Ensure Maximum Discoverability
of Gale Content in Ex Libris Primo®

The Gale resources your library subscribes to are discoverable and accessible through the Primo® discovery service. The action items below are required to activate these resources for discovery through its supporting Central Discovery Index (CDI), if your library uses either Alma or SFX.

- [Directing users to Gale content via Alma](#)
- [Activating content using CDI Search](#)
- [Directing users to Gale content via SFX](#)
- [Optimizing exposure and furthering use of your collections](#)
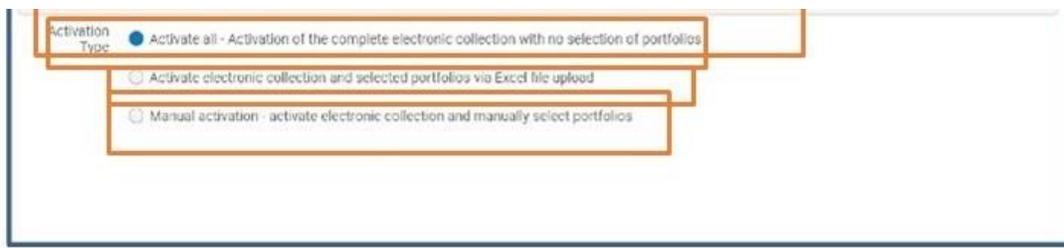- [Other helpful resources](#)

Directing users to Gale content via Alma

1. **Add your Gale resources to your Alma profile**

   Find your Gale resources with the Alma search box and add them to your profile. Activate the preferred collection using the [Electronic Activation Wizard](#). If you are unsure of what Gale products your library has access to, use the [Gale Direct URLs tool](#), or contact your [Gale Customer Success Manager](#).

2. **Select titles when you do not subscribe to the complete collection**

   If the Gale collection contains many titles but your library subscribes to a portion of the titles, select your titles so that Alma understands what content your users have available in full text. You can activate selected titles via an Excel file upload using the [Portfolio Loader](#) or through manual activation.

Citations from titles you do not subscribe to are still available to Alma users who select to expand their search beyond the library's full text holdings:

Tweak your results

☐ Expand My Results

When you subscribe to or purchase additional titles in a collection, be sure to update your Alma profile to reflect access to your new full text titles.

3. **Complete activation within Alma**

Once the steps in the activation wizard are completed, the task will now appear under the "Assign to Me" tab of the task list. From there, select "Test Access" and update the status to "Access Confirmed" and click "Save." Finally, click "Unsuppress" from the task list actions menu to make the collection level bibliographic record available for Discovery.

4. **Future Gale platform changes may sometimes require you to make an update to your Alma profile**

When Gale platform changes occur in the future, you may need to update your Alma profile. You can track these Gale changes in the CKB release notes.

- [Alma CKB Release Notes](): This page shows new [Alma Central Knowledgebase]() Releases.

5. **Configure SFX for your resources to link directly to full text.**
Customize your [Primo Template Mapping file]() with your Gale Location ID. This is necessary for correct linking to Gale content from Primo. To obtain your Location ID, contact your [Gale Customer Success Manager](). Also [configure the link resolver]() (using the information under the "Galegroup" section in the linked PDF).

See the Ex Libris articles below for instructions on how to set up your location ID/Loc_ID:

- Alma: [Gale newly activated database gives linking / OpenURL errors]()
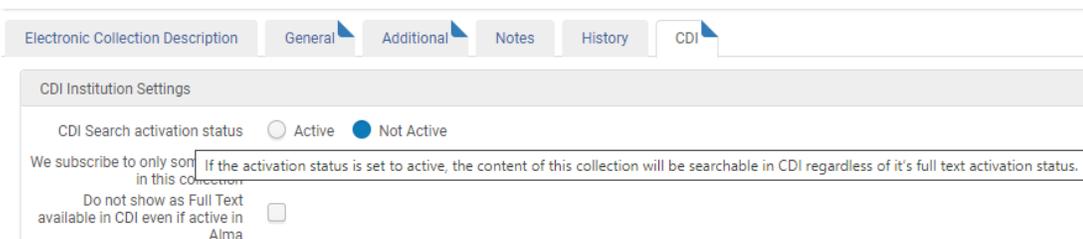- [SFX Target and Alma E-Collection Configuration Guide]() (in the linked PDF under the "Galegroup" section)

Activating content using CDI Search

1. **CDI Search activation status**

This setting controls which records will appear in the Primo "Expand" search. Set to "Active" to show records from the collection in the Discovery expand search. Records will be flagged as "No full text available" unless there are full text activations for the collection.

For full text activations, the indication "Full Text available" will be shown.

Alma collections that you have active, because you subscribe to their full text, will become automatically searchable in CDI. No separate search activations are necessary for those collections.

2. **CDI-only full text activation**

This setting controls which records will appear in the Primo "Expand" search. Set to "Active" to show records from Activate collection level records in CDI that use link in records, and the library can keep these activations separate from their local Primo index or in the link resolver. You can create groups in the CDI Group Settings section, and the "CDI-only full text activation" appears only in the individual groups and is hidden from the institution section.

Directing users to Gale content via SFX

1. **Activate content as "Available" and "Searchable" in SFX**

   Find your Gale resources within SFX and activate full text targets in order to mark them as full text available in discovery and to make the full text link available via the link resolver. Full text activated targets are automatically searchable in CDI by default. If you are unsure of what Gale products your library has access to, use the Gale Direct URLs tool, or contact your Gale Customer Success Manager.

   All targets that are marked with the "In CDI: Yes" status can be activated for search separately from the full text activation, so they will appear in the expanded search.

2. **Link and Search Targets**

   There are two types of targets in the KBManager Target list: SFX link targets and SFX search targets. Find your Gale resources within SFX and you may filter by "Link Targets", "Search Targets", or "Link and Search Targets" to display all targets of all types in the KB.

   The following target has active indicators for both full text and CDI searching:

3. **Link customization**

   Customize your Primo Template Mapping file with your Gale Location ID. This is necessary for correct linking to Gale content from Primo. To obtain your Location ID, contact your Gale Customer Success Manager.

   See the Ex Libris articles below for instructions on how to set up your location ID/Loc_ID:

   - SFX: Gale Target Gets OpenURL is Invalid Error
   - SFX Target and Alma E-Collection Configuration Guide (in the linked PDF under the "Galegroup" section)

Optimizing exposure and furthering use of your collections

Consider maximizing discovery of your Gale resources

For furthering one's research after a user has completed discovery in Primo, searching in a niche database, with its advanced search features, can be incredibly valuable. The Primo Resource Recommender feature provides your library the opportunity to make your Gale resources stand out as great places for deepening a user's research. Information in the given link will explain how to configure the Resource Recommender service.

Other helpful resources

- CDI Collection Lists for Alma Customers
- Documentation and Training for CDI

If you have additional questions, please Contact ProQuest Ex Libris support.

ExLibris Primo