a pushpin, and a three-dot menu.

6  ARTICLE    

Desert Trees  
Aronson, Thibaud ; Aronson, James  
Natural History, Nov 2019, Vol.127(10), pp.16-23  
 PEER REVIEWED  
 [Go to Full-Text >](#)

# Basic Troubleshooting

First, identify which system(s) is the source of the issue:

Alma:

- Can you locate the portfolio in Primo and see available electronic services in View Online?
- Upon clicking an electronic service in View Online, are you directed to the appropriate vendor platform or login page for off-campus access?

Vendor:

- On the vendor platform, can you access full-text?
- Do you see an error message about the item not being found or not being available?

EZ Proxy:

- Does an error message appear when off-campus which says the host is not configured correctly?
- Can users authenticate properly and get to the vendor platform?

# Basic Troubleshooting

If you can't resolve the problems that you find when testing, you may need to involve your campus Systems Librarian or pursue the issue through a Basecamp post or a Salesforce case.

The next webinar in this series, [Advanced ERM: Troubleshooting Linking](#), will cover what to do if you can't easily fix the problems you've found when testing content in Alma and Primo.



# References

- [How long should things like activating e-collections, making changes to the Primo VE interface, indexing, etc. take to fully show up in the system so we can know when to test?](#) SLSS FAQ