



Ask the Expert: SFX – CDI Single Activation

Webinar, May 12 2021

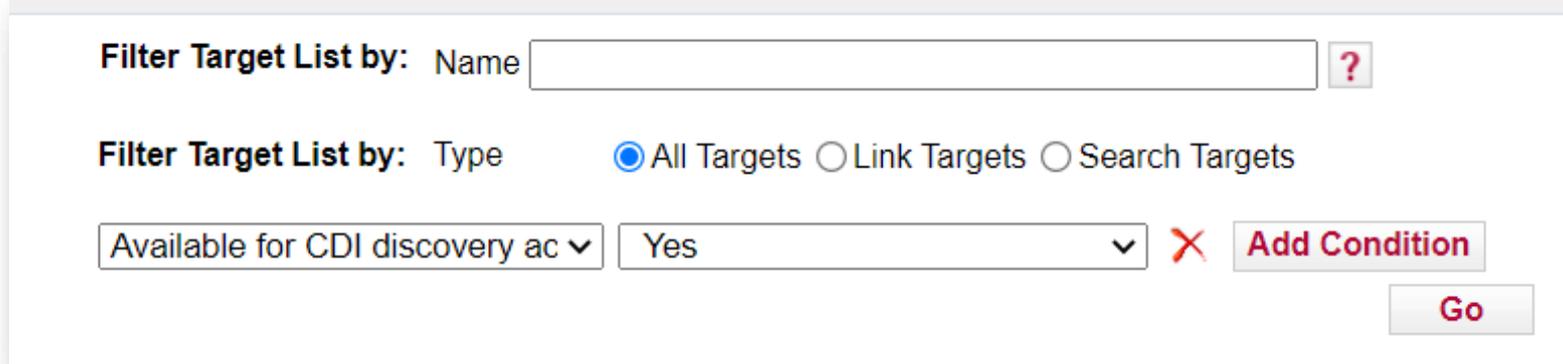
Lieve Rottiers

Question 1: KBManager

Question: How can I get a list of all targets that I can activate for search in CDI?

Answer: You can use the „Filter target list“ option to filter by „Available for CDI discovery activation“.

In June, we will also add a new export option to the basic export in SFXAdmin to export all targets available for search activation



Filter Target List by: Name ?

Filter Target List by: Type All Targets Link Targets Search Targets

Available for CDI discovery ac ▼ Yes ▼ ✕ **Add Condition**

Go

Question 2: Activation Source

Question: What is the meaning of the source "Alma/SFX Local Collection". It sometimes appears in the full view of a record and in the collection facet.

Answer: This collection name appears for targets that have no mapping to CDI. It usually applies to locally created targets, or consortium targets – in exceptional cases also for others. These targets only exist in the KnowledgeBase. Their content may still be discoverable in CDI because it is ingested from one or more data sources, and - based on activations in this target - the associated content will be set to „full text available“ in CDI. However, the Target name cannot be mapped in CDI and it therefore appears as "Alma/SFX Local Collection“.

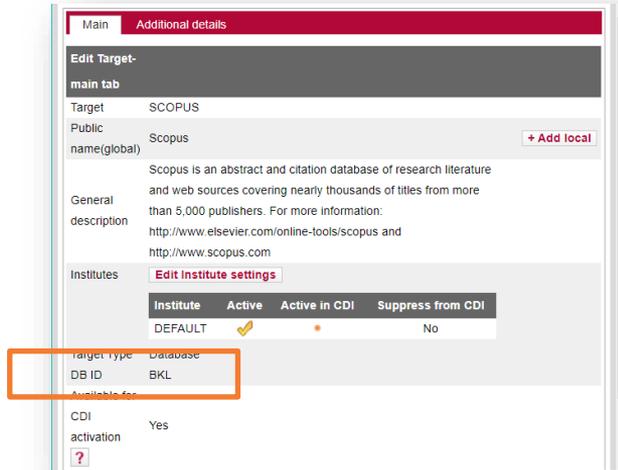
Question 3: Testing

Question: I activated a collection in SFX. How can I check that the content is searchable in CDI?

Answer: Currently it takes about 72 hours for your rights to be processed on CDI. We are going to reduce this to 24 – 48 hours towards the end of the year. After that time has elapsed there are various options to check for records from this collection. For full text, for example a journal, best is to just search for articles in this journal, or/and the ISSN. If the target is a database (without portfolios) you can use the DBID.

Using the DBID to find records from a specific collection

1. Copy the DBID from the corresponding field in the edit target window



2. Paste the URL into a Primo search link, e.g. run a search on your primo using any search term of your choice, replace the search string in the URL with the DBID:

In the URL replace *query=any,contains,test* with *query=dbid,contains,BKL*

Question 4: Discover/Search and Full text activation

Question: Can I activate a Target for both Discovery and Full text and what is the impact?

Answer:

1. For Targets with portfolios, and search targets labelled as full text (on collection level): If you activate a full text target with portfolios, the active portfolios will automatically be published to CDI and be discoverable with the „full text available“ flag (in the filtered search). Same for a search target labelled as full text: all content will be discoverable with the „full text available“ flag.

If you also activate the same target for discovery, then all inactive portfolios will also be discoverable but they will only come up in the expand search and be flagged as „no full text available“ (unless they are available from a different target) ...

For the search target labelled as full text, there will be no difference in case there is activation for both Discovery and Full text: all content will be flagged as „full text available“

Question 4 cont.

Question: Can I activate a Target for both Discovery and Full text and what is the impact?

Answer cont.

2. For search targets without portfolios that are A&I databases that are not free for search (require a subscription, e.g. Scopus): You need to fully activate the target like a full text target (you cannot just activate it for discovery).

Note that we are going to change this in the SFX June 2021 Release because it is not very intuitive, and many customers accidentally used the search activation. From June, you can use both the full activation and the discovery activation and both will have the same impact – the content will be discoverable in CDI.

Question 5: Alternative coverage

Question: How can you see which material is covered by alternative coverage as opposed to directly from a publisher?

Answer: You can see this in the edit target window in the CDI section, the field is called Provider coverage. You can also check this in the SFX CDI collection list which is available from our KnowledgeCenter:

[https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_\(English\)/SFX_-_CDI_Single_Activation/CDI_Collection_Lists_for_SFX_Customers](https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_(English)/SFX_-_CDI_Single_Activation/CDI_Collection_Lists_for_SFX_Customers)



Available for CDI activation	Yes
This target is searchable via CDI - with the following setting:	
Search rights	Free
Fulltext rights	Subscription (Linkresolver)
Linking	Linkresolver
Newspaper ?	No
Number of records	59911877
Resource Types	trade publication article, microfilm, book chapter, magazine article, conference proceeding
CDI update frequency	Monthly
Provider coverage	No
CDI Type	Full Text Collection
CDI Last Market update	

Question 6: Linking method

Question: Why do some collections use the link resolver and some use link in record?

Answer: There are pros and cons to both linking methods but generally we are using the **linkresolver** for Selective and Aggregator collections, when we have a linking syntax from the provider and good identifiers in CD Discovery and KB. The advantage is that such links are configurable for you. The disadvantage is that they sometimes do not work well if only metadata can be used for linking.

Link in record is generally used in cases where the record is uniquely available from a single platform and/or the link is difficult or impossible to create using the link resolver. In exceptional cases we are creating **hybrid** collections. These are collections that contain some material with good metadata and identifiers and some without. Hybrid means that part of the collection uses the link resolver, and part is using link in record and they will be marked as such in Alma and SFX.

Question 7: Link preference

Question: Is there a way to show both – the link in record and the link resolver links? I know that there is a priority setting and it seems to work well but we would prefer to have all links available.

Answer: At this time the system only shows one option, either the link record, or the link resolver links according to the priority setting that is documented in the article **CDI and Linking to Electronic Full Text**. But we are going to add an option to show all links later this year, it is currently scheduled for December.

[https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_\(English\)/CDI_-_The_Central_Discovery_Index/050CDI_and_Linking_to_Electronic_Full_Text](https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_(English)/CDI_-_The_Central_Discovery_Index/050CDI_and_Linking_to_Electronic_Full_Text)

Support and documentation

Documentation:

- Target activation for CDI in SFX:
[https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_\(English\)/SFX - CDI Single Activation/010Target Activation for CDI in SFX](https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_(English)/SFX_-_CDI_Single_Activation/010Target_Activation_for_CDI_in_SFX)
- CDI and Linking to Electronic Full Text:
[https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_\(English\)/CDI -
_The_Central_Discovery_Index/050CDI_and_Linking_to_Electronic_Full_Text](https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_(English)/CDI_-_The_Central_Discovery_Index/050CDI_and_Linking_to_Electronic_Full_Text)
- CDI Collection Lists for SFX:
[https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_\(English\)/SFX - CDI Single Activation/CDI Collection Lists for SFX Customers](https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_(English)/SFX_-_CDI_Single_Activation/CDI_Collection_Lists_for_SFX_Customers)

Support and questions:

- In case of linking issues please open a support case
- For more general questions please contact us at cdi_info@exlibrisgroup.com



Thank you!