



# **Central Discovery Index (CDI)**

Presented by:

Shira Cohen

Technical Support Team Leader

## Agenda

What is CDI?

How is availability determined?

How can you control availability?

How Does CDI Activation Affect Search Results?

Troubleshooting





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### 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











#### Content loaded into CDI

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Search anything				م	ADVANCED	SEARCH	
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How does this work?			Where ca	an I get hel	o?		
Primo provides simple, one-stop searchin videos, articles, digital media, and more.	g for books and e-bool	ks,	Ask a libraria	an how to start	your search		
Primo also helps you manage your researd Renew books and videos Croate favorites lists	:h. Sign-in in order to:		Question	ns? Comme	ents?		
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when you re signed in.)							











#### Content loaded into CDI

#### Patrons search index via Primo VE/Summon

**Receive results** 

#### Access full text via links



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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	file Details	Cancel	Save
Resources	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		
Tiscovery		Publishing Paramet Status Scheduling	ers 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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User Role 1 - 6 of 6	s			Electronic Inventor activate/deactivate e	<b>ry Operator/Extended:</b> Able to e-resources, add local electronic
	Active	▲ Role Name	🕈 Role Area	collections and port	folios, and create and manage
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		Electronic Inventory Operator	Inventory	inventory as wen.	
		Electronic Inventory Operator Extended	Inventory	<b>Repository Manage</b> create/remove block	<b>er:</b> Able to add/edit/delete note ks, manage inventory operators,
		Repository Manager	Inventory	assign e-resource ac	ctivations to operators, manage
				inventory and repos and link inventory in	itory jobs, and add/edit/delete the MD 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







### 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: CDI Search Scope**

You can specialize the CDI search scope and limit the scope results.

• Filter by Availability -display only CDI records that have full text

< Define a Custom Search Profile												
	Search Profile Details										v	~
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	List of Scopes included i	in the Sear	rch Profile								v	~
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	2 MyInstitution	My Ins	titution	All records belonging to your institution						Remove		
										Edit Resource Type se	election	
										Edit Discipline selecti	on	
_										Edit FT search config	uration	

Configuration > Discovery > Search Configuration > Search Profiles





#### **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 With the "Activate for Full Text in CDI only" settings.

- 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







#### **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

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#### **CDI Activation Analysis Tool**

#### https://cdi-rights-analysis.hosted.exlibrisgroup.com/client/create

CDI Activation Analysis												
New   Help												
Execution Det • Library : 1 • Record : c • Status : Co CDI Results are c	tails LS_USB.PPRD di_gale_infotracaca omplete due to the following	demiconefile_A680774	863									
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AAYXX	CrossRef	CrossRef	DBID	-	No	Search Only	No					
SES	Elsevier	ScienceDirect Journals (5 years ago - present)	Title	-	No	Search Only	No					

CDI Tips and Tricks page from the Customer Knowledge Center





### Availability calculation - Brief vs. Full Display

- **Brief Display**: the record is available online based on the Alma electronic holdings file.
- **Full Display:** availability is based on Alma inventory, if there are electronic, digital, or physical services.
  - Same calculation with Primo Services page





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

ExLibris	LIBRARY SEARCH	JOURNAL SEARCH	FETCH ITEM	TAGS			3 🖡	Jean Dill 👻
Using cognitive strategie	s overcome	s cognitive	load in onl	× / Arti	cles 🗸 🏓	Q	ADVANCED SEARCH	
No records found							Refine Results	
							Expand My Results	
There are no results matching online learning environments	; your search ' ".	'Using cogni	tive strategies	overcomes	cognitive load	in		
Suggestions:								
Make sure that all words	s are spelled c	correctly.						
<ul> <li>Try a different search sc</li> <li>Try different learner</li> </ul>	ope.							
<ul> <li>Try different keywords.</li> <li>Try more general keywords.</li> </ul>	ords.							
<ul> <li>Try fewer keywords.</li> </ul>								





#### Expanded search doesn't include the article either

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Using cognitive strategies	overcome	s cognitive	load in onl	× / Arti	cles 🔻 뵞	م	ADVANCED SEARCH	
No records found There are no results matching y online learning environments" <b>Suggestions:</b> • Make sure that all words • Try a different search sco • Try different keywords. • Try more general keywor • Try fewer keywords.	your search " are spelled c .pe. ds.	'Using cogni orrectly.	tive strategies	overcomes	cognitive load	in	Refine Results	5
<ul> <li>Try more general keywor</li> <li>Try fewer keywords.</li> </ul>	ds.							





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

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#### Activate the collection/portfolio, confirm the coverage dates

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l	2		Interactive te	chnolo	gy and smai	rt education.	<	1 of 2	Naterial Type:	Journal	Portfolio ID	Activate	Linking Info	ormation	





#### Expanded search: article has 'No Online Access' but in the Full Display, the status changes to 'Available Online'

International Group of Ex Libris Users

Part of Clarivate

ExLibris		LIBRARY SEARCH	JOURNAL SEARCH	FETCH ITEM	TAGS			3			Jean Dill	•				
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#### Collection is active in CDI and Alma, but the record has "No Online Access"

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					2	Digital Commons @ U Type: Selective package Service: Full Text Interface name: Universi	Iniversity of Nebraska -   ty of Nebraska - Lincoln	Lincoln In C	24 in CDI: Free scription (Linkresolver)		Portfolio List (38	8552) Activa	vate ***





### Possible reasons for Availability Issues

- The option "Do not show as Full Text available in CDI even if active in Alma" is set to True.
- The record comes from an aggregator/selective package, and the setting "**We subscribe to only some titles in the collection**" is set to No.
- Display Logic Rules
- Holdings Files information is incorrect
  - Analysis Tool: Access Rights
- The CDI metadata is incorrect, OR Alma CZ info has an incorrect identifier
  - OpenURL: metadata





**Brief**: Unavailable **Full**: Available Online



#### How to extract metadata from the OpenURL?



#### **Availability Issues- troubleshooting summary**







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







#### Check the service-level proxy in Alma

Liectionic Servi		Cancer Save
Linking level	Article	
Linking level (override)		•
Service is free?	Not Free	
Service is free? (override)	Not Free	
Crossref supported	No	
Crossref supported (override)	🔘 Yes 🔘 No	
Crossref enabled	O No O Yes INHERIT	
Proxy enabled	No O Yes	
Proxy selected	· ·	
ink Resolver Plugin		~
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1 CLIENTID		





#### Check the linking parameters in Alma

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Alternative title								
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Proxy selected			-					
Language			-					
Category								
Category Additional descriptive information	Select from a lis	t	:=					

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





#### Check the proxy settings

For **Link In Record** linking method, check the Use Proxy settings on the Discovery level.

- Primo VE: Discovery > Other > Central Index and proxy set-up
- Primo: Back Office > General > Institutions List > Delivery Base URLs > EZproxy

Central Index and proxy set-up	Delivery Base URLs:
Registration	MetaLib Reset Access Authorizations Test Connection SFX
Search Configurations	ILS Alma Rosetta
Use Proxy	Alma Services Page URL Digital Repository
CDI Proxy Default ( currently: EZProxy )    Proxy Configuration	Digital Repository 2 Digital Repository 3
Proxy Settings 🛛 🗹 Use proxy for CDI links	API Test Connection
Use proxy only if the user is off-campus	EZproxy Use EZproxy Do not proxy Open Access records
Do not proxy Open Access records	DB Category V





#### Full text link leads to an incorrect target







#### Linking issues

- If the linking method is Link In Record- open a case to the Discovery team
- Link Resolver method:
  - Ensure the metadata is correct
  - Check the portfolio's linking information







## Resources





#### **Documentation**

#### • <u>Central Discovery Index</u>











We hope you enjoyed our presentation as much as we did!

#### Please fill out this short survey:

## Thank you!

Shira Cohen Shira.Cohen@Clarivate.com



https://www.surveymonkey.com/r/WVCDY6S

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40

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