Alternative Coverage & Open Access Collections in Primo Central
Guidelines and Recommendations

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Overview

● Who we are — Our institutions and consortium
● Our process and guiding principles
  ○ Open Access Recommendations
  ○ Alternative Coverage Recommendations
● Miscellaneous Tips
● Q & A
Metropolitan State University

11,505 total students

6,220 student full-year equivalents (2015–2016)

90% undergraduate students

43% students of color

9 librarians + 2 lib admins +11 staff

Electronic Resources:

- 218 database packages managed in Serials Solutions 360 Core, 360 Link, e-Journal Portal
- Discovery through Summon
Normandale Community College

14,993 credit students (fall 2018)
6,865 student full-year equivalents
45% students of color
77% age 24 or younger
6 librarians + 5 staff (plus 3 vacancies)

Electronic Resources:
- 175 database packages managed in Serials Solutions 360 Core, 360 Link, e-Journal Portal
- Discovery through Summon
The MnPALS Library Consortium

A large consortium of university, college, government, and special libraries in Minnesota

**Membership:**
- All Minnesota State Colleges and Universities
  - 7 universities
  - 30 community and technical colleges
- 6 state government libraries
- 6 private colleges and universities
- 3 special libraries

### Alma/PrimoVE Migration Work Groups

- Acquisitions/Serials
- Discovery
- **Electronic Resources Management (ERM)**
- Fulfillment
- Resource Management (Cataloging)
- Resource Sharing (ILL)
The ERM workgroup was specifically tasked with the following:

- Recommendations for activations in the Alma CZ and Primo Central
- Recommendations for testing and configuring ER before and after Go Live
- To investigate, test, and make recommendations regarding Alma ERM functionality
Open Access packages in Primo Central: Opting out?

By default, ExLibris activates all open access packages in Primo Central

- By nature, OA packages are a can of worms (quality, language, format, subject, and full text availability)
- ER best practice calls for being fairly selective with OA
- In a large, diverse consortium — the majority of institutions do not have much experience with ER management — there was a need for the workgroup to make a recommendation for OA resource activation in Primo Central
Utilized an ExLibris spreadsheet for OA packages as a base list, and added three columns:

- Activate?
- Description/Subject
- Reason for Non-Activation

Criteria Considered

- Full vs. partial access
- Primary language of content
- Nature of content (institutional repository, journals, ebooks, etc.)
- Subject (interdisciplinary, subject specific, etc.)
OA Packages in Primo Central: Recommendations

In the Activate column for each resource, **three options** were possible:

- **Yes** (open access textbooks, big publisher interdisciplinary collections)
- **No** (most partial access collections, institutional repositories, non-English, Wikipedia)
- **Optional** (subject specific collections)
Example snippet from OA recommendations

<table>
<thead>
<tr>
<th>Collection Name</th>
<th>Provider Name</th>
<th>Content Type</th>
<th>Subject Headings Keywords</th>
<th>Fulltext Searchable</th>
<th>Open Access</th>
<th>Activate?</th>
<th>Description/Subject</th>
<th>Reason for Delection/Non-Activation</th>
</tr>
</thead>
<tbody>
<tr>
<td>JSTOR Archival Journals - Religion &amp; Theology</td>
<td>JSTOR</td>
<td>Journals</td>
<td>Yes</td>
<td>Yes</td>
<td>Partial</td>
<td>NO</td>
<td></td>
<td>Partial</td>
</tr>
<tr>
<td>JSTOR Primary Sources - 19th Century Diaries</td>
<td>JSTOR</td>
<td>Pamphlets</td>
<td>No</td>
<td>Yes</td>
<td>Partial</td>
<td>NO</td>
<td></td>
<td>Partial</td>
</tr>
<tr>
<td>JSTOR. Open Access</td>
<td>JSTOR</td>
<td>Articles</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Multidisciplinary</td>
<td></td>
</tr>
<tr>
<td>Delpher Boeken Basiscollectie (1781-1820)</td>
<td>Koninklijke Bibliotheek</td>
<td>Books</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>NO</td>
<td>Dutch language resources</td>
<td></td>
</tr>
<tr>
<td>Korea Science</td>
<td>Korea Institute of Science</td>
<td>Journals</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>NO</td>
<td>Korean language resources</td>
<td>requires activation in Alma C2</td>
</tr>
<tr>
<td>KoreaMed Synapse</td>
<td>KoreaMed</td>
<td>Journals</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Partial</td>
<td></td>
<td>Partial</td>
</tr>
<tr>
<td>Lirias (Institutional Repository)</td>
<td>KU Leuven Association</td>
<td>Various</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>NO</td>
<td></td>
<td>Institutional repository</td>
</tr>
<tr>
<td>Leeds Met Open Search (Institutional Repository)</td>
<td>Leeds Metropolitan University</td>
<td>Various</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>NO</td>
<td></td>
<td>Institutional repository</td>
</tr>
<tr>
<td>Leiden University Repository (Institutional Repository)</td>
<td>Leiden University</td>
<td>Various</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>NO</td>
<td></td>
<td>Institutional repository</td>
</tr>
<tr>
<td>Libertas Academica Open Access Journal</td>
<td>Libertas Academica</td>
<td>Articles</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>YES</td>
<td>Medical</td>
<td>Restricted for delivery</td>
</tr>
<tr>
<td>American Memory</td>
<td>Library of Congress</td>
<td>Images, Scores, &amp; Partial</td>
<td>No</td>
<td>Yes</td>
<td>Optional</td>
<td></td>
<td>American history through Library of Congress images and documents</td>
<td></td>
</tr>
<tr>
<td>Library of Congress Collections of History</td>
<td>Library of Congress</td>
<td>Various</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Optional</td>
<td></td>
<td>American history through Library of Congress images and documents</td>
</tr>
<tr>
<td>Library of Congress Digitized Serials</td>
<td>Library of Congress</td>
<td>Journals</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Optional</td>
<td></td>
<td>American history through Library of Congress images and documents</td>
</tr>
</tbody>
</table>

Link to full recommendation: [https://islandora.mnpals.net/mnpals/islandora/object/MNPALS%3A240](https://islandora.mnpals.net/mnpals/islandora/object/MNPALS%3A240)
Activating OA Packages: Additional Considerations

Consider the size of your local & subscribed collections when thinking about turning on big OA packages

- Collections such as Hathitrust, Project Gutenburg, etc., contain hundreds of thousands of titles, which can easily bury your local and subscribed content in Primo search results
- You can boost the relevancy ranking of Alma records as a whole, but you can’t alter the relevancy ranking of OA records specifically
## OA Content in Alma/Primo: Additional Steps

### Link Resolving

OA packages listed in Primo Central as "**Link via Linkresolver**" require the activation of a corresponding collection in the CZ as they use the Alma link resolver for full text linking.

**Search:** Free  
**Full Text:** Open Access  
**Link to Full Text:** Link via Linkresolver

### OA Collections Not on ExLibris’s OA List

Some subscription packages contain OA titles but aren’t listed in ExLibris’s OA list. These OA titles can be made available (without a subscription) through—

1) selective activation in the CZ and  
2) PC activation of subscription-only collection

Example:  
**CZ:** Bentham Open Free &  
**PC:** Bentham Science - Journals
Primo Central Collection Activation Profile

Consortium Activation Inheritance can be turned on/off easily
PCI Activations at the Consortium and Library Levels

### Principles of Consortium Activation
- Primo Central activations should be handled at the consortium level for any collections available to all member libraries.
- Alt coverage activations should be conservative so most libraries opt in to inheritance and then add any additional alt coverage desired.

### Guidelines for Libraries
- Do **NOT** activate Open Access collections solely for alternative coverage purposes (HathiTrust, etc.)
- Do **NOT** activate “Search Rights: Subscription” collections unless you have a subscription
- **Selectively** activate CrossRef collections to avoid duplicate records
True Index Coverage Percentages?

Index coverage percentages given by ExLibris assume all alt coverage collections activated.

Without devoting time to extensive overlap analysis, we don’t know the true percent covered.
## Examples of Alt Coverage We Chose **NOT** to Activate

<table>
<thead>
<tr>
<th><strong>ALL CrossRef Collections</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Advised libraries to activate CrossRef collections for any publisher <strong>NOT</strong> already activated in Primo Central.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Subscription Collections We Don’t Subscribe to— If They Link on the Collection Level Only</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>PC Collections with &quot;<strong>Subscription (Collection Level)</strong>&quot; full-text rights do not use the link resolver so cannot be limited to only showing users records they have access to. Examples: Bridgeman Education; Europeana.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Records Not Available in English</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: 国立国会図書館蔵書 NDL-OPAC</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>HathiTrust</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>We would rather libraries opt in to HathiTrust than to opt out of consortium inheritance.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Collections Needing Testing</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Collections we wanted more time to test in the PrimoVE sandbox. Examples: ECONIS, NARCIS, SwePub.</td>
</tr>
</tbody>
</table>
Unrelated Miscellaneous Tips

- **Set It and Forget It Redirect Server**
  To manage quickly switching your URL for outbound OpenURL requests at vendor sites: https://developers.exlibrisgroup.com/blog/Alma-link-resolver-set-it-and-forget-it/
  Related: Re-assess outbound OpenURL settings with vendors well ahead of go-live.

- Take advantage of direct access to ExLibris implementation staff in **Basecamp**.

- Keep a **detailed to-do list** of things that can only be done in the small window between when you get access to your cut over data and go-live (link parameter customizations, etc.).

- Ask Reference librarians to do test searches in PrimoVE with **real queries**.
Questions?

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ExLibris Alt Coverage and Open Access spreadsheets:  
https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Product_Documentation/Primo_Central_Indexing