
Primo Central: Institutional Repository Program

Boost the visibility of your researchers' content by indexing your institutional repository in Summon and Primo Central. Institutional repository content will be loaded first in Summon and exported to Primo Central for ingestion. This means that all institutional repositories for Primo Central will be in Summon as well.

Note

If you are a current Summon client and would like to see your institutional repository available in Primo Central as well, please submit the request to export to Primo Central via the Support Portal (available from the **More Sites** menu above).

Requirements

Before submitting, please make sure your repository meets the following requirements:

- Metadata should be uniform and preferably follow the [Dublin Core format](#).
- Collections must be either entirely Open Access or the following:
 - Metadata must include clear, consistent Open Access indicators.
 - Where unrestricted content is available, each record must contain a link to that content. If a record is a citation or an abstract record, a link to the native interface should be present.

To be loaded, records must contain the following:

- Unique Record Identifier
- Title
- Type (for example: book, article, image, and so forth) – If the entire repository is composed of the same type of records, then tagging can be accepted at the collection level.
- URL
 - Direct link to content or the content landing page
 - Link to the native interface for citation or abstract records

Harvesting Your Repository

To have your repository harvested, please submit a case using the Support Portal (available from the **More Sites** menu above) with the following options selected:

- **Subject:** Institutional Repositories (IR)
- For the **Title**, enter one of the following:

- New IR -- [name of the repository] -- OAI-PMH (if the IR supports OAI-PMH)
- New IR -- [name of the repository] -- FTP (if the IR does not support OAI-PMH)
- Include the following information in the **Description** text box:
 - URL for the OAI-PMH access point
 - If the repository does not support the OAI-PMH protocol, then you will need to manually upload your files via FTP.
 - Optional OAI-PMH instructions (such as separate by sets, ignore certain sets, or include all sets)
 - Estimated total number of records in the repository
 - Estimated percentage of open access records in the repository (if not the complete collection)
 - Open Access indicator value and field/tag
 - Only needed if some items are not Open Access
 - Delete records indicator
 - Point of contact
 - Brief summary/description of the content

FAQs

1. I am a Summon customer but would like my repository indexed in Primo Central for discovery as well. Is this possible?

Yes, we can index in both places but content must meet requirements for Primo Central. For more information on the requirements for Summon Institutional Repositories, please see [Getting Local Collections Loaded into the Summon Index](#).

2. My repository is 80% Open Access. Can the 80% be included in Primo Central?

Yes. If the metadata includes an Open Access tag, then it is possible to ingest only the records which contain specific values in the Open Access tag. This is on condition that at least 80% of the records are Open Access. If the content is using the Dublin Core schema, the value in the <dc:rights> field is clearly identified as "OpenAccess", "Freely Available", etc. For example: <dc:rights>openAccess</dc:rights>.

3. Does the actual content have to be available online to qualify as Open Access?

Yes.

4. Can the links to the content lead to a 3rd party website?

Yes, but only if the content is freely available from that site. They cannot lead to a pay-wall or registration form.

5. Our metadata does not contain Open Access tags, nor can I provide alternative specifications. What can we do so that our Institutional Repository can be included in Primo Central?

Your data team may be able to add the necessary tags, or create a set of exclusively Open Access materials. For example, for some Institutional Repositories, Open Access content is listed within a different set.

6. Do you include content which is "Free to Read" but is not for redistribution?

Yes.

7. My Institutional Repository is fully Open Access, but a small percentage (<5%) of the materials are embargoed for a limited period of time and cannot be isolated from the general collection. What happens?

In these rare cases, the entire collection will be included as Open Access, but we will include a disclaimer in the description—for example, **A small number of records may be embargoed at any given time.**

- This solution will only be applied when less than 5% of the records are embargoed and no other solutions are available.
- This solution will only be used with the Content Manager's approval and with the caveat that this sometimes leads to poor user experience.

8. Why are the Open Access standards so rigid?

If an Open Access collection includes records which are not freely available then it leads to a poor user experience. Our aim is to promote Institutional Repository content that is freely available.

9. I previously registered and the information that I provided has changed. Should I register again?

No, please submit a request via the Support Portal to update the information. If the initial case is still open, please respond to the open case.

10. What information should be included in the Institutional Repository's Description?

The description serves to tell users what they can expect to find in your repository. It is helpful to include any of the following applicable information:

- Repository name
- Institution name
- Who contributes to the repository (e.g. undergraduates, doctoral students, administrative staff, researchers, etc.)
- Types of materials in the repository (e.g. student papers, images, conference proceedings, historical documents, etc.)
- Subject specialties
- Location for further information

11. Whose name should be included in the point of contact details?

Please include the name and email address of the Repository Manager.

12. Why and how do I need to provide the OAI base URL?

The base URL serves as the basis for listing the sets and the automated validation process. Truncate the URL before the "?" for example: <http://repositorio.cepal.org/oai/request>.

Prior to submitting your request for inclusion, please verify that the server is up and that the URL resolves properly – otherwise we will not be able to harvest any content.

13. How often will Institutional Repository collections be harvested and records added/updated?

Unless otherwise requested, once a collection is loaded into Primo Central, updates are harvested via Summon on a weekly basis as long as content is available for harvest.

14. Is the Institutional Repository initiative limited to Ex Libris customers?

No. We harvest content from any and all Institutional Repositories that meet the Open Access and metadata criteria, with the goal of increasing the quantity and discoverability of Open Access material in the indexes and thereby supporting the Open Access movement.

15. As a Primo Customer we already harvest our own Institutional Repository records into our own Primo system. Are we going to end up with duplicate records (local records and Primo Central records) if we add our Institutional Repository content to the Primo Central Index?

If you already harvest your own Institutional Repository and you want to use your own normalization rules, then to avoid duplication at a local level, we recommend that you not activate your own collections in the Primo Central Index. The goal of indexing your repository in Primo Central is to make your local materials available to researchers on a global scale.

Basic Fields for Institutional Repositories in Primo Central

Data Element	Requirement
Direct link to content or landing page	Mandatory
Open Access indicator – if not 100% at the collection level	Mandatory
Title, subtitle	Mandatory
Type of work (e.g. book, article, image) - if type is not indicated at the collection level	Mandatory
Unique record identifier	Mandatory
Abstract	Highly recommended
Author(s) / contributor(s) / editor(s) - full names where possible	Highly recommended
Date of publication	Highly recommended
Deletion indicator	Highly recommended
DOI	Highly recommended
ISSN / ISBN; eISSN / eISBN	Highly recommended

Data Element	Requirement
End page	Highly recommended
Full text indicator - if not 100% at the collection level	Highly recommended
Grant - sponsor or funder ID	Highly recommended
Grant information (name or title)	Highly recommended
Issue number	Highly recommended
Journal title	Highly recommended
Language of original article	Highly recommended
Research IDs – ORCID, Scopus ID, ISNI, arXivID, ResearcherID, eRA ID	Highly recommended
Researcher affiliation	Highly recommended
Researcher email	Highly recommended
Re-use license information	Highly recommended
Series name	Highly recommended
Start page	Highly recommended
Subjects / keywords	Highly recommended
Volume number	Highly recommended
Alternative title (e.g. alternate language title, parallel title)	Recommended

Data Element	Requirement
Thumbnail URI	Optional

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