



Content Quarterly Webinar Best Practices for CDI

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Agenda

- Content: Back to Basics
- Discovery Ingestion Best Practices
- Delivery and Discovery Interoperability

- Collection Types and How they Work
- Best Practices:
 - Rights
 - Linking



Content Back to Basics

- **KB (SFX, Alma, 360)**
 - Title level metadata
 - Electronic Resource Management tool
 - Link Resolver
 - Includes collections (aka provider offerings)
 - We receive from the providers KBART, MARC (format and MD not always standardized)

- **Index (CDI)**
 - Article level metadata
 - Includes rich records: authors, subjects, abstract, full text, etc. (legal agreements)
 - CDI content is optimized for keyword search (Discovery)
 - Local catalogs for Summon clients
 - We receive from the providers XML, MARC (format and MD not always standardized)

Content in Numbers

Three KBs

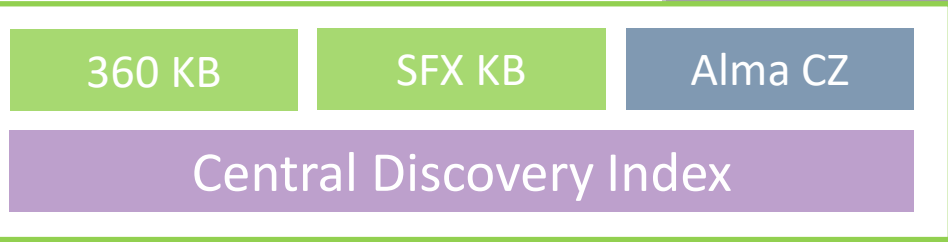
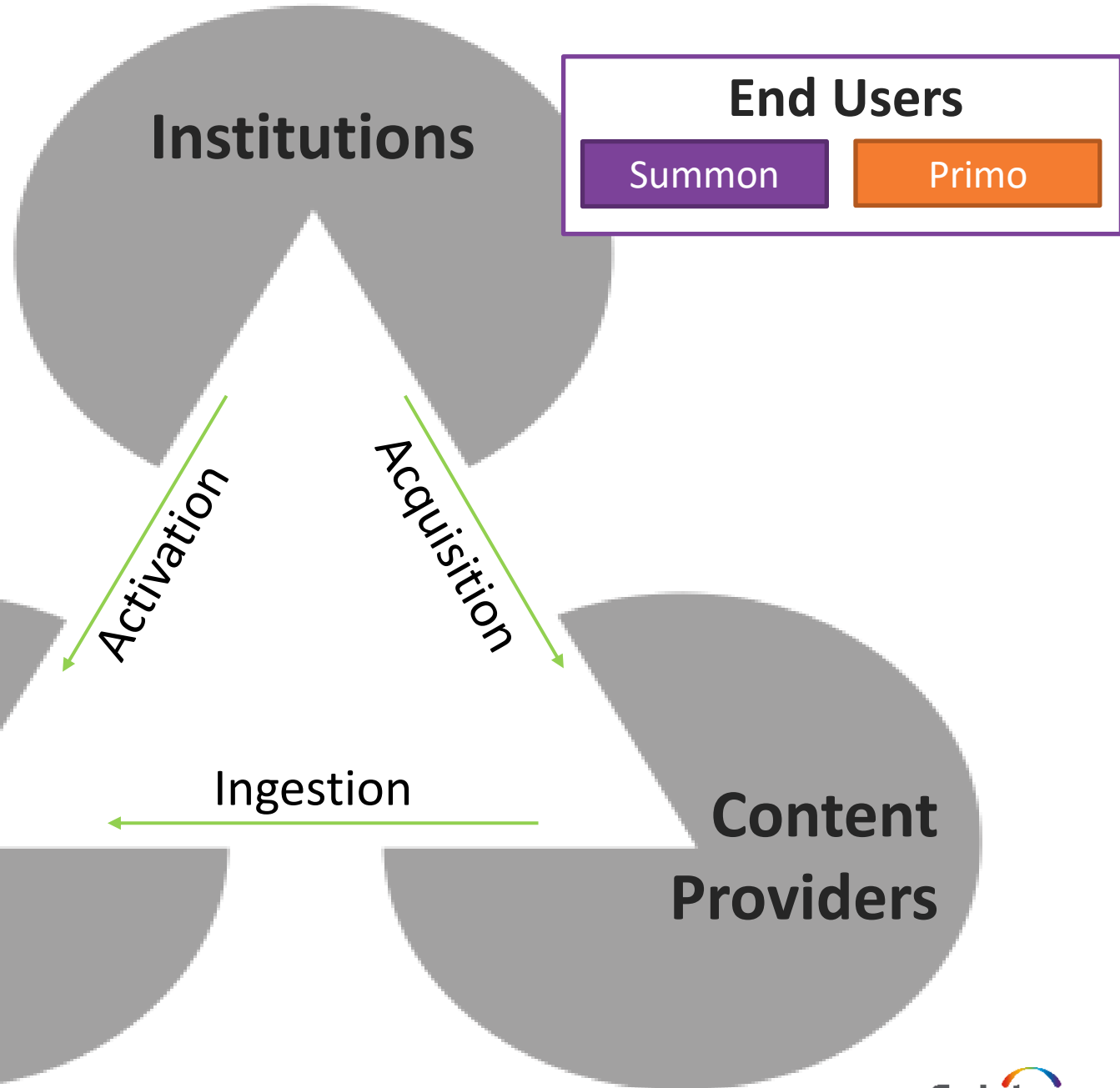
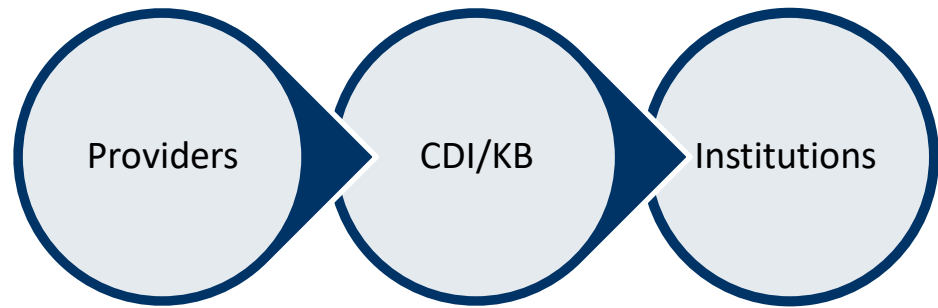
- Over **58,000** collections
- Over **70 million** holdings

One Index

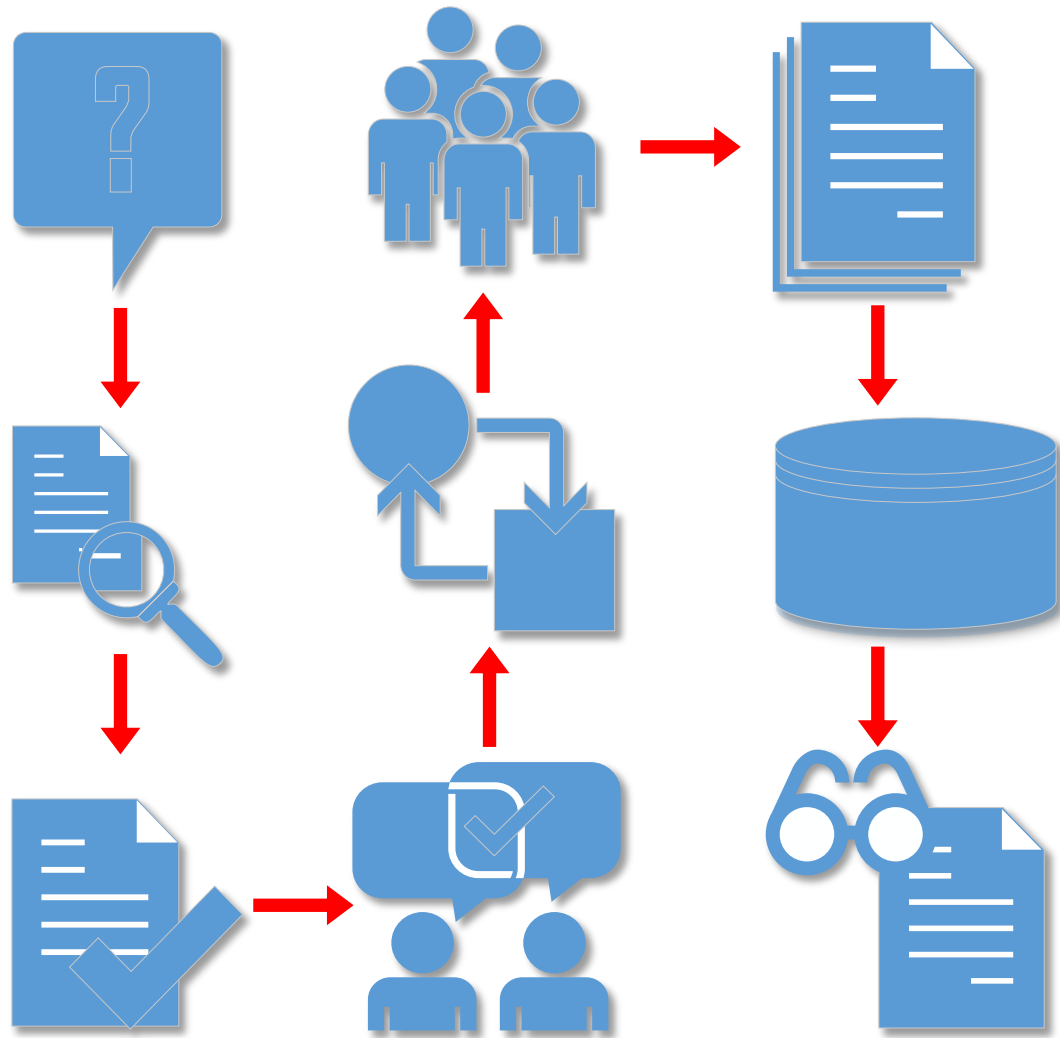
- **4.2 billion** records
- **10%** annual growth



Working together

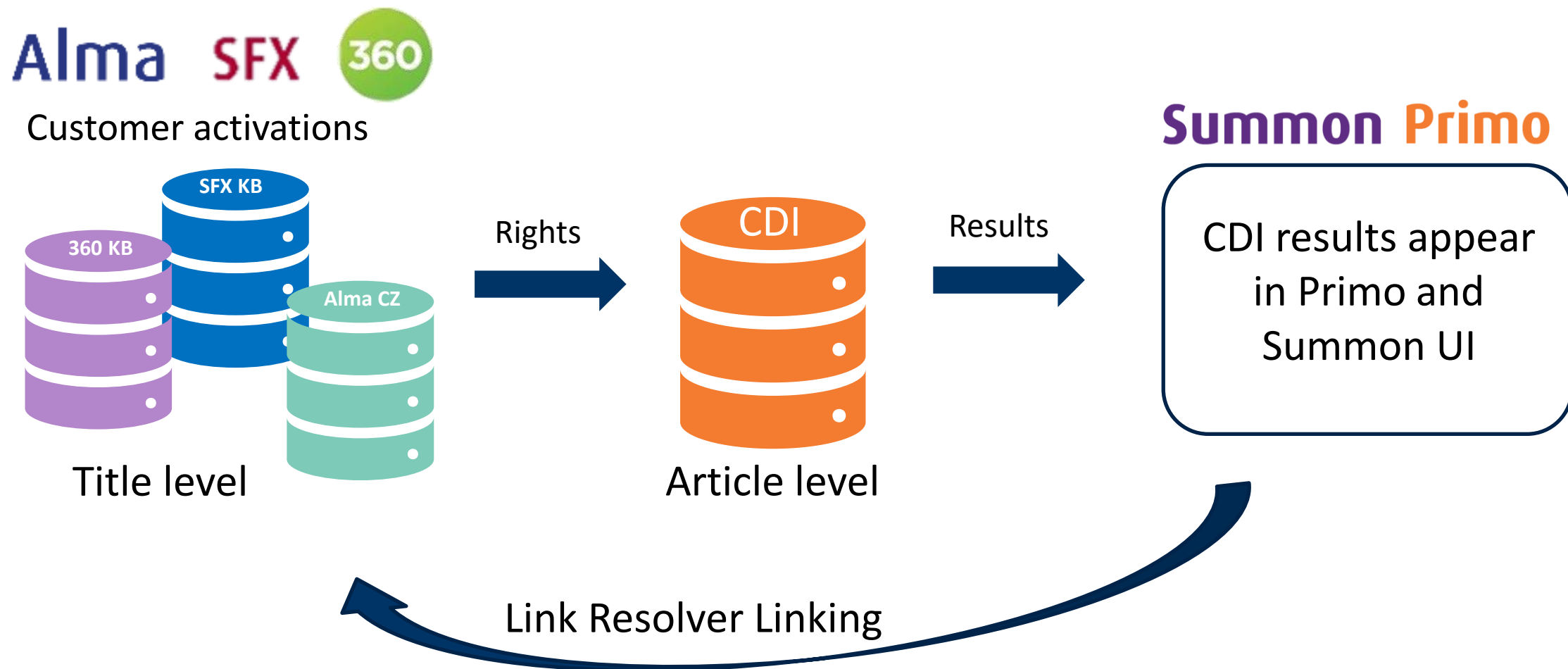


Discovery Ingestion Best Practices



- 1) **Identify** new content to add to CDI
- 2) **Review** and evaluate sample content
- 3) **Approve** sample content
- 4) **Sign** data-sharing agreement
- 5) **Acquire/deliver** full content set (by provider)
- 6) **Normalize & map** data
- 7) **Configure Linking and Rights**
- 8) **Load** data
- 9) **Maintain & support**

Delivery and Discovery Interoperability



perseverance



Articles



ADVANCED SEARCH

Sign in to get complete results and to request items



Sign in



DISMISS



0 selected

PAGE 1

483,419 Results



Personalize



Tweak your results

Expand My Results

Sort by Relevance

Availability

Available online

Peer-reviewed Journals

Open Access

Subject

Resource Type

Collection

1



BOOK

Perseverance

Braukman, Jay

2020

“ The second book by Jay Braukman describes his experiences and roles at several public companies after he left a twenty-three-year career at GE. Follow as he... ”

[Available Online](#)



2



BOOK

Perseverance

Jack, Bill

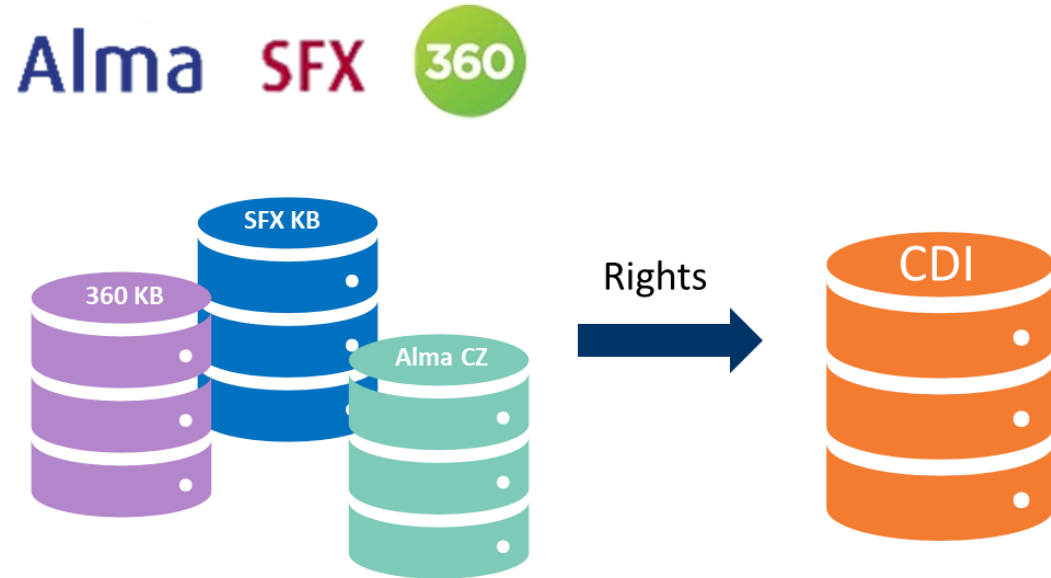
2019

“ From Bill's perseverance, a reader may be inspired to continue pursuing dreams, even when there are enormous disappointments... ”

[No Online Access](#)



CDI Rights



Rights are calculated per institution, per record, based on KB activations

Title-Level Rights:

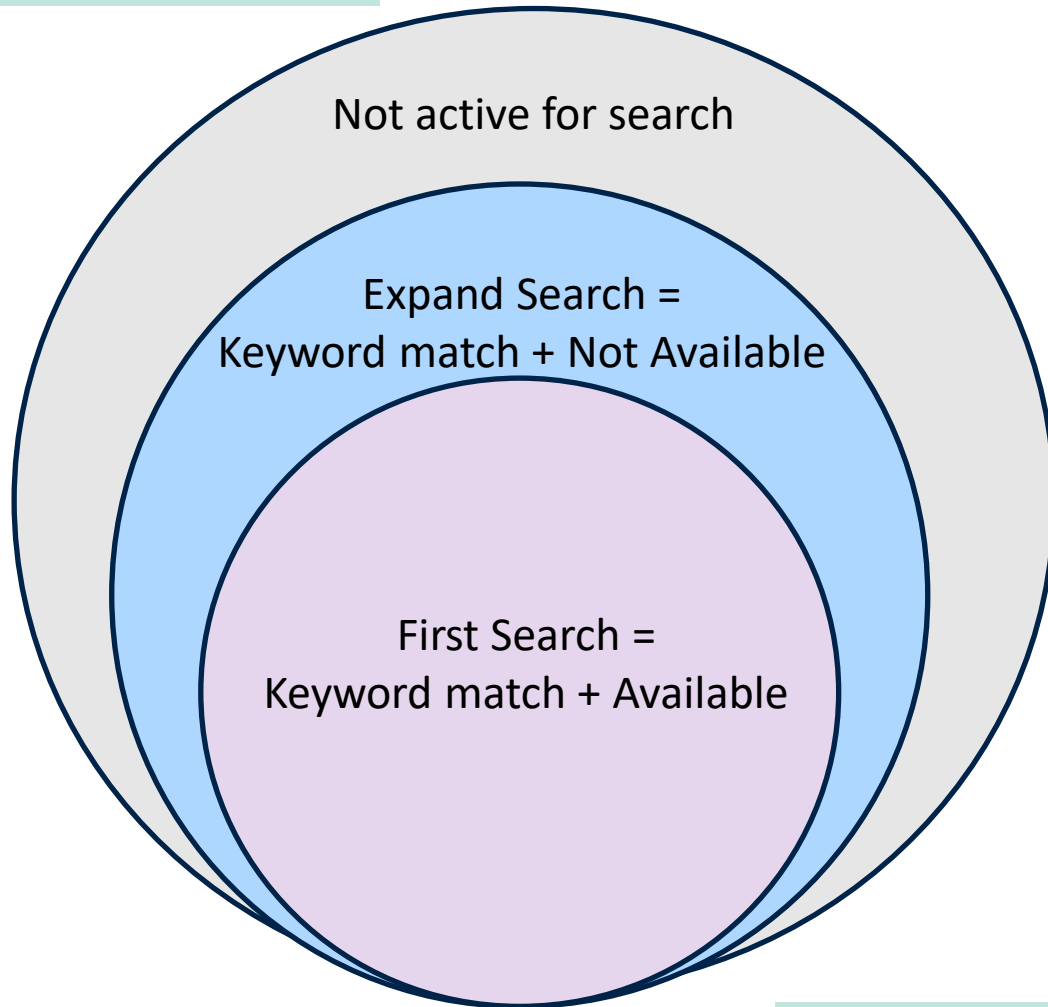
Based on identifier match between the KB activations and the CDI records

Collection-Level Rights:

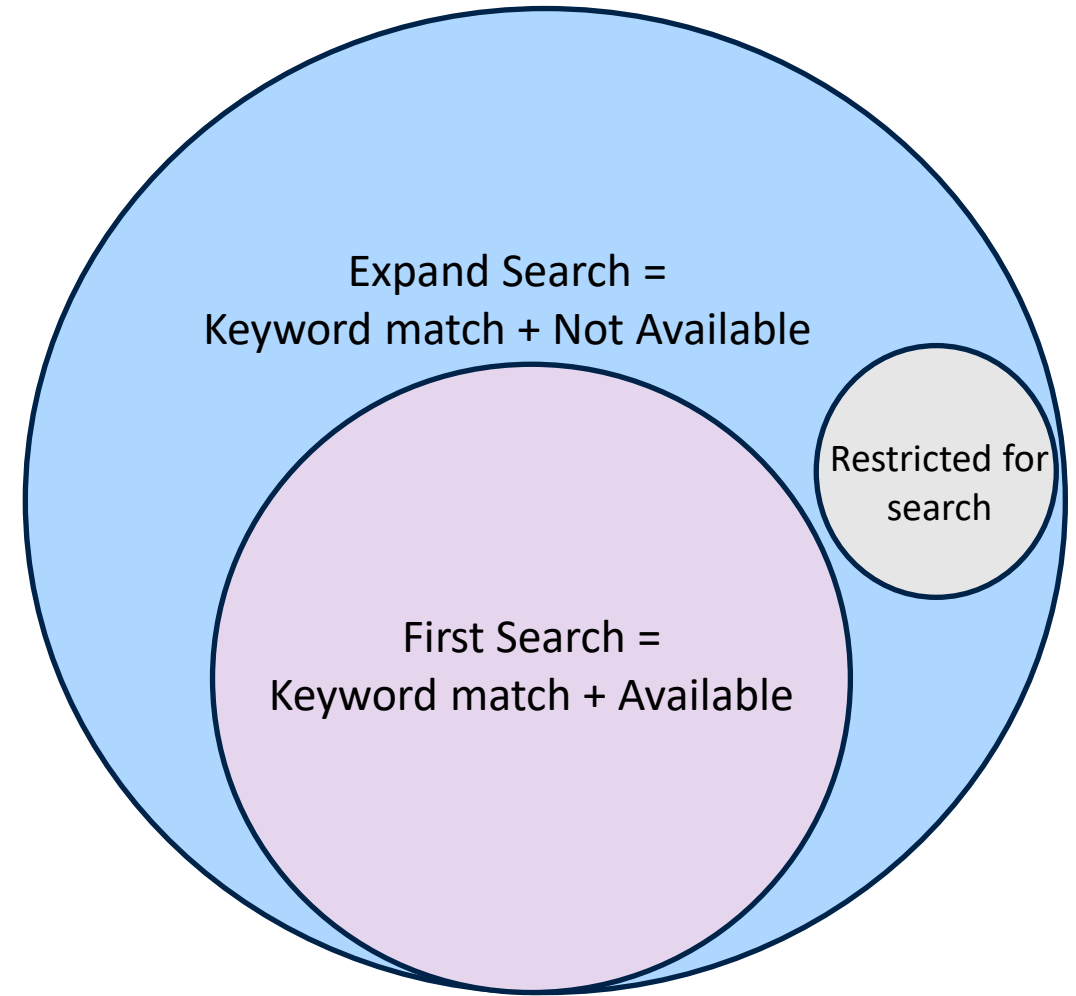
Based on collection identifier (DBID), in the KB and in the CDI records

Fully Flexible

“Active for Search”



Summon and Easy Active



Results are from all metadata sources,
including alternative coverage

CDI Collection Types

OA

Full Text Collection

Database
Collection level rights
Link In Record

Full Text Collection

Selective / Aggregator
Title level / Collection level rights
Link Resolver / Link in Record

A&I Collection

Database
Link Resolver

Hybrid A&I Collection

Database
Hybrid Rights and linking

Best Practices for Rights

- **Full text activation** is also Search activation
- **“We subscribe to only some titles in this collection”** - Y/N
 - Link in Record collections with portfolios: No (collection level rights)
 - Link Resolver collections: Yes (title level rights)
- **“CDI-only full text activation”** available in Link in Record and A&I collections
 - Collection level rights
 - Use to activate for FT in CDI and not publish to Discovery the collection’s Bib/portfolios
- **A&I collections**
 - Activate like a FT collection
 - Records will show as FT when matched to other FT collections
- **Search Rights** - Free/Subscription
 - “Subscription” when provider requires a subscription to view the records

Best Practices for Linking

- **OpenURL linking (Link Resolver)**
 - For Selective, Aggregator and A&I collections
 - We use platform-specific document ID where available
- **Link In Record**
 - Where OpenURL is not possible, or record is unique and available from only one platform
- **Primo LinkTemplate**
 - Where the provider requires authentication with specific parameters in the link
- Read more: [Supported Linking Methods](#)

A&I and Hybrid A&I Collections

- A&I collections offer metadata and not Full Text
- Records will appear as “Full Text Available” if they match to other activations
 - For example – Web of Science record will have link to ProQuest
- Hybrid A&I collections
 - Part of the records have direct links to FT
 - We plan to maintain one collection where possible, and have the records with FT appear as available with direct link, and the A&I record behave like classic A&I

Thank you!

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