Notes from the CARLI Primo VE – Become an Expert Discussion Section on "Central Discovery Index (CDI)"
March 25, 2021

Fully Flexible vs. Easy Active
CARLI: Note that all CARLI I-Share institutions are Easy Active and NOT Fully Flexible. Fully flexible is not something we can use. We came up on Easy Active and don't have the opportunity to change it, so no need to worry about any documentation or the parts of the Ex Libris presentation about Fully Flexible. In general, a lot of documenation about the Central Discovery Index (CDI) is from the angle that you were on Primo Central Index (PCI) and are converting to CDI. We did not do that. We came up on CDI in February 2020 during our Test Phase and were never using PCI.

General info:
https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/ Documentati on_and_Training/Documentation_and_Training_(English)/CDI_-_The_Central_Discovery_Index/090CDI_Tips_and_Tricks - This is a good page with specifics on using CDI.

COD: So then all of our subscription collections won't show in the CDI? Collections requiring subscription won't show up in the CDI?

CARLI: They will show up if they have free or paid options that feed into the CDI. EBSCOhost is an exception to this. You can check something like JSTOR or Springer Journals and see what it says in Alma. (Screen demo). Looking at e collection Humanities Ebook Collection in COD Alma. Take a look at the search rights for the collection.

Subscribe to Only Some Titles - Yes or No Setting
GRN: So, because the default setting when you activate an electronic service is Yes for "I only subscribe to some titles in the collection" (or words to that effect). Do we know what effect that has on our portfolios that are activated?

CARLI: We'll need to look into that further, but you'd want to set it to Yes if you really did only subscribe to some of the titles. If you set it to "No" and indicated you subscribed to all of the title, you would end up with results in Primo VE that you don't want because you don't have access to them. It might depend on the collection itself. Something where you might only subscribe to a few titles, then you'd want to pick and choose. If it's something like JSTOR where you know you get all of them, you would want to say "yes, I get all of these titles"

GRN: I was looking at some of my JSTOR collections and saw Life Sciences was marked YES, but it should have been No.

LEW: Re: Gail's question, I have the same question because we have some collections that calls selective, like Gale: Business Insights: Global, but we subscribe to the whole thing....right? Alma

CARLI: there is still some confusion and we're all still trying to wrap our heads around CDI. We'll research some more.

EBook Deduplication Enhancement

NCC: Should we wait for the enhancement for ebook deduplication that were discussed in the webinar as coming later in 2021? Versus looking at those CDI workaround options that were mentioned?

CARLI: We feel that waiting for the upcoming enhancement would be smart to see what it will offer. The presentation mentioned it is coming in the "second half of 2021" and it's March already, so rather than spending time on working with ebook deduplication workaround, it may be best to wait and see what the enhancement offers. Though if you feel like the duplication of ebooks is causing a lot of issues for your users, it may be more critical for you. As mentioned in the Ex Libris presentation, maybe patrons don't find duplicate entries as confusing as library staff do. Users probably feel like as long as they get to what they want, two entries aren't that bad. In addition, whatever changes you make now to work around duplication might have a negative consequence when the enhancement is released, or cause you to have to undo that workaround.

CDI-only full text activation setting
LEW: I still don't understand the "CDI-only full text activation" setting. Does it just mean there are no portfolios, but the content/citations are still in the central index? I see we have it turned on for EBSCO's ERIC database as well as ProQuest Dissertations and a couple others. Saw it as an option in one of the examples - has a CDI-only full text activation setting. What does it do other than activating it?

CARLI: Has to do with discovery index side vs. delivery side. It's a confusing setting. There was a slide in the Ex Libris presentation that we can possibly look at (shows slide from ExL): Having the full text linking being there but you are not using the index or citations from the shown collection. If the titles in the collection are indexed someplace else, your user is doing a search in Primo VE and find a match in another collection.

Pros are to cut down on duplicate citations and clutter where you might find lots of matches with the same citation.

CARLI: we think that CDI full text only would help with discovery or linking to the full text rather than adding additional citations to the discovery side. With ERIC or some dissertation or MLA bibliography, they don't have portfolios, but you want people to be able to search the indexing there.

LEW: So does it only appear in the expanded search? If you use that setting? Still don't get the cause and effect from this setting.

CARLI: They are saying you'll find that content but not through the particular collection. You'll find the content through maybe another provider. You could still get results from the CDI even if the collection is not activated. This is all worth some additional testing.

Where are citations coming from?
GRN: Can I ask a question about where a citation in Primo comes from? So, if I am in EBSCO Academic Search complete and I click on our "Get This" button to check Discovery for full text it will take you to a record that is a dead end. Where is that coming from?

Example from GRN showing citation in EBSCO's interface in Academic Search Complete. There is no Full text in Academic Search Complete, but it links back to Primo VE, and when logged into Primo VE, if you look at Permalink for the record, the sid= shows the source.

If you search a title of article directly in Primo VE, see that the result might be coming from Psych Info or PubMed Central rather than Academic Search Complete.

The **discovery** is where the citation comes from in the index--the **delivery** may come from another source that is activated in your Alma IZ. The citation from one place and the source from another are being connected via CDI.

COD: So are EBSCOhost articles appearing there too?

CARLI: EBSCO does not provide its information to be used in CDI, so citations coming from a different source via CDI and the actual link to the item coming from an EBSCO resource that is activated in Alma, is how to get around that. The discovery is through CDI but the delivery is through whatever resources you have set up in Alma. This can be seen by noting in the Primo VE record if the permalink refers to one resource and is different from the full text link!

Example:

General question: how are people finding using EBSCO API vs using CDI to get the info (as in the example above)?
- Not really using the EBSCO API at all.
- We have it but I doubt our users actually use the EBSCO slot

- We have the EBSCO APi available but they aren't really using it at all. Easier to go directly to EBSCO.

CARLI: CDI is trying to be everything for everyone, but not all people are searching it in the same way.

Idea Exchange to Make CDI Better
CARLI recommends voting for this [Idea Exchange](#) entry if you are interested in changing this behavior. It would be helpful to be able to filter CDI results in Primo VE to exclude certain things when the data are poor or doesn't make sense as a result. Long-term improving the CDI.

https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/41644846-add-ability-to-prevent-cdi-content-from-appearing

General reminder on how to use the Ex Libris Idea Exchange - anyone at an I-Share institution library can sign up and vote. We have lots of people in CARLI, so our voting could be effective to push ideas that are important to us up the "ranks".

Not Show in CDI
COD: Didn't she say in the presentation that if you use "link in record" you can say not to show CDI even if something is active in Alma?

CARLI: You can do that, but we're not sure why anyone would want to completely shut it out of CDI. You can do that for certain free materials you might have active in your IZ - if you have millions of Hathi trust ebook collections and you only want that to show in a library catalog search perhaps. But if you have it activated in your IZ you'd probably want it to show in the CDI.