"Primo is broken, can you fix it?"
Converting anecdotal evidence into e-resource access solutions

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CQUniversity

- Main campus - Rockhampton, Queensland
- 11 campuses in Queensland and 4 in other states (Melbourne, Sydney, Perth and Adelaide) plus several Study Centre/Hubs
- Over 30,000 students
- 16,000 studying on campus
- 13,000 studying via distance education
- VET, Undergraduate, Postgraduate and Research Higher Degree courses
CQUniversity Library

- Libraries at 14 campuses with main library at Rockhampton North
- Combined Library and IT service
- Implemented Ex Libris Alma and Primo in late 2016
- Implementation faster than Ex Libris’ ‘Fast’ offering
- Implemented Leganto in 2018
- EZproxy and ADFS for authentication
Introduction

• The problem
• Contributing factors
• The approach
• Errors and major issues
• Statistics
• EBSCO in-depth
• ‘No full text available’ error
• Conclusion/outcome
The problem

• Alma/Primo implemented quickly in late 2016
• Anecdotal reports of broken links in Primo during 2017, particularly off-campus EBSCO links
• Limited staff resources to optimise use of Alma/Primo and troubleshoot issues
• New Digital Access Specialist position created in 2018
• Main priority - identify and fix electronic resource access problems
Disclaimer

• Not intended to make Ex Libris or EBSCO look bad
• Unforeseen issues resulting from a configuration choice made by CQU
• Both companies have gone above and beyond to help resolve issues
Contributing factors

- Fast implementation of Alma/Primo
- Limited staff resources
- EBSCOhost database authentication moved from EZproxy to SSO
Approach

- Sought linking problem examples from library staff
- Devised a plan for resolving issues including:
  - Systematic check of P2E records from Virtua (4232 portfolios)
  - Check of all parsers in Alma (particularly EBSCO parsers)
  - Check static URLs are correct (particularly EBSCO static URLs)
  - Sample check of collection and portfolio service linking configuration (in particular whether EZproxy is enabled or not, with initial focus on EBSCO)
  - Check stanzas in the EZproxy configuration file
Cause of errors

• Incorrect metadata in Primo Central Index (PCI)
• Incorrectly configured parsers in Alma
• Errors in electronic service linking configuration
  – generic static URLs for EBSCO resources
  – EZproxy enabled for EBSCO resources
• Electronic resources not configured or configured incorrectly in EZproxy
• Limitations of EBSCO link resolver (requires vol & issue number)
• Incorrect metadata in the target databases
• Insufficient metadata in a PCI records
• Incorrect coverage dates or volume/issue numbers in Alma
• Links not proxied in Primo
• Incorrect availability
Major problems found

- **EBSCOhost links**
  - Alma parsers
  - Static URLs
  - EBSCO Link Resolver Plugin
  - EBSCO’s link resolver
  - Dynamic URL

- **EZproxy not enabled on some collections/portfolios**

- **EZproxy config.txt stanzas not maintained**

- **Standalone portfolios from Virtua - Static URLs not maintained**

- ‘No full text available’ error in Primo
Some statistics

- 15,000 Kanopy standalone portfolios not proxied - moved to collection
- Approx. 2500 other standalone not proxied - came from old library system
- 10 collections not proxied
- 2 collections needed to be deactivated
- 1 collection with 2019 portfolios we didn’t subscribe to
- 2 collections with incorrect parser parameters
- EZproxy stanzas reduced from 260 to 95 (63% ↓)
- EZproxy config file reduced by 700 lines (24% ↓)
- All 22 EBSCOhost collections had major issues
The EBSCO Saga

• Late 2017 moved EBSCOhost from EZproxy to SSO
• Students no longer needed to login again to access personalised EBSCO account
EBSCO link parameters and off-campus users

EBSCOhost link generated by Alma:
https://search.ebscohost.com/login.aspx?direct=true&scope=site&db=bsu&AN=95750557&msid=201334637&IdpId=

Link that correctly redirects to CQU login page:
type=sso&custid=s3716178&AN=95750557&msid=201334637&IdpId=
EBSCOhost parsers in Alma

- authtype=cookie,ip,shib for all 22 EBSCOhost collections
- Needed authtype=sso
- authtype parser parameter not configurable - opened salesforce case to make it configurable
Static URLs for EBSCO

• 140 standalone EBSCOhost portfolios without authtype and customer ID parameters
• Had to be manually edited to add ‘&authtype=sso&custid=s3716178’ to each Static URL
EBSCO Link Resolver Plugin

- 14 EBSCOhost collections with EBSCO Link Resolver Plugin enabled
- Uses EBSCO API to retrieve more accurate links with ID numbers instead of OpenURL
- Example with ‘AN’ ID:
- Links more accurate than OpenURL, but missing CQU parameters - authtype and custid
EBSCO Link Resolver Plugin

- Link resolver plugin integration profile:
  - Contains CQU API User ID, but no username/password to access CQU account
  - Alma uses generic API so URLs are returned without institution-specific parameters
  - Ex Libris would not fix this for CQU - recommended Ideas Exchange
EBSCO Link Resolver

- When EBSCO Link Resolver Plugin is not enabled, OpenURL is used:

- EBSCO Link Resolver does not work without volume and issue numbers
- EBSCO has no plans to fix this, only offers workarounds
Dynamic URL

- EBSCO’s workaround to the parser parameters and vol/issue problem: Dynamic URL
- Option in the Electronic Service
Dynamic URL

IF(rft.atitle)
https://search.ebscohost.com/login.aspx?authtype%3Dsso%26custid%3Ds3716178%26profile%3Dehost%26groupid%3Dmain%26direct%3Dtrue%26db%3Dbsu%26site%3DDehost-live%26bquery%3D(SO+URLENCODE({rft.jtitle}))+AND+(DT+{rft.year})+AND+(TI+URLENCODE({rft.atitle}))%26from%3Dprimo

IF(rft.pubdate,rft.btitle)
https://search.ebscohost.com/login.aspx?authtype%3Dsso%26custid%3Ds3716178%26profile%3Dehost%26groupid%3Dmain%26direct%3Dtrue%26db%3Dbsu%26site%3DDehost-live%26bquery%3D(DT+{rft.pubdate})+AND+(TI+URLENCODE({rft.btitle}))%26from%3Dprimo

IF(rft.btitle)
https://search.ebscohost.com/login.aspx?authtype%3Dsso%26custid%3Ds3716178%26profile%3Dehost%26groupid%3Dmain%26direct%3Dtrue%26db%3Dbsu%26site%3DDehost-live%26bquery%3D(TI+URLENCODE({rft.btitle}))%26from%3Dprimo

IF()
https://search.ebscohost.com/login.aspx?authtype%3Dsso%26custid%3Ds3716178%26profile%3Dehost%26groupid%3Dmain%26direct%3Dtrue%26db%3Dbsu%26site%3DDehost-live%26bquery%3D(SO+URLENCODE({rft.jtitle}))%26from%3Dprimo
Dynamic URL

Article URL:


Creates search in EBSCOhost:

(SO Academy of Management perspectives.) AND (DT 2011) AND (TI Two Decades of Russian Business and Management Research: An Institutional Theory Perspective)
Dynamic URL problems

- `rft.pubdate` comes from 264c field and might include extra characters - [2011] or ©2011
- `URLENCODE` function full of bugs
  - diacritics
  - `&` not encoded
  - curly quotations, hyphen and en dash not handled
  - too many brackets breaks it
- No access to `jkey` parameter
  - big problem for regional newspapers where a keyword search doesn’t work: (SO Central Coast (Wyong,(NewSouthWales,Australia)))
Surprise!

- Recently discovered change to parser behaviour in EBSCOhost Newspaper Source Plus
- Using Dynamic URL for articles
- Still using parser for journal titles - accessing jkey
- Good in theory except for URLENCODE bugs
Solutions for EBSCO?

- Go back to EZproxy
- Implement OpenAthens
- Unsubscribe to all EBSCO databases
- Do nothing (keep current FAQ workaround)
- Turn off the EBSCO Link Resolver Plugin in Alma and implement 'Dynamic URLs' after URL ENCODE bugs are fixed
- Once URL ENCODE bugs are fixed, ask Ex Libris to use Dynamic URLs for articles in all collections
‘No full text available’ error in Primo

- Incorrect metadata in Primo Central Index (PCI)
- Incorrect coverage dates or volume/issue numbers in Alma
- Incorrect metadata in the target database
- Insufficient metadata in a PCI record
- Incorrect availability
- Primo ‘View It’ links querying on only one ISBN
Only one ISBN used for matching

The PNX record has:
<addata>
  <isbn>9780729585569</isbn>
  <isbn>9780729541107</isbn>
  <isbn>9781336243958</isbn>
</addata>

The Alma bib record that it should match to has:
020 __ |a 9780729581103 |c 720.00 (3U)
020 __ |a 9780729541107

9780729541107 is the matching ISBN which gives the Primo record the status of ‘Full Text Available’
Accessing debug code

-> Right click on ‘No full text available’ box
-> Click ‘View frame source’
Debug code

<-- DEBUG:


END DEBUG-->

- Primo only takes the first ISBN (&rft.isbn=9780729585569) and can’t find it in Alma, so it shows ‘No full text available’
- ISBN 9780729541107 would have matched if added to the query URL
- Ex Libris Salesforce case status: Pending Development
Conclusion

• Primo linking issues demystified
• Educated library staff about linking issues
• Resolved many issues:
  – Alma electronic service configuration corrected
  – EZproxy added to Primo BO for Primo links
  – EZproxy configuration fully updated
• Still working to resolve some issues:
  – EBSCO a work in progress with FAQ workaround
  – Working with EBSCO and Ex Libris on unresolved issues
Thank you!

Feel free to email me for more information –

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