
How to Address Indexing Issues in Alma and Primo VE

- **Product:** Alma, Primo VE
-

Question

What is "Indexing"?

Answer

In the simplest of terms, Indexing is the sorting of records, data, and values in a specific structure that allows that information to be used or retrieved at a later date.

Question

What are some Symptoms of an Indexing Issue?

Answer

For Alma, Indexing Issues might result in the following, but are not limited to:

- If a number of Portfolios were deleted from an Electronic Collection, the number of remaining Portfolios might be different than what that number is expected to be.
- If a Portfolio or Record was deleted, but can still be observed in the Alma UI.
- If a number of Portfolios were moved to another Electronic Collection, but the Portfolios are still seen in the old Electronic Collection.
- If changes were made to a large group of items (bibliographic records, portfolios, etc.), but the changes are not yet seen in the Alma UI.
- If changes in Availability for an Electronic Collection/Service were made, but the Alma UI does not reflect the changes made.
- If a change was made to a Bibliographic Record, but the relevant field has not yet appeared in Primo.

Question

Are there solutions that can be applied to address the issue without opening a Support Case?

Answer

Yes, you can index only a set of records without a support case.

Some solutions can cause Alma or Primo VE to re-evaluate the data and automatically re-index the data without having to open a Support Case or wait for the Semi-Annual Indexing Process.

Although both Alma and Primo VE have built-in functionality that attempts to detect and correct indexing issues passively, there are still sometimes issues with specific records. Here are some solutions that can be applied to cause indexing to occur for both products:

Processes that can Trigger Indexing in Alma:

1. Saving and Releasing the Bibliographic Record.
2. Saving a Portfolio in the Portfolio Editor, Electronic Collection in the Electronic Collection Editor, or Electronic Service in the Electronic Service Editor. No changes are necessary; re-saving them causes Alma to 'check' the data structure again, which can solve an indexing issue.
3. Creating a Set of affected members, and then running the "recalculate local resource type" job on that set.
4. Creating a Set of affected Bibliographic Records, and then applying a Normalization Rule on the set.

Example: add a local field and remove the field using the same rule. Please note that this rule will not work for CZ records.

Additional Information:

For more information on adding members to a set, please consult our Product Documentation on adding [Managing Search Queries and Sets](#).

For more information on the "recalculate local resource type" job, please consult our Product Documentation on running [Manual Jobs](#).

For more information on how to create and apply a normalization rule, please consult our Product documentation on [Working with Normalization Rules](#).

If you have tried the above steps and they did not work or have further questions about them, please open a Support Case with the relevant Support Team!

Note

Please note that certain indexing issues are time-sensitive and require the issue to be replicable and currently occurring in order to investigate the root cause.

While the Alma and Primo Support Teams will thoroughly investigate to resolve each reported indexing issue or identify the root cause, opening the case with the correct respective Support Team ensures that we can preserve the information necessary to investigate the root cause.

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