

20210610 Central Discovery Index

Debriefing session:

Cindy at NCC: do not show full text even though there is full text in Alma and ??? --is confusing, because they are using full text in a counter-intuitive way. Look at permalink -- if it has CDI in it, it's from the CDI. Go into collection and CDI: don't show as full text as available in CDI--don't show the citations.

Jessica has looked for info about enhancement -- then undo what you've done?

November: CDI results including a one-click link to pdf/html for some vendors.

December: show both "link in record" and "linkresolver links" if available for a citation.

Here is some text from the [Primo 2021 Roadmap](#): Exclude ebooks from CDI upon Duplications - What's Coming: Allow the combination of local ebook bib records from Alma with book chapters from CDI in the search results. Highlights: Option to define which collections to exclude the retrieval of ebooks from CDI. Release planned: H2 2021

https://knowledge.exlibrisgroup.com/Primo/Product_Materials/Roadmap

Basically, it's a good question for you to post to Alma-L, see what other libraries have learned.

Cynthia from GSU -- have ebooks that are both in EBSCO and another package -- how can you tell which are active? Do you leave duplicates in? No efficient way to do that. EBSCO does not directly feed into CDI. You can look for EBSCO in EBSCO API. CDI indexes some EBSCO resources in CDI though. If you do the full package, you can end up with duplicates. You are relying on the collection to be up to date. Selective setting -- better to have selective yes. Easy to not notice that one duplicate goes away and you need to turn the other one on. Need to do a lot of checking. Will it notify you that you have it in the other one? No efficient way to do this--need to check it (or at least a sample) from time to time. For CDI, in the CDI tab, leave selective as yes. Will check that there is an active portfolio. Different from full text service level. CDI and collection aren't completely in sync.

From Lori Thompson to Everyone: 11:18 AM

We are all EasyActive, correct?

I-Share is Easy Active.

From Liz Hollendonner (she/her) to Everyone: 11:18 AM

Is there any regular maintenance that needs to be done with CDI in either Alma or PrimoVE?

Spot checking if patrons have issues. Once or twice a year, check that all your library's acquisitions are active.

From Cynthia Scott to Everyone: 11:40 AM

So keep the CDI as yes even when it is an aggregator package?

I should clarify - keep we only subscribe to some of the portfolios in this collection.

Yes. Won't affect whether new portfolios activated but will cut down on the number of dead end citations.

How are users adjusting to using the CDI? Cynthia from GSU--our users are loving it. Cynthia Scott -
- Our users have been quiet....

How have users in institutions that have used other discovery services found the transition? No response

What would make CDI better for you or your patrons? Cynthia from GSU--standardizing the interface. Need to know type of link in drilling down. Searching in Alma CZ. Are you trying to search if there are results in Primo VE. Need ecollection package code. Checking if a collection is providing a citation: ExL CDI Tips and Tricks:

[https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_\(English\)/CDI_-_The_Central_Discovery_Index/090CDI_Tips_and_Tricks](https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_(English)/CDI_-_The_Central_Discovery_Index/090CDI_Tips_and_Tricks)

CDI Collection list has a spreadsheet that lists CDI collections. Also have a list on the web page.

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/050CDI_Collection_Lists_for_Alma_Customers#CDI_Collection_List](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/050CDI_Collection_Lists_for_Alma_Customers#CDI_Collection_List)

Jessica: if you are frustrated by CDI, you are not alone!

Denise: had to sort out what is coming from the NZ vs. your IZ vs. what Ex Libris is harvesting. Idea Exchange to exclude items from CDI, but Ex Libris said was not possible at this item.

Lori: How would you find CDI institution settings: yes or no? Can you do that with an advanced search. Denise needs to get back to you.

Advanced search: Collection equals Gale and CDI search equals free.

CDI has around 5 billion e-resource citations. Mostly, you are able to see the citations even though you don't have access to the article. In Alma lingo= search rights usually free, full text can be free or subscription.

Content loaded into CDI-->Patrons search Primo VE --> Receive results --> Access full text. Expand search results to see citations for items to which you don't have online access.

Activation status- tied to active in Alma IZ or NZ (or not)

I-Share is Easy active CDI from beginning of our Alma/PrimoVE.

Holdings are published and CDI is matched to it. Run daily in I-Share for each IZ and NZ a few minutes after midnight. (Can take up to 72 hours to be visible in PrimoVE.)

CDI settings:

1. Is e-collection & portfolio active or not-
2. For e-collection: Do not show in CDI (even if Alma e-collection active). Makes no citations fed into CDI but allows linking to Full Text via link resolver/link in record. Does still allow bibs in IZ to be searchable.
 1. cuts down on duplicates/ near duplicates/ton of citations in results. Examples for OpenAccess and/or some Ebooks
 - 2.
3. Active for CDI only- only citations fed into CDI (only possible setting if a link in record e-collection).
 - a. cuts down on duplicate results for ebooks/e-videos. (Change coming later in 2021.)

Use case for duplicate ebooks in CDI

- Do not show as full text
 - Pro: use local bibs
 - Con: no access to book chapters, reviews, etc.
- Suppress bibs using CDI-Only activation
 - Pro: book chapters, reviews, etc. flagged as available online
 - Con: only works with collections that use the link in the record
 - Con: doesn't use local bibs. Relying on CDI citations only.

4. We subscribe to some...selective setting. In CDI tab "Electronic Collection Editor" level.
`yes`= only get some of the portfolios, match/check each citation to an active portfolio.
Takes longer to display results but more accurate.

no= get 100%/ aggregator- quicker display of results.

- -Can result in citations in CDI that are not (yet) active portfolios in the e-collection. Conversely, sometimes citations in CDI are still there for now deleted portfolios.
- -Not same as "Activate newly added portfolios..." setting.

Use Activate for search in CDI to expose the citation for the expanded search (Easy Active).

Roles: CDI Inventory Operator

Electronic Inventory Operator and same "Extended" so can delete e-collections or portfolios

Electronic Resource Manager/Extended

Repository Manager

To see if e-collection is link in record or link resolver-

- -See Alma entry for e-collection In CDI tab "Electronic Collection Editor" level.
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- -or
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/050CDI_Collection_Lists_for_Alma_Customers#CDI_Collection_List](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/050CDI_Collection_Lists_for_Alma_Customers#CDI_Collection_List) download the spreadsheet for easier scanning.

from chat:

Question 2: Where can I find out if some specific database is free to search?

Answer: A list of Alma collections that are marked as 'In CDI' is available to download on the page below.

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/050CDI_Collection_Lists_for_Alma_Customers#CDI_Collection_List](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/050CDI_Collection_Lists_for_Alma_Customers#CDI_Collection_List)

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Question 3: Is there a way to avoid duplicate listings when CDI is turned on in our PrimoVE discovery?

Answer: If the duplicates you are seeing are Ebook records, please see the "Why do we see duplicate Ebook records in CDI, and how can we avoid them?" section of the documentation at the link below for information on how to prevent duplicates.

https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/030Alma_-_CDI_Single_Activation/020Single_Activation_with_the_Fully_Flexible_Setting#Why_do_we_see_duplicate_EBook_records_in_CDI.2C_and_how_can_we_avoid_them.3F

Troubleshooting:

Search doesn't contain the article--is it activated for the CDI?

Expanded search doesn't have the article either - is it in the CDI?

It's active in CDI and Alma, but can't see it in discovery - (Need to wait 42 - 75 hours)

When I click the resource link, I get prompted to log in - check proxy and linking parameters -

- see if the interface/vendor is in section "Library-Specific Parameters" in [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/015Managing_Electronic_Resources](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/015Managing_Electronic_Resources)

Question about Fully Flexible or Easy Active - See blue bubble near link (need to check the recording for full answer)

Another question -- If we have a portfolio activated in Alma that is associated with an ISSN but does NOT have coverage dates set, are article records (with linkresolver linking) matching that ISSN in CDI Marked as "Available online"? We have a problem where such articles are being marked "Available online", but then it seems the link resolver does not provide the fulltext link for the article when coverage dates are not set.

Need to check the recording for answer.

"CDI-only full text activation" in the CDI tab of Electronic Collection Editor; could you go over what this selection means again? Full text linking - search for full text link in record. Collection might not be active. Need to check the recording for answer.

Is it possible to have your cake and eat it too with a collection where you subscribe to only some of the content? Meaning, can you turn on one instance of a collection to show online availability, but another instance of the collection for search in CDI only? There are collections where we would want users to be able to discover content we don't own or subscribe to yet so that we can ILL it or perhaps purchase it?

Yes can do this. De facto for Easy Active libs like I-Shares is set up so already.

So, if the collection is active in Alma and there are no portfolios - since the collection should be discoverable in CDI already, "CDI-only full text activation" selection should not make a difference right? Yes. (This is what active Alma Databases do. They have no portfolios but do feed in citations to CDI.)

Check https://knowledge.exlibrisgroup.com/Primo/Product_Materials/Primo_Webinars for more CDI-related webinars.

Note: EBSCOhost e-collections NOT feeding into CDI.

Will rerun PrimoVE Become an Expert series later in 2021.