

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)

PALS Migration to Alma/PrimoVE: ERM Workgroup

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

Open Access Packages in Primo Central: Criteria

Utilized an ExLibris spreadsheet for OA packages as a base list, and added three columns:

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

Criteria Considered

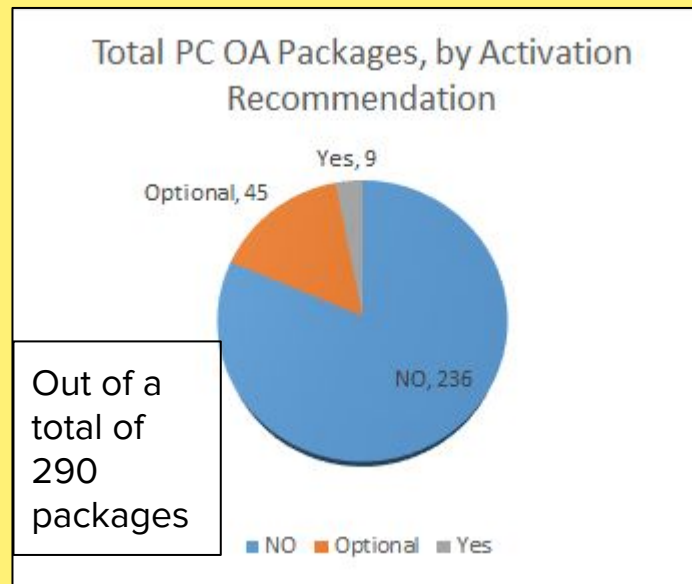
- Full vs. partial access
- Primary language of content
- Nature of content (institutional repository, journals, ebooks, etc.)
- Subject (interdisciplinary, subject specific, etc.)

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)

Breakdown of Activation Recommendations



Example snippet from OA recommendations

Collection Name	Provider Name	Content Type	Subject Headings Keywords	Fulltext Searchable	Open Access	Activate?	Description/Subject	Reason for Deselection/Non-Activation
JSTOR Archival Journals - Religion & The	JSTOR	Journals	Yes	Yes	Partial	NO		Partial
JSTOR Primary Sources - 19th Century B	JSTOR	Pamphlets	No	Yes	Partial	NO		Partial
Journals: Open Access	JSTOR	Articles	Yes	No	Yes	Yes	Multidisciplinary	
Delpher Boeken Basiscollectie (1781-18	Koninklijke Bibliotheek	Books	Yes	Yes	Yes	NO		Dutch language resources
Korea Science	Korea Institute of Scien	Journals	Yes	No	Yes	NO		Korean language resources; requires activation in Alma CZ
KoreaMed Synapse	KoreaMed	Journals	Yes	No	Partial	NO		Partial
Lirias (Institutional Repository)	KU Leuven Association	Various	Yes	No	Yes	NO		Institutional repository
Leeds Met Open Search (Institutional Re	Leeds Metropolitan Uni	Various	Yes	No	Yes	NO		Institutional repository
Leiden University Repository (Instituti	Leiden University	Various	Yes	No	Yes	NO		Institutional repository
Libertas Academica Open Access Journa	Libertas Academica	Articles	Yes	No	Yes	NO	Medical	Restricted for delivery
American Memory	Library of Congress	Images, Scores, B	Partial	No	Yes	Optional	American history through Library of Congress images and documents	
Library of Congress Collections of Histo	Library of Congress	Various	Yes	No	Yes	Optional	American history through Library of Congress images and documents	
Library of Congress Digitized Serials	Library of Congress	Journals	Yes	No	Yes	Optional	American history through Library of Congress images and documents	

Link to full recommendation:

<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 Gutenberg, 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

The screenshot displays the Primo Central Collection Activation Profile interface. The main heading is "Primo Central Collection Activation - Providers List (1 - 10 of 327)". A red box highlights the "Inherit Consortium Central Office resources" checkbox, which is checked. Below this, there is a table of providers and a list of active resources by consortium.

Primo Central Collection Activation - Providers List (1 - 10 of 327)

Inherit Consortium Central Office resources View all resources activated by the Consortium Central Office

Provider Name Filter

	Provider's Name	# Collections
1	1science	1
2	ABC-CLIO	15
3	ABES (L'agence bibliographique de l'enseignement supérieur)	3
4	Accessible Archives	31
5	ACI Information Group	1

Active Resources By Consortium (5 providers)

Filter Resources

1. Encyclopædia Britannica, Inc. (1 resources)
 1. Britannica Online Academic Edition
2. Gale (6 resources)
 1. Health Reference Center Academic
 2. Business Insights: Essentials
 3. Informe Academic
 4. Gale Virtual Reference Library (GVRL)
 5. Academic OneFile**
 6. General OneFile**
3. ProQuest (10 resources)
 1. Global Newsstream
 2. ProQuest SciTech Collection
 3. ProQuest Central
 4. Ebook Central Perpetual and DDA titles
 5. Social Sciences Premium Collection
 6. ProQuest Business Collection

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.

Collection	Provider	Index Coverage	Alternative Collections for Activation
General Reference Center Gold	Gale	93%	SwePub Articles (National Library of Sweden (Kungliga biblioteket - Sveriges nationalbibliotek))
			ProQuest Discovery
			General OneFile (Gale)
			Business Insights: Essentials (Gale)
			SciTech Premium Collection (ProQuest)
			ProQuest Central (ProQuest)
			ProQuest Social Sciences Premium Collection (ProQuest)
			国立国会図書館蔵書 NDL-OPAC (National Diet Library Online Public Access Catalog)
			ECONIS (German National Library of Economics (Deutsche Zentralbibliothek für Wirtschaftswissenschaften))
			Scopus (Elsevier)*
			General Science Collection
Scopus (Elsevier)*			
Academic OneFile (Gale)			
ProQuest SciTech Collection (ProQuest)			
SciTech Premium Collection (ProQuest)			
oaFindr (1Science)*			
MEDLINE/PubMed (U.S. National Library of Medicine (NLM))			
SwePub (National Library of Sweden (Kungliga biblioteket - Sveriges nationalbibliotek))			
SwePub Articles (National Library of Sweden (Kungliga biblioteket - Sveriges nationalbibliotek))			
NARCIS (Royal Netherlands Academy of Arts and Sciences)			

93%??

100%??

Examples of Alt Coverage We Chose **NOT** to Activate

*** ALL CrossRef Collections ***

Advised libraries to activate CrossRef collections for any publisher **NOT** already activated in Primo Central.

Subscription Collections We Don't Subscribe to— *If They Link on the Collection Level Only*

PC Collections with “**Subscription (Collection Level)**” 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.

Records Not Available in English

Example: 国立国会図書館蔵書 NDL-OPAC

HathiTrust

We would rather libraries opt in to HathiTrust than to opt out of consortium inheritance.

Collections Needing Testing

Collections we wanted more time to test in the PrimoVE sandbox.
Examples: ECONIS, NARCIS, SwePub.

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