



Making OER Content Discoverable in Primo

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Learning Outcomes

1

Describe what
Open
Educational
Resources
(OER) are

2


Identify and
evaluate OER in
Alma and Primo

3

Increase
discoverability
of OER in Primo

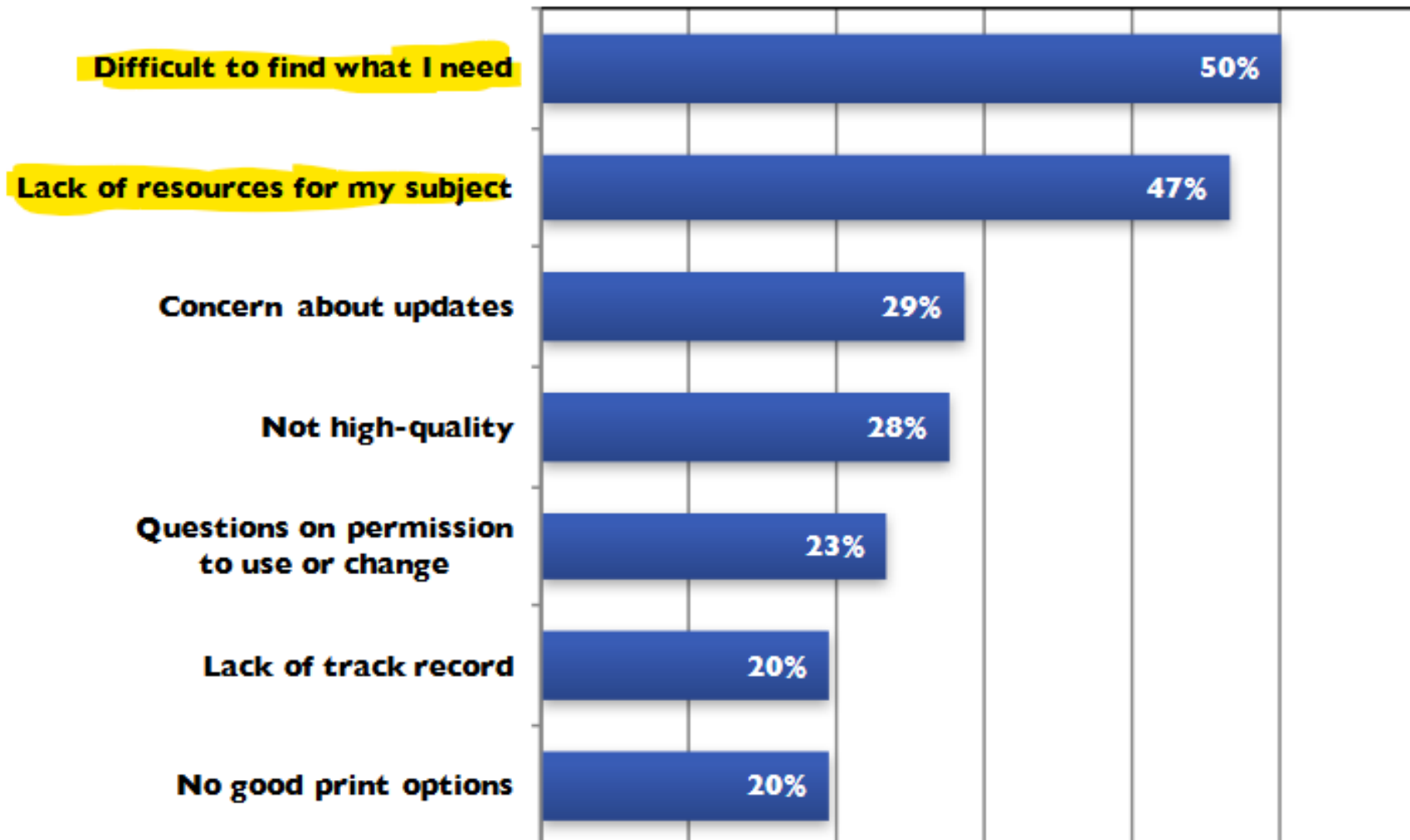


Is there an active OER initiative on
your campus?



Open Educational Resources (OER)
are teaching and learning
materials that you may freely use
and reuse at no cost, and without
needing to ask permission

BARRIERS TO ADOPTION OF OER - 2016-17



How can libraries help?

- ▶ Activate OER in Alma and PCI so that it shows up in searches
- ▶ Use other Primo functionality to boost discoverability of OER

Benefits of adding OER to Alma/Primo?

- ▶ Might help students who don't have a textbook
- ▶ Might help faculty who are looking for OER
- ▶ Allows for other functionality: easily adding OER to Alma Course Reading Lists, sharing a "Library Catalog" link with faculty
- ▶ Sends a message. In the library collection (catalog) = safe for students to use, potentially more accepted by faculty

Alma Activation vs. PCI

Alma

- ▶ Title-level indexing
- ▶ For selective packages- you can choose which titles to activate
- ▶ Takes 10 to 30 minutes to show up in Primo*

Primo Central Index

- ▶ Chapter, article-level indexing
- ▶ Activate either the entire collection or none at all
- ▶ Takes a week to 10 days to show up in Primo

*See this FAQ for more info: <http://slcnyc.libanswers.com/faq/273037>

OER Activation in Alma workflow

1. Identify OER (outside of Alma)
2. Locate OER (electronic collection) in Alma
3. Evaluate collection for relevancy, quality
4. Activate
5. Test links
6. Make available

OER Activation in PCI

1. Identify OER (outside of PCI)
2. Locate relevant collection in PCI
3. Activate
4. Test links
5. Evaluate collection for relevancy, quality

Activating OER in Alma

OER Activation in Alma workflow


1. Identify OER (outside of Alma)
2. Locate OER (electronic collection) in Alma
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Identifying OER in Alma and Primo

- ▶ Alma Community Zone = not ideal for OER "discovery"
- ▶ Better to find OER "in the wild" and then search for them in Alma
- ▶ Great starting point:
<https://oasis.geneseo.edu/index.php>

Test Case: Open Textbook Library

- ▶ <https://open.umn.edu/opentextbooks>
- ▶ Search in Alma for an Electronic Collection in the Community Zone

1  **Open Textbook Catalog**

Type: Selective package

Service: Full Text

Interface name: University of Minnesota

Linking Level: Book

Creation Date: 12/06/2017 05:21:08 EST

Modification Date: 12/08/2019 15:58:21 EST

Portfolio List (648)

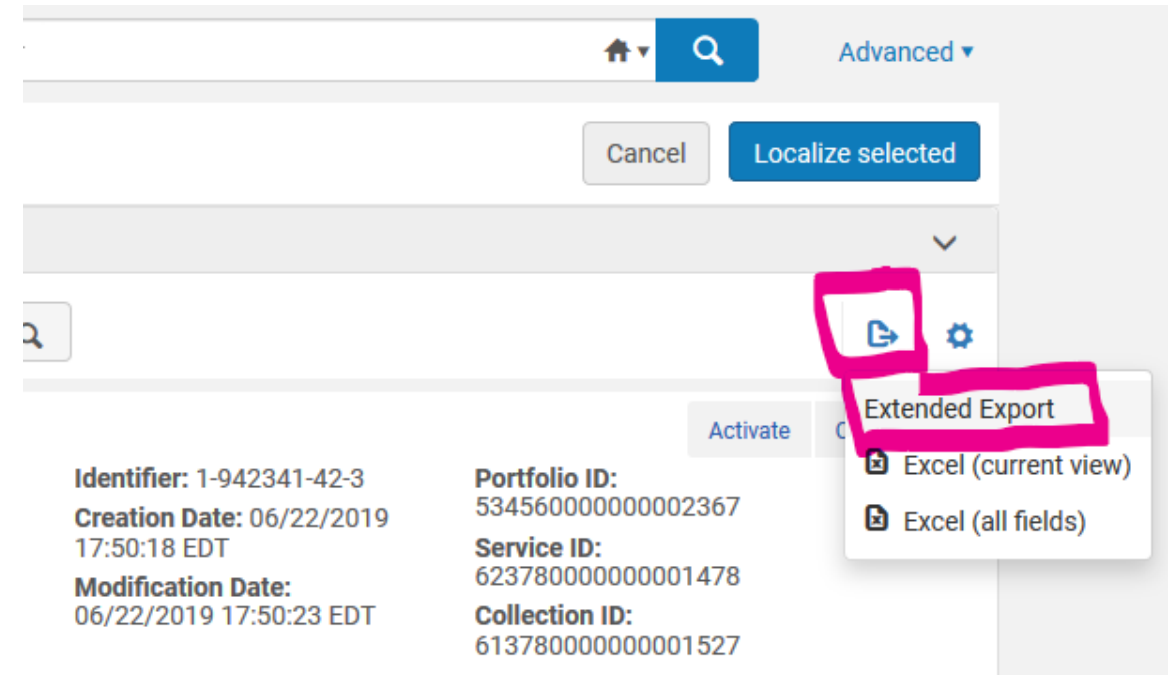
Activate



Collection ID:
613790000000001601

Evaluating OER collections in Alma

- ▶ Evaluate like you would any other electronic collection:
 - ▶ Relevant subject area
 - ▶ Current/ dated
 - ▶ Size of the collection – too much might overwhelm users
- ▶ Extended Export (from the Portfolio list) gives you a spreadsheet with good data for analysis
- ▶ Portfolio List - > Extended Export



The screenshot shows the Alma interface with a search bar at the top right containing a magnifying glass icon and the text "Advanced". Below the search bar are two buttons: "Cancel" and "Localize selected". A dropdown menu is open, showing a search icon and a gear icon. The "Extended Export" option is highlighted with a pink box, and a sub-menu is open below it, showing two options: "Excel (current view)" and "Excel (all fields)".

Identifier: 1-942341-42-3
Creation Date: 06/22/2019 17:50:18 EDT
Modification Date: 06/22/2019 17:50:23 EDT

Portfolio ID: 534560000000002367
Service ID: 623780000000001478
Collection ID: 613780000000001527

Using Extended Export to Evaluate an OER Collection

M: Title - Is this subject area relevant to your users?

Highlight this column and click Wrap Text

Use Filtering to make the next ones easier

BE: Publisher – Are you familiar with the publisher?

BG: Date of Publication – How current is the content?

BN: Material Type – Is it what it says it is?

CT: Language – Look out for anything outside the needs of your users

A few tips for activating OER in Alma:

- ▶ No proxy is needed
- ▶ Remember to test access and display in Primo

< Activation Wizard: Linking Information

Open Textbook Catalog

Type	Selective package
Number of portfolios	648
Electronic Collection Level URL	-
Additional descriptive information	Open Textbook Catalog

Full Text Service - Proxy setup

Proxy enabled No Yes

Mark Bib as suppressed
Electronic Collection Proxy Enabled No Yes

Central Discovery Index information

Full Text Service

Activate this electronic collection service
Make service available
Automatically activate new portfolios

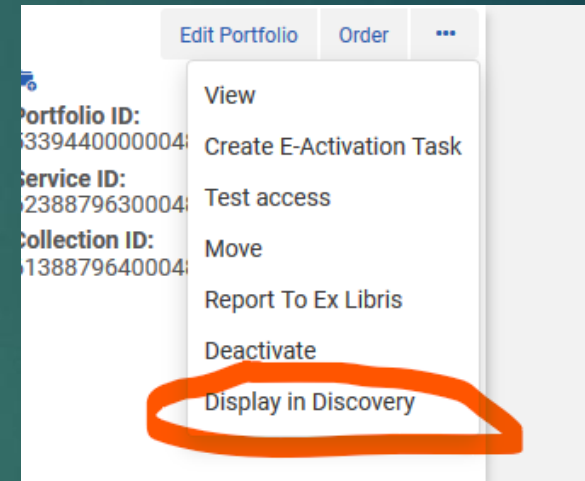
Testing Access

▶ Do the links resolve correctly? Test a few at random.

▶ Portfolio List -> Display in Discovery

▶ Search by titles in Primo

▶ When you're done, remember to make the full text service available (Edit Service -> Activation -> Service Activation Status change to "Available")

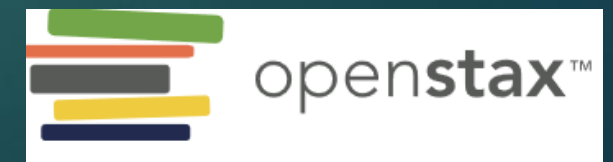




I don't have time for all of that...

OER you can activate right now

- ▶ Open Textbook Catalog
[613790000000001601]
- ▶ Openstax College [613790000000001608]
- ▶ Open SUNY Textbooks [613780000000001527]



For these collections, search by Electronic Collection PID = #####

More OER

- ▶ TED Talks [6115470000003244] - ~1500 TED talks (not in PCI as far as I can tell)
- ▶ Chronicling America: Historic American Newspapers [61100000000002508] - ~800 historic early 20th century newspapers, hosted by the Library of Congress (in PCI but part of a collection of 285,351 records)



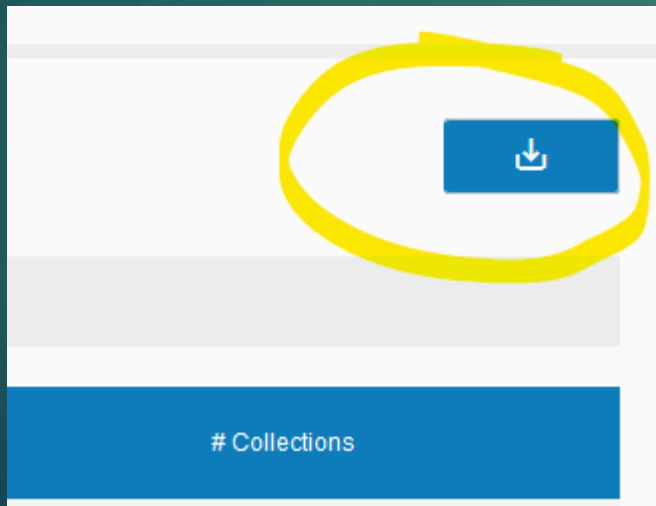
Activating in PCI

Activating in PCI

- ▶ Congratulations! All freely available content was automatically activated by Ex Libris when we migrated. So if you have not deactivated anything, then, you don't need to activate any of these collections.
- ▶ However, this is a great opportunity to **de-activate** any freely available collections in PCI that don't meet the needs of your users. For example:
 - ▶ Foreign language collections
 - ▶ Huge collections that will overwhelm your users (DOAJ, maybe?)

How to see what freely available content is activated in PCI:

- ▶ In the PCI, on the left, click the facets “Active for Search” and “Open Access”
- ▶ If you want to export your activated collections to Excel, click on the “download” icon:



Institution: SUNY Potsdam

Collections Filter

Activation status ^

Active for Search

Inactive for Search

Full text rights ^

Open Access

Subscription (Collection level)

Subscription (Linkresolver)

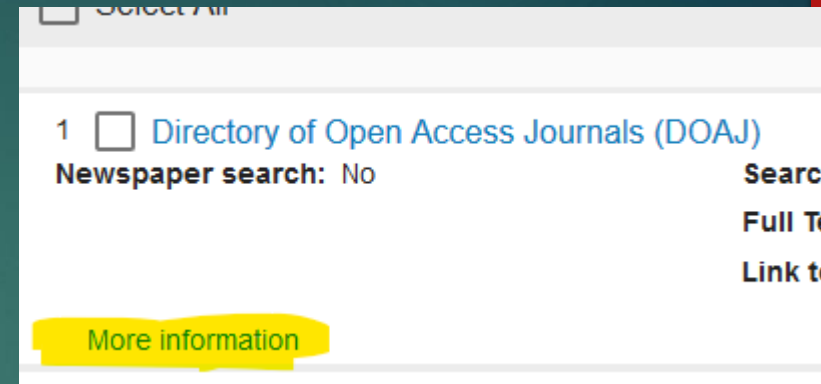
Primo Central Collection Activation

Inherit Consortium Central Office reso

Provider Name Filter

Provider's Name	
1	1science
2	ABC-CLIO

Number of records in a collection in PCI:



1 [Directory of Open Access Journals \(DOAJ\)](#)

Newspaper search: No Search: Free Active for Search

Full Text: Open Access

Link to Full Text: Link in record

[More information](#)

Central Update Frequency: Weekly

Resource Types: Articles, Reviews, Video **# Item Indexed:** 4319536

Last Activated On: 03/04/2018 3:42 PM (UTC) **Added On:** 14/12/2019 8:47 AM (UTC)

Local Note: Add Note

Description: The Directory of Open Access Journals (DOAJ) is a community-curated online directory that indexes and provides access to open access, peer-reviewed, scientific and scholarly journals, covering a wide range of subjects and written in many languages. For more information: <https://doaj.org/>

The availability status for all records in this collection is set to "Full text available".

Evaluating free content in PCI

- ▶ The spreadsheet you export from PCI will include data such as the provider name and database name, a description, etc. **It will not include record count, or language.**
- ▶ The PCI Collections list includes all available collections, and includes record counts:
https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Product_Documentation/Primo_Central/Primo_Central_Indexing#Primo_Central_Collections_List
- ▶ But don't overthink this! Too much content can be overwhelming to certain users (basically everyone but super users)

OER you can activate in the PCI

Provider	Database
OpenStax	OpenStax Digital Textbooks
State University of New York (SUNY)	Open SUNY Textbooks
UMN Center for Open Education	Open Textbook Library

For more collections, see: <https://slcny.libanswers.com/faq/232596>

Tips for evaluating PCI Collections

- ▶ Find all records in a specific PCI collection ([https://knowledge.exlibrisgroup.com/Primo/Community_Knowledge/How_to_find_Primo_Central_Index_\(PCI\)_records_in_Primo](https://knowledge.exlibrisgroup.com/Primo/Community_Knowledge/How_to_find_Primo_Central_Index_(PCI)_records_in_Primo))
 - ▶ Start with a known item search
 - ▶ Navigate to full record - > add “&showPnx=true” to the end of the URL
 - ▶ Note the “sourceid” (near the top of the record, or Ctrl+f to find it)
 - ▶ Conduct a search in Primo for “sourceid*”
 - ▶ Scroll to Collection facet and filter to include the collection you’re searching for
 - ▶ Be sure to select “Expand my results” to see all records

https://search.lib.buffalo.edu/discovery/search?query=any,contains,chemistry&tab=EverythingUBSUNY&search_scope=UBSUNY&vid=01SUNY_BUF:everything&mfacet=tlevel,include,open_access,1&lang=en&offset=0

```
<?xml version="1.0" encoding="UTF-8"?>
<record xmlns="http://www.exlibrisgroup.com/xsd/primo/primo_nm_bib">
  <control>
    <sourcerecordid>978-0-387-40054-9_128390_Chap5</sourcerecordid>
    <sourceid>springer_s</sourceid>
    <recordid>springer_s978-0-387-40054-9_128390_Chap5</recordid>
    <sourcesystem>Other</sourcesystem>
    <dbid>-7M</dbid>
    <dbid>-7P</dbid>
    <dbid>-BG</dbid>
    <dbid>0DA</dbid>
```

springer_s*

All items ▼ that contain my query words ▼ anywhere in the record ▼

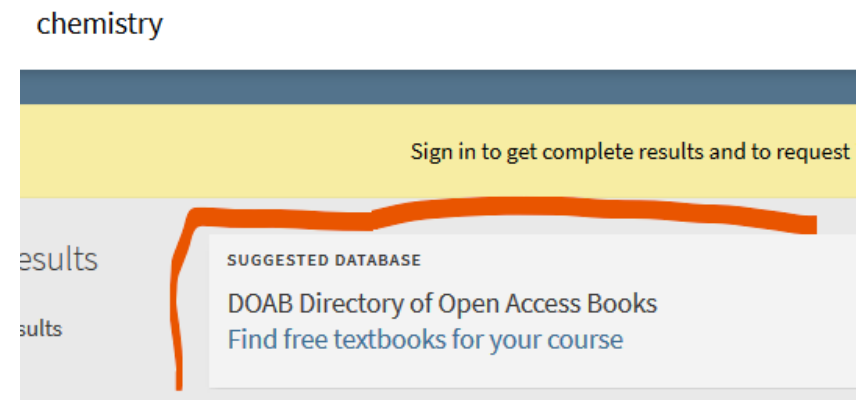
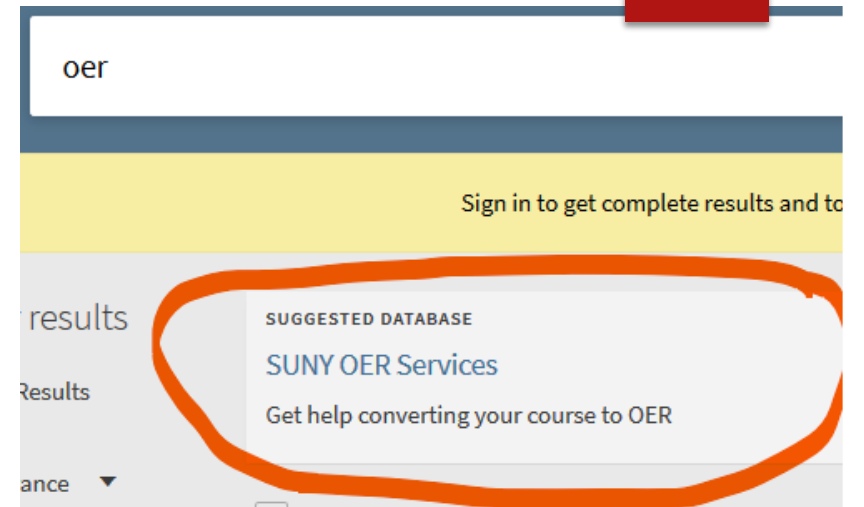
Sign in to get complete results and to request items

0 selected PAGE 1 837,892 Results

Other Strategies

Resource Recommender

- ▶ Useful for OER collections and content that aren't in Alma or PCI.
- ▶ Boost your OER of choice
- ▶ Promote library OER page
- ▶ Highlight textbooks for common introductory courses on your campus
- ▶ Promote OER Librarian



Configuring Resource Recommender

- ▶ Ex Libris Documentation:
https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/050Other_Configuration/010Resource_Recommender_for_Primo_VE
- ▶ Configuration Menu > Discovery > Other > Resource Recommender Configuration)
- ▶ Specify link, link text, description, tags
- ▶ Different types of recommendations:
 - ▶ Library Guide: fields above
 - ▶ Website: fields above, plus image
 - ▶ Person: email, email text, image
 - ▶ https://suny-esc-psb.primo.exlibrisgroup.com/discovery/search?vid=01SUNY_ESC:01SUNY_ESC&lang=en&query=Keyword,contains,oer

Tips for creating and tagging recommended resources

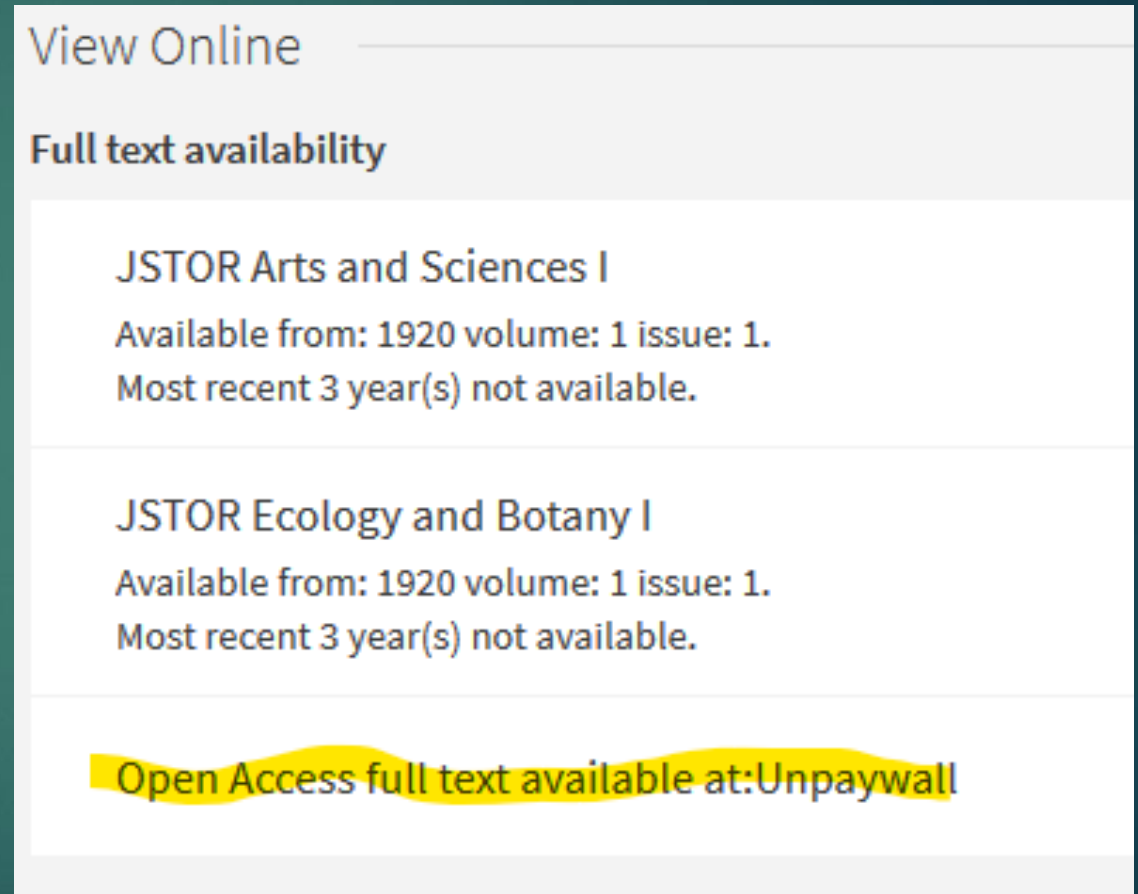
- ▶ Think of links and tags relevant to your users (faculty and students)
- ▶ Fewer, more targeted links rather than lots of general links that include the same tags
- ▶ Review Primo usage reports to see what terms your users are searching and use this data to inform your resource recommendations (more info: <http://slcny.libanswers.com/faq/273293>)

A few resource recommender + tags suggestions:

Resource	Link	Link text	Tags
OASIS	http://oasis.geneseo.edu/	Discover OER for your course	Oer; free textbooks
SUNY OER Services	https://oer.suny.edu/	Get help converting your course to OER	Oer;
Your library guide about OER	[campus-specific]	Learn more about OER	Oer; what are oer;
Your campus OER contact	[their email]	Contact me to learn more about OER	Oer; [person's name]

Unpaywall link resolver integration

- ▶ This link resolver integration will improve linking to freely accessible journal content, in Primo.
- ▶ Info on how to activate here:
<https://slcny.libanswers.com/faq/275018>



View Online

Full text availability

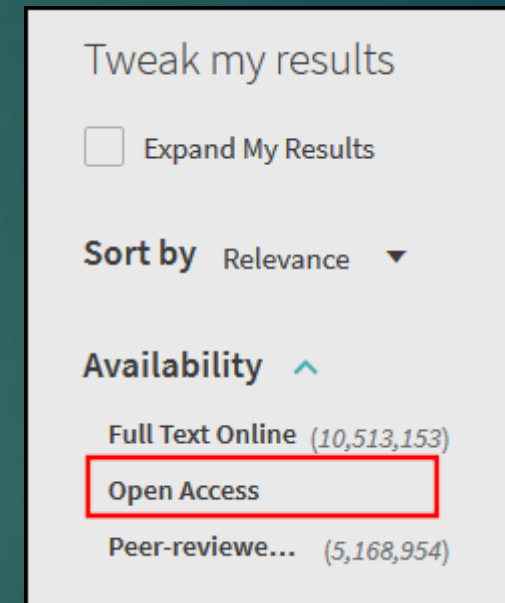
JSTOR Arts and Sciences I
Available from: 1920 volume: 1 issue: 1.
Most recent 3 year(s) not available.

JSTOR Ecology and Botany I
Available from: 1920 volume: 1 issue: 1.
Most recent 3 year(s) not available.

Open Access full text available at:Unpaywall

Open Access Indicator in Primo

- ▶ OA indicator for PCI records that are:
 - ▶ Freely available and openly accessible without requiring authentication by the user.
 - ▶ Identified by the provider/publisher as Open Access.
 - ▶ Residing in a known Open Access repository, database, or journal collection that Ex Libris determines to be Open Access.
- ▶ OA in Community Zone records: Journals*, based on Ulrich's data (506 0_ \$f Unrestricted online access \$2 star)

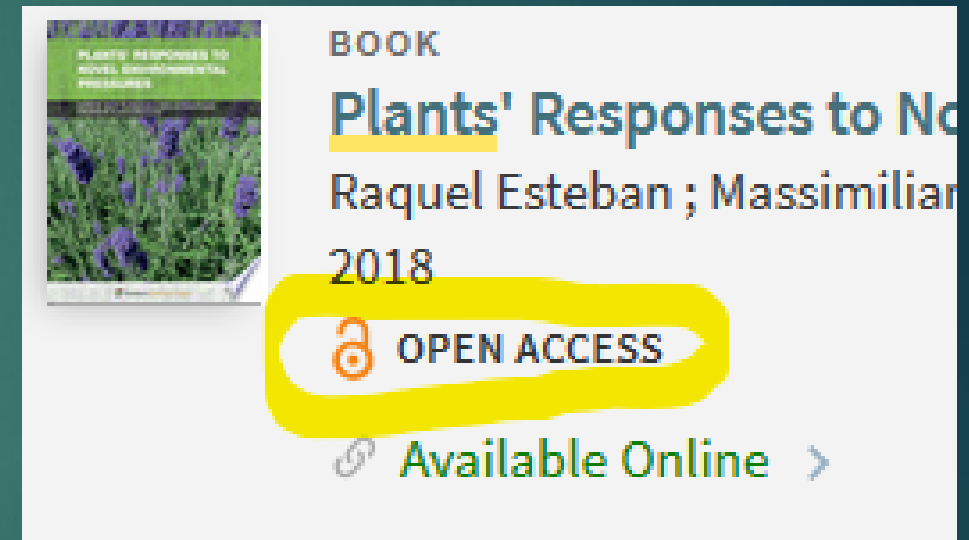


*According to Ex Libris documentation:

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/008Primo_VE_User_Interface/Open_Access_Indication_in_Primo_VE

Open Access Indicator in local records

- ▶ To add OA Indicator to local MARC records: Add the following MARC: 506 0_ \$f Unrestricted online access \$2 star
- ▶ To add OA Indicator to local Dublin Core records: dcterms.accessRights parameter should contain the value “Unrestricted online access”



Actions you can take right now to improve OER discoverability:

- ▶ Activate the relevant OER in Alma and or Primo
- ▶ Create Resource Recommender examples
- ▶ Activate Unpaywall integration
(<https://slcny.libanswers.com/faq/275018>)

Further reading:

- ▶ SUNY OER Services Community Courses – Asynchronous learning opportunities open to anyone in SUNY
<https://innovate.suny.edu/sunyoercommunitycourse/>
- ▶ SPARC Open Education – A good overview of issues surrounding open educational resources and open pedagogy
<https://sparcopen.org/open-education/>

Questions?

Discussion

- ▶ Have you found a great OER collection in PCI or Alma?
- ▶ What have you done (or plan to do) to improve discoverability of OER at your campus?