



CDI Overview: Take 2

February 21, 2020

CDI Task Force

<https://slcny.libguides.com/cdi-task-force>



Plan for Today

- Review the Central Discovery Index (CDI)
- Present timeline
- Discuss clean-up options
- Provide testing instructions
- Explore known issues
- Describe troubleshooting and problem reporting



The State University
of New York

Task Force Committee

Nancy Babb, University at Buffalo, co-chair
Discovery Working Group
Michelle Eichelberger, co-chair SLSS
Rebecca Nous, University at Albany
Jennifer Parker, SUNY Cortland
Noah Roth, Broome CC
Amanda Hollister, Broome CC

Timeline

- August: Form CDI Task Force
- October: Initial Task Force Meeting
- Nov 12: Ex Libris Kick-off Meeting
- Nov 17: Content migrated from PCI
- Nov 18-late Dec: Testing
- Postponement of go-live to May 2020
- Jan-Feb: Alma releases improve CDI functionality
- Feb 9: NA collections added to Alma
- Feb-Mar: Start campus training



What's the CDI and How Does it Compare to PCI?

PCI:

- You control all search (unexpanded and expanded) by activating collections in the PCI.
- Activate full-text in Alma.

Summon/EDS:

- You control full-text activations but not search.

CDI:

- You control expanded search only.
- Activate full-text in Alma. Anything full-text is automatically searchable with CDI index.

What's the CDI and How Does it Compare to PCI?

PCI to CDI migration makes it seem like you can still control search **BUT** you're only controlling it for expanded searching.

Think about it this way:

- All full-text is automatically searchable using default CDI index
- If you didn't activate any collections just for search, your expanded search would be the same as your unexpanded search. You'd get the same results.
- Adding collections for CDI search makes those collections searchable in an expanded search.
- Any new collections you add for full-text default to being searchable in CDI

All configuration is now done in Alma rather than Alma + PCI

What's the CDI and How Does it Compare to PCI?

Example 1:

- You activate your Sciencedirect portfolios for full-text = those will come up as search results in both unexpanded and expanded searching.
- If you want ALL of Sciencedirect to be searchable, so that you can get results in an expanded search and let your patrons request those articles, you need to make sure that the collection is Active for Search in CDI = yes

Example 2:

- You want Scopus to be searchable in an expanded search
- Scopus is an A&I database and doesn't have any portfolios, so you don't need to activate it for full-text but you do need to make sure that the collection is Active for Search in CDI = yes

eBooks and Alternative Coverage

eBooks:

- With PCI can choose to not activate chapter/reference entry search in the PCI, but still search Alma bib record.
- With CDI, all or nothing. Activating an eBook for full-text means that that book will be automatically searchable by chapter or reference entry

Alternative coverage:

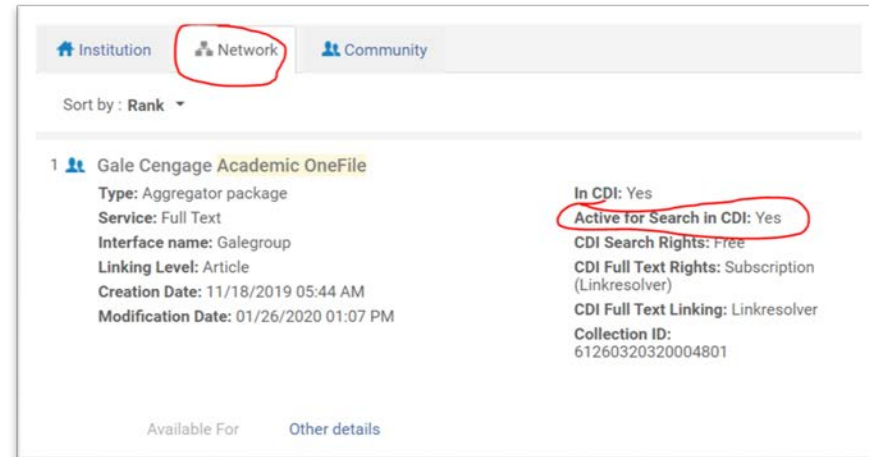
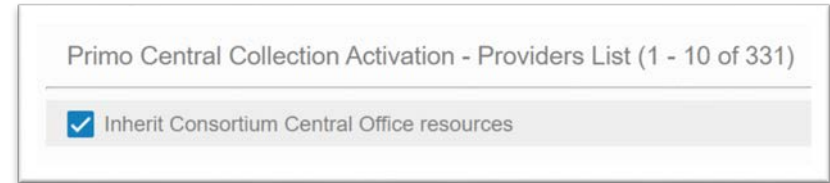
- No longer needed to get indexing for EBSCO content. Activation of EBSCO content for full-text will give you EBSCO article search results.
- But, if you want to keep former “alternative access” collections active for searching, you’ll get that indexing in expanded searching. It doesn’t hurt to keep them active, unless you don’t like the search results you get from them.

Network Activations

If you selected “inherit network settings” in the PCI, you’ll continue to inherit those collections for search in CDI.

Waiting for Ex Libris to add cdi_inheritance parameter.

Can see collections active for search in CDI on Network tab.



Migration Report

Content migrated from PCI to CDI on November 17th

- NA: At the time of migration, some of the collections from the PCI didn't exist in Alma and showed as NA or Not Available
- Most of those collections have been populated now, many added Feb 9
- Will show as new line in report, along with original NA line
- Helpful to sort by PC_ID when reviewing your report.

PC to CDI Activation Report

PC ID	Electronic Collection Name	Alma Collection ID	CDI Search activation status	CDI full text availability status	Available for	CDI full text linking method	Notes
1... 108	Open Access Journals	6138879760004825	Activated	already active in Alma	-	Record	Collection was already active in Alma
1... 1080	NA	NA	-	-	-	-	Missing mapping for PC ID: 1080
1... 1080	HathiTrust (Public Domain within US only)	6167492480004825	Activated	Activated for CDI only	-	Link in Record	Collection was not active in Alma

Migration Report: NA continued

If you still have some NAs without matches in your report, they might be included in:

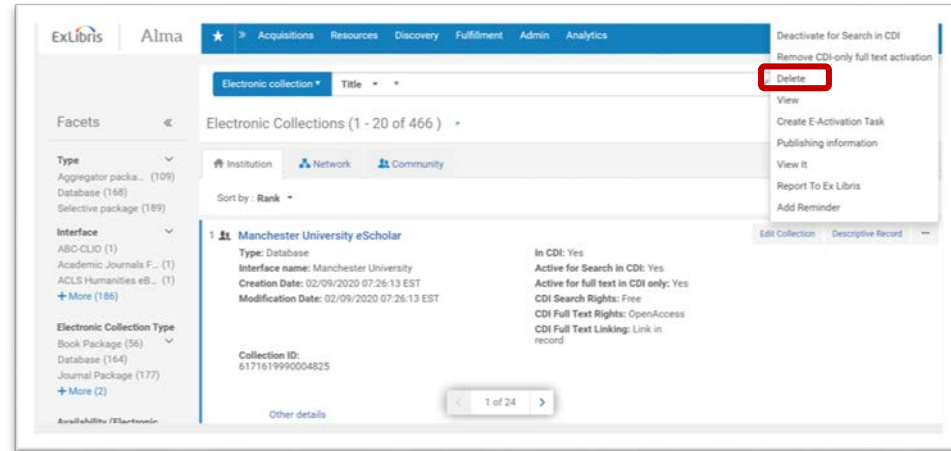
1. Collections that are planned to be removed from PCI in the near future (announced in the Release Notes)
2. Nine collections that were not mapped yet since their content was not finalized yet:

PC ID	PC Collection name
940	TDX (Tesis Doctorals en Xarxa)
1071	GeoRef (Ei Village 2)
1819	Repositorio Digital de Tesis PUCP (Pontificia Universidad Catolica del Peru)
1866	Pe'er (פא"ר)
1821	DigitalCommons@McMaster (McMaster University Library)
2007	SDEIR (Université du Québec à Chicoutimi)
4453	IGDC Bibliographic Database
14335	Bloomsbury Academic: Essential Histories (Osprey Publishing)
14336	Bloomsbury Academic: Continuing Professional Development

Migration Report: To-dos

What should you do with this report?

- Use it in conjunction with a * search in your electronic collections
- Identify what was migrated from the PCI and decide whether or not you want to keep it active for searching in your expanded search.
- Need CDI Operator role to make changes
- If you decide that you don't want to keep the collection active for search, best practice is to fully delete the collection from your IZ (can deactivate but leaves clutter)



Note: If extended support campuses have questions, reach out to your support person

What will you see in Alma: Facets and Actions

The screenshot displays the Alma interface for 'Electronic Collections (1 - 20 of 136) oxford journals'. The left sidebar contains facets for 'Type', 'Interface', 'Electronic Collection Type', and 'CDI Search Activation'. The main area shows a list of collections, with details for 'Oxford Journals (Oxford University Press Journals)' and 'Oxford Journals Open Access Collection' visible. Callouts highlight specific features: an orange box points to the 'CDI Search Activation' facet, stating it is 'Visible to all users regardless of their role'; a red box points to the 'CDI Search Activation' facet, stating it is 'Visible only to users with the CDI inventory operator role'; another red box points to the 'Deactivate for Search in CDI' button, and a final red box points to the 'Remove CDI-only full text activation' button.

Visible to all users regardless of their role

Visible only to users with the CDI inventory operator role

Deactivate for Search in CDI

Remove CDI-only full text activation

CDI Search Activation
Active for Search (1620)
Not Active for Search (7)

In CDI: Yes
Active for Search in CDI: Yes
CDI Search Rights: Free
CDI Full Text Rights: Subscription (Linkresolver)
CDI Full Text Linking: Linkresolver
Orders: 1
Collection ID: 61265112470002101

Deactivate for Search in CDI Edit Collection ...

Deactivate for Search in CDI Remove CDI-only full text activation ...

Electronic collection Keywords oxford journals

Facets Electronic Collections (1 - 20 of 136) oxford journals Save Query

Type
Aggregator packa... (457)
Database (455)
Selective package (1633)

Sort by: Rank

Interface
AAPG DataPages (1)
ABC-CLIO (1)
Academic Journals F... (1)
+ More (544)

Electronic Collection Type
Book Package (1137)
Journal Package (836)
Mixed Material Pa... (145)
OPAC (1)

1 Oxford Journals (Oxford University Press Journals)
Type: Selective package
Services: Full Text (Available)
Interface name: Oxford University Press
Linking Level: Article
Creation Date: 07/02/2012 08:00:00 AWST
Modification Date: 26/09/2019 20:37:39 AWST

Other details

2 Oxford Journals Open Access Collection
Type: Selective packa...
Services: Full Text (No...
Interface name: Oxfor...
Linking Level: Article
Creation Date: 05/09/...
Modification Date: 26/...

CDI: Yes
Active for Search in CDI: Yes
Active for full text in CDI only: Yes
Search Rights: Free
Full Text Rights: OpenAccess
Full Text Linking: Link in record
Collection ID: 61390548150002101

What will you see in Alma: Collection Search

New filters in the Advanced Search on Alma

Electronic collection ▾ Zone: Institution Community

Keywords Contains Keywords ▾

AND OR Contains Keywords ▾

Electronic Collection

- Electronic Collection : Electronic Collection Name
- Electronic Collection : In CDI**
- Electronic Collection : CDI Search rights
- Electronic Collection : CDI Fulltext rights
- Electronic Collection : URL (Electronic Collection)
- Title
- Electronic Collection
- Electronic Portfolio

Oxford journals (Oxford University Press Journals)

Type: Selective package
Services: Full Text (Available)
Interface name: Oxford University Press
Linking Level: Article

In CDI: Yes
Active for Search in CDI: Yes
CDI Search Rights: Free
CDI Full Text Rights: Subscription (Linkresolver)
CDI Full Text Linking: Linkresolver
Orders: 1

Facets

Type

- Aggregator package (50)
- Database (1)
- Selective package (85)

Interface

- ACLS Humanities eB... (1)
- Adam Matthew Digital (1)
- Allen Press (1)
- + More (44)

Electronic Collection

Institution

Sort by: Rank

1

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Visible to all users regardless of their role

What will you see in Alma: Collection Tab

A new CDI tab in the Electronic Collection Editor

Electronic collection ▾ Keywords ▾ Advanced ▾

< Electronic Collection Editor Contribute to Community Cancel Save

Highwire Press National Academy of Sciences 1 ▾

Visible as read only to all users regardless of their role,
editable only for users with the cdi inventory operator role

Electronic Collection Description General Additional **Notes** History CDI

CDI Search activation status Searchable Not Searchable

We subscribe to only some titles in this collection Yes No

Do not show as Full Text available in CDI even if active in Alma

CDI Collection ID	<input type="text" value="PNE"/>	In CDI	No
Number of records	0	Resource Types	Journals
CDI update frequency	Weekly	CDI Search Rights	Free
CDI Full Text Rights	Subscription (Collection Level)	CDI Full Text Linking	-
Newspapers	No		

What will you see in Alma: Activation Wizard

Added activation functions in the Activation Wizard

Activation Wizard: Electronic Collection and Services Setup

1 ? Cancel Next

CiNii Complete

Type: Selective package
Number of portfolios: 5342

Electronic Collection URL:

Additional descriptive information:

Visible as read only to all users regardless of their role, editable only for users with the cdi inventory operator role

Local Electronic Collection Information

Public name:

Level URL:

Mark Bib as suppressed:

Electronic Collection Proxy Enabled: No Yes

Library:

Additional descriptive information: CiNii Complete X

Electronic Collection Proxy Selected:

Central Discovery Index information

CDI Search activation status: Searchable Not Searchable

We subscribe to only some titles in this collection: Yes No

Do not show as Full Text available in CDI even if active in Alma:

EBSCO

As always, EBSCO is special. As with the PCI, we don't have access to EBSCO indexing.

You'll see the option to mark collections "Active for Search in CDI" but that's not accurate. Ex Libris has told us that it doesn't matter if that's marked yes or not. Also, some collections will have tags and some won't. You can ignore. Your EBSCO full-text will automatically be searchable with other indexes.

The screenshot displays two entries for EBSCOhost sources. The first entry, 'EBSCOhost Education Source', has the 'Active for Search in CDI: Yes' option highlighted with a red box. The second entry, 'EBSCOhost Humanities Source', also has this option checked. Both entries show details such as Type, Services, Interface name, Linking Level, Creation Date, Modification Date, and Process type. The 'In CDI: Yes' status is also visible for both.

Source ID	Source Name	Type	Services	Interface name	Linking Level	Creation Date	Modification Date	Process type	In CDI	Active for Search in CDI	CDI Search Rights	CDI Full Text Rights	CDI Full Text Linking	Collection ID	Orders
2	EBSCOhost Education Source	Aggregator package	Full Text (Available)	EBSCOhost	Article	06/10/2019 7:43 AM	02/13/2020 7:17 PM	Acquisition	Yes	Yes	Free	Subscription (Linkresolver)	Linkresolver	6167199510004821	1
3	EBSCOhost Humanities Source	Aggregator package	Full Text (Available)	EBSCOhost	Journal	06/10/2019 7:43 AM	02/17/2020 9:20 AM		Yes	Yes	Free	Subscription (Linkresolver)	Linkresolver		1

Search Rights

We will continue to have "Restricted for search" / "Search Rights = Subscription" collections in CDI as in the PCI. Be careful activating these for search and only activate those for which you have a subscription. You can identify them by CDI fields:

Biodiversity Heritage Library

Type: Selective package

Service: Full Text

Interface name: Biodiversity Heritage Library

Linking Level: Journal

Creation Date: 03/31/2017 07:43:23 EDT

Modification Date: 02/03/2020 05:06:43 EST

In CDI: Yes

CDI Search Rights: Free

CDI Full Text Rights: OpenAccess

CDI Full Text Linking: Link in record

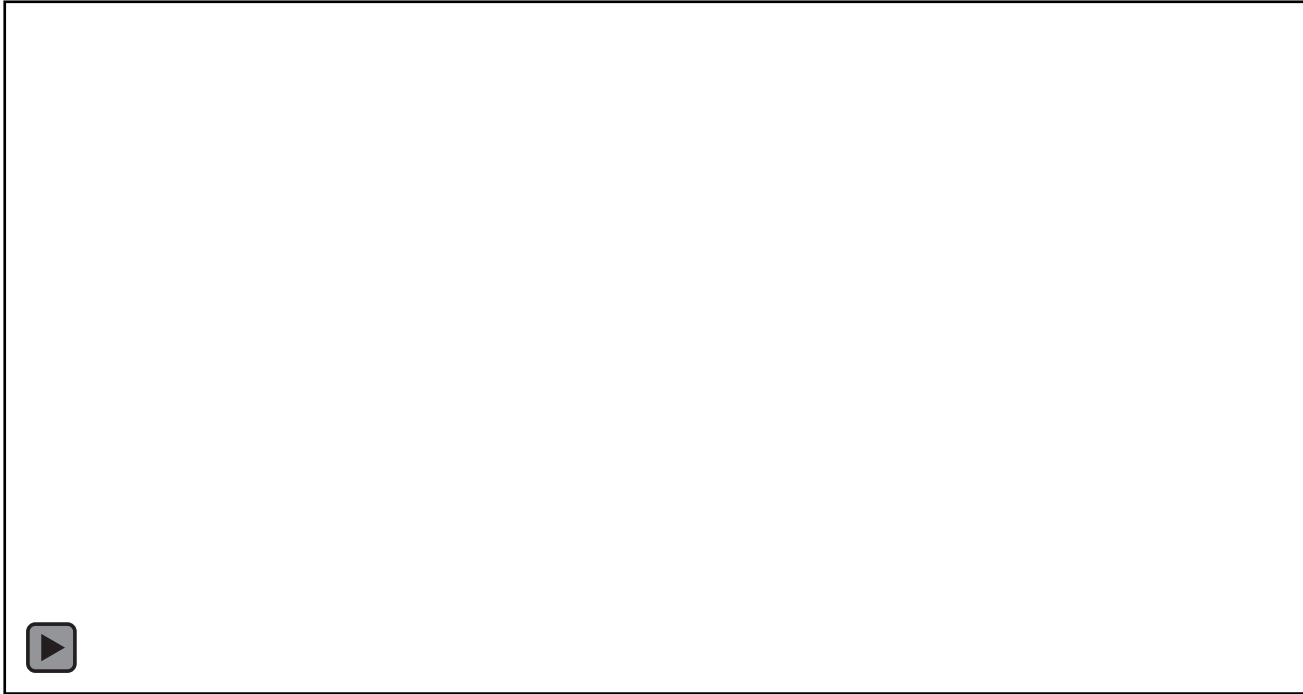
Collection ID:
613780000000001162

How to Test CDI Activations and Deactivations

- Should take no longer than 48 hours for changes to go into effect for activating or deactivating
- Active or inactive for CDI search will only affect expanded searching
- Full-text content activations should appear as available and in unexpanded searching within 48 hours
- To test in Primo, add &searchCDI=true to end of search string URL
- Amanda Hollister created bookmarklet:

```
javascript:(function(){window.s0=document.createElement('script');window.s0.setAttribute('type','text/javascript');window.s0.setAttribute('src','https://bookmarkify.it/bookmarklets/17293/raw');document.getElementsByTagName('body')[0].appendChild(window.s0);})();
```

How to Test CDI in Primo: Bookmarklet Demo



Expected CDI Primo VE Behavior

Merged Records:

- You'll see one merged article type record instead of record groups
- This will improve visibility of all subject headings from various index sources, all identifier numbers should show
- Will reduce confusion about why an article shows up on a specific search when that search can't be seen on the default record for the record group. The search term is often buried in another record in the group



More Results:

- Due to eBook chapter/reference entry searching

Resource Types & Facets

New/Merged Resource Types:

- Dataset - merges Research Dataset and Statistical Dataset
- Archival Material/Manuscript - merges Archival Material and Manuscript
- Newspaper
- Microform
- Market Research
- Standard
- Computer File
- Legal Documents - merges with articles

Resource Types that are renamed:

- Book Review is now Review
- Technical Report is now Report
- Audio/visual are now audio or video
- Websites are now Web Resources

If you're using resource type codes in any custom code within outside Primo, you should review the knowledge center documentation and make sure the code for the resource type you are using is up to date. Example: direct search for all videos

Known Issues: Availability

Problems with incorrect availability were a big reason why the task force decided not to implement CDI in January. Task Force has seen problems in many instances, but reference entries seem to be especially bad.

Recent example:

Search for paregoric and filtered to Reference Entries, and of the first 10 results, 2 have bad availability (initial display available online updates to check for available services upon opening record). Broome also has the same results. Both seem to come from Davis's Drug Guide [https://suny-bcc.primo.exlibrisgroup.com/discovery/search?query=any,contains,paregoric&tab=Dropdown&search scope=MyInst and CI&vid=01SUNY BCC:CDI&facet=rtype,include,reference entrys &lang=en&offset=0&searchCDI=true](https://suny-bcc.primo.exlibrisgroup.com/discovery/search?query=any,contains,paregoric&tab=Dropdown&search%20scope=MyInst%20and%20CI&vid=01SUNY_BCC:CDI&facet=rtype,include,reference%20entrys&lang=en&offset=0&searchCDI=true)

Ex Libris: "I would like to update that the root cause of this issue has been found and the issue is currently partially solved. There are still cases where this issue happen and they are being handled by our content team."

Known Issues: Availability, continued

Don't be surprised if you see inaccurate availability - should improve over next few months.

What you should expect to be counted as "available:"

- Anything activated for full-text
- Any physical content (remember that Primo can't "see" your physical journal coverage dates - it only knows that you own it or not)
- Any "link in record" collections from the PCI/CDI, e.g. Open Access

Be careful of collections like eBook Central where you may only subscribe to selective content - if content activation is full collection, system will think that you own everything

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Gale Virtual Reference Library Gale Group Farmington Hills, Mic

Collection name Gale Cengage Virtual Reference Libr...

Collection ID 6117348640004832

Provider EFU

package code (DB id)

Electronic Collection Description General Additional Notes History CDI

CDI Institution Settings

CDI Search activation status Not Active

We subscribe to only some titles in this collection Yes

Other Known Issues

In development/analysis with target release in March:

- Rights filter for related items is being added (Functional gap)
- "New Resource" facet needs to be added (Functional gap)

Smaller issues that were reported for specific scenarios

- Add all collections a (merged) record is from to the collection facet
- Open Access facet issues - in some cases the open access facet does not limit to Open Access results
- Incorrect labels in the detailed view: "View record" instead of "Access content in <provider>"
- Incorrect (missing) rights display - several cases were reported related to collection level rights
- Alma Facet counts are incorrect
- Known item searches: In some cases specific field searches returned no results, or results rank too low (combinations of title/author/date searches)

In development/analysis with target release in April/May:

- Snippet Info does not always display correctly in Primo UI (fix)
- Reduce the long tail of results (return less results)

[CDI Known Issues](#), Ex Libris

Reporting Problems or Asking Questions

Salesforce isn't prepared to answer CDI questions until after the product is rolled out.

Please post any problems you find or questions that you have on Basecamp SUNY HQ and members of the CDI Task Force will do their best to answer, or we can forward your concerns to Ex Libris through our early adopter Basecamp. Please start your message post with CDI:

The more testing you do before go-live, the better. We have communication channel with Ex Libris and can work towards resolving issues before go-live.

There will be a [follow-up Q&A](#) session next Friday, February 28 at 2pm.

Tentative Go-live Date

May 2020						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Sunday, May 17, 2020

<https://www.wincalendar.com/Calendar/Date/May-17-2020>

References

[CDI Collection Lists](#), Ex Libris

Ex Libris webinar: Single Activation on Alma:

<https://proquestmeetings.webex.com/recordingservice/sites/proquestmeetings/recording/f8dce22f628b42149174b40ccfb87a56>

https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/010Managing_Collections_and_Their_Content_for_Discovery/040Resource_Types_in_CDI