



ERM-202: Troubleshoot Discovery

Exercises for Attendees

Note: This exercise does *not* need to be practiced in your sandbox; you can use your production environment. Also: The exercise works equally well in Summon and Primo VE.

Exercise: Troubleshoot Real Discovery Problems

1. Find some patron- and staff-reported discovery problems. Ask around to your library colleagues, or collect some reports that have been sent from patrons letting you know about discovery issues.
2. Try to determine the cause of the discovery issues, using the workflows you saw during the session, and based on the symptoms of the problem in your discovery service:
 - a. E-resource doesn't show up at all:
 - i. Check for the resource on the vendor site (access provider)
 - ii. Check if the resource exists in the Community Zone (CZ)
 - iii. Check if the resource is activated your Institution Zone (IZ)
 - iv. For serials, check if the coverage (dates for availability and embargoes in your IZ portfolios) include the resource.
 - b. E-resource link is broken
 - i. Check if the resource's collection only has journal-level or title-level linking
 - ii. Check if the resource's parser parameters (etc) are correct
 - iii. See documentation for other things to check:
 1. [What Are the Common Causes of Full Text Linking Problems, and How Can Linking Be Improved?](#)
 2. [How To Report Full Text Linking and Availability Problems to Support](#)
 - c. E-resource requires a login at vendor's site
 - i. Check if the resource's service or portfolio has proxy set correctly

Good luck, and let us know next week how these suggestions work for you!