

Central Discovery Index (CDI)





Agenda	

- What is CDI?
- How is availability determined?
- How can you control availability?
- EasyActive/Fully Flexible Setting
- CDI Attributes
- How Does CDI Activation Affect Search Results?
- Troubleshooting

CDI, Alma, and Discovery

Discovery

- Central Discovery Index
- Includes over 5 billion citations
- Accessible in both of Ex Libris' discovery systems
- Most resources are free to search
- Some A&I databases require a subscription to search



Delivery

- Linking to content via Alma
- Full-text content in its own database/repository
- Direct linking or use of link resolver
- May require authentication or authorization to access

How does this all work?



Content loaded into CDI

Patrons search index via Primo VE/Summon

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Content loaded into CDI

Patrons search index via Primo VE/Summon

Receive results

Access full text via links

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PAGE 1		Title	Chocolate and Health-Related Quality of Life: A Study: e0123161	A Prospective	MORE SUGGESTIONS
~		Creator	Balboa-Castillo, Teresa > Lopez-Garcia. Esther >		• •

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Availability Status



- Active portfolios in electronic collections
 - Publishing includes identifiers and coverage
 - CDI matches relevant content and marks content as "Available Online"
- Active databases (i.e., electronic collections without portfolios)
 - Publishing includes the collection's ID (DBID)
 - CDI matches content based on the ID and marks all database content in CDI as 'Available Online'



Publish Electronic Records to Central Discovery Index

Alma Sandbox	Advanced Tools Overlap and Collection Analysis Duplicate Title Analysis Manage Deleted Repository Restore Jobs	Publishing Pro Profile Details	ofile Details	Cancel	Save
Resources Research	PC to CDI Activation Report Publishing Publishing Profiles Publishing Information	Profile name * Profile description	Publish electronic records to Central Discovery Index Publish electonic records to Central Discovery Index		
Discovery		Publishing Parame	ters		~
Fulfillment 9 Admin		Status Scheduling	Active Inactive Every day at 24:00	•	

Resources > Publishing > Publishing Profiles > Publish Electronic Records to CDI



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User Roles

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				re		ce activatio ry jobs, and Editor			•	•		•	

Option 1: Activate/Deactivate Collection in Alma

If you set the **Service Activation** status to "Not Available":

- Shows as "No Access" in search results
- Links to full text will not appear in full record

Collection n		ubMed Central Jo ull Text	urnals Free	Collecti Service
Activation	Servi	ce Description	Linking	Portfolios
Service act	ivation status	Not Available	e 🔵 Availal	ble
por associate	service	🔵 No 🌑 Yes		
Active fro	m date			
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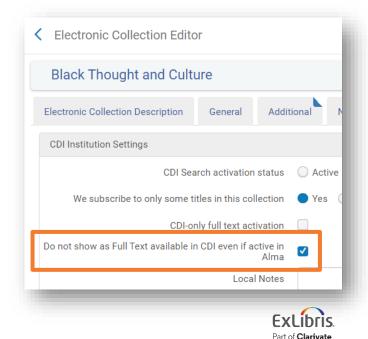
Option 2: 'Do not show as Full Text available ...'

If collection is **Active** in Alma, you can select **"Do not show as Full Text** available in CDI even if active in Alma":

- Shows as 'unavailable' in search results
- Links to full text will still appear in full record

Why do this?

Use Case: Prevent OA content from cluttering search results



Option 3: Exclude Ebooks from CDI Search Results

Use your own eBook catalog records (in your Primo local index) instead of the eBook records from CDL

- All eBook records will be filtered from the CDI results
- Users will see only your eBook catalog records in blended searches.
- Chapter-level records are not affected and will still be returned as part of the CDI results.

Configuration > Discovery > Search **Configuration > Search Profiles**

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	Code *	MyInst_and_CI		Display Name *	Search everything		6)
	Description	Blended - All re	cords belonging to your inst					
Lis	t of Scopes inclu	ded in the Search	Profile					~
					🔁 Add	Scope 🗸	₿	•
	Code	Name	Description					
1	CentralIndex	Central Index	All records within your Cent	ral Index profile	Filter by Availability	Exclude eBooks		
2	MyInstitution	My Institution	All records belonging to you	ur institution				

Option 4: 'Activate for Full Text in CDI only'

If collection is INACTIVE in Alma, you can mark it as 'Available Online' only in CDI

- Shows as 'Available' in search results
- Direct link to full text will appear in full record
- For collections that use the link in record rather than the link resolver

Sort by : Rank 🝷			⊳ ¢
China, America and the Pacific Type: Selective package Service: Full Text Full Text Linking in CDI: Link in record Interface name: Adam Matthew Digital Linking Level: Book	CDI Type: Full Text Collection CDI Last Market Update: 26/04/2016	Pc Collection ID: 613790000000 MMS ID: 9981328241000	Activate for Full Text in CDI only Descriptive Record Order
Creation Date: 06/21/2017 10:38:35 EDT Modification Date: 07/11/2021 09:02:22 EDT Provider coverage: Yes Search Rights in CDI: Free Full Text Rights in CDI: Subscription (Linkresolver)			Report To Ex Libris

Option 5: 'We subscribe to only some titles ...'

- If collection that is a selective package is Active in Alma, you have the option to mark the entire collection content as 'Available Online' in CDI regardless of the portfolio's activation in Alma
- For collections that use the **link in record** rather than the link resolver

ectronic Collection Description General Addition	nal Notes History CDI
CDI Institution Settings	
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	
Local Notes	

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EasyActive Setting

 Tweak your results
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 Expand My Results
 Tweak your results

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EasyActive—

- Majority of the collections in CDI are searchable
- Exceptions include collections that require a subscription to search (such as A&I databases)

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online Help_(English)/Electronic_Resource_Management/060_Alma_Single_Activation_Source for_CDI/040Single_Activation_with_the_EasyActive_Setting#EasyActive_Setting



Fully Flexible Setting

Tweak you	r results		0 selected	PAGE 1	160,652 Re	sults	
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Fully Flexible—

- This model may be in use if your library was using Primo before the migration to Alma
- Activations in Alma are automatically searchable in the CDI (no second step)
- You choose which resources appear in an expanded search (like you did in the Primo Back Office)
- Ex Libris offers an option to move from Fully Flexible to EasyActive

https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help (Englis h)/Electronic Resource Management/060 Alma Single Activation Source for CDI/020Single Act ivation with the Fully Flexible Setting



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CDI Activation Analysis Tool

Jaw Halp							
<u>New Help</u>							
Execution D	etails						
 Record : Status : 		ademiconefile_A680774 g activations: Database Name ?	4863 Rights Type	Portfolio	Requires Authentication for Search	Activation Type	Full Text Linking
AAYXX	CrossRef	CrossRef	DBID	-	No	Search Only	No
SES	Elsevier	ScienceDirect Journals (5 years ago - present)	Title	-	No	Search Only	No

<u>CDI Tips and Tricks</u> page from the Customer Knowledge Center



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1. Why can't I find the article for which I am looking?

ExLibris	LIBRARY SEARCH	JOURNAL SEARCH	FETCH ITEM	TAGS			Ð 🕴	Jean Dill 🔻
Using cognitive strategies	s overcome	es cognitive	e load in onl	X ∕ Art	icles 🔻 뵞	Q	ADVANCED SEARCH	
No records found There are no results matching	your search	"Using cogni	tive strategies	sovercomes	cognitive load	in	Refine Results	5
online learning environments Suggestions: • Make sure that all words	". are spelled o		uve strategies	overcomes	cognitive toad			
 Try a different search so Try different keywords. Try more general keywo Try fewer keywords. 								

Expanded search includes the article, but it's 'No Online Access'

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Using cognitive strateg	ies overcome	s cognitive	load in onl	l 🗙 / Arti	cles 🔻 🤇	م (ADVANCED SEARCH				
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Using cognitive strategies overcomes cognitive load in onl X / Articles - U ADVANCED SEARCH											
These search res	sults do not includ				e collection of	-					

Activate the collection/portfolio, confirm the coverage dates

	Electronic portfolios Keywords Interactive Tec	hnology and Smart Education	X Lt Q	Advanced •	
» F	Electronic Portfolios (1 - 20 of 32) where (Keywords contains keywords "Interactive Technology and Sm	nart Education" AND Interface Name contains keywo	ords "proquest ")		
Facets	A Institution				
	Sort by : Rank -			₿.	\$
	1 Interactive technology and smart education ProQuest Central UK/Ireland: getFullTxt ISSN: 1741-5659 Available from 01/01/2006. Most recent 1 year(s) available.	Electronic Material Type: Journal Creation Date: 06/08/2019	Activate Portfolio ID: 534960000000649007 Service ID: 624960000000000430 Collection ID: 61496000000000434 MMS ID: 991000000000238464	Linking Information	•••
	2 Interactive technology and smart education Engineering Collection: getEullTyt	. 1 of 2 >	Activate	Linking Information	•

Expanded search doesn't include the article either

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No records found							Refine Res		ılts
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Suggestions:									
 Make sure that all words Try a different search so Try different keywords. Try more general keywords 	ope.	orrectly.							
• Try fewer keywords.									

2. It's active in CDI and Alma, why can't I see it yet in the discovery system?

ExLibris		LIBRARY SEARCH	JOURNAL SEARCH	FETCH ITEN	I TAGS	COLLECTION DISCOVERY						
	chocolate and health											
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The EasyActive Collections List in the Knowledge Center

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4	ARTstor			ARTstor										Full Text Colle	ection					
5	Biodiversity	Heritag	e Library	Biodiversi	ty Herita	age Libra	ry							Full Text Colle	ection					
6	BTJ			ArtikelSök	¢									Abstracting an	nd Indexir	ng datab	ase (A8	d)		
7	CAB Interna	ational		CAB Abstr	acts Sur	nmon Pil	ot							Abstracting an	nd Indexir	ng datab	ase (A8	վ)		
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EasyActive Collections List



3. When I click on the full text link, I'm prompted to log in

ExLibri On pers	TOP SEND TO VIEW ONLINE	and action Rose, Diana Social Theory a	& Health, 2020-0 ge in survivor res e Limited 2019 A ED	96, Vol.18 (2), p.11	10-122 Diana Rose1 Pul	survivor resear blished online: 12 F ting		*	
~	DETAILS LINKS TAGS CITATIONS	EXPORT BIBTEX	EXPORT RIS	ENDNOTE	EASYBIB	RW REFWORKS	PRINT		
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Check the service-level proxy in Alma

lectronic Servi	e Editor	Cancel Save
Linking level	Article	
Linking level (override)		-
Service is free?	Not Free	
Service is free? (override)	O Not Free O Free	
ossref supported	No	
ossref supported (override)	Ves No	
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Check the linking parameters in Alma

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Number of portfolios	84											•
portrollos												

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Check the linking parameters in Alma

See <u>Library-Specific Parameters table</u> in the Managing Electronic Resources documentation for details regarding linking parameters

Collection	Parameters	Explanation
ABC CLIO Databases	USERNAME PASSWORD	An ABC representative can provide you with your user name and password.
CCC (Copyright Clearance Center) service	BILL, ID, INST, MAIL, and SOURCE	 A CCC representative can provide you with the details for each of the following linking parameters: BILL - The email address used for billing. MAIL - The email address used for sending an article. SOURCE - The university system code, which is provided by CCC.





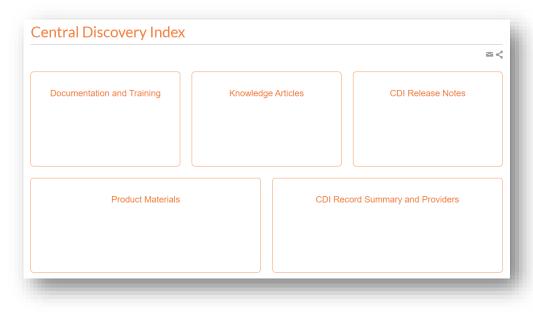
Resources



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Documentation

<u>Central Discovery Index</u>



- Go VE: Overview Move from Primo Classic to Primo VE
- Fully Flexible to EasyActive



Thank you!





