CDI and Linking to Electronic Full Text

General

Ex Libris provides the best possible service to its users when creating and presenting links to electronic full text in our discovery search results. Our systems do not have any bias towards or against any content provider, neither in the way content is indexed nor the way our ranking algorithms work, or which links and in their order are presented to the users.

Primo and Summon use different methods to link to electronic full text. The design and technical differences are historical, as both products were initially designed and created by software developers within different companies. When moving customers to the Central Discovery Index (CDI), from the original Summon index and Primo Central, the original and supporting linking technology was maintained to prevent disruption and ensure customers' preferences.

Both services enable libraries the opportunity to configure the presentation of links to electronic full text. More information and details are provided below.

Primo

Supported Linking Methods

The linking in CDI works very similar to how it works in Primo Central. Collections continue to use the same linking methods. Primo supports the following linking methods, which are set at the collection level:

- **OpenURL linking** – Full-text linking is handled by the link resolver (Alma/SFX) and the library determines which links to display and their order. Where possible, Primo will add a platform-specific document ID to the OpenURL. This ensures reliable linking with high success rates, by allowing the link resolver to use that ID to link to the full text instead of using metadata to create the link.

  OpenURL linking is used for approximately 60 percent of the collections indexed in CDI. Collections that use this method include primary publishers and

collections that contain mainstream material, such as articles and books that may be available from more than one platform.

- **Link in Record** – 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, Primo will use the information provider stored link in the CDI record.

  This method is used for approximately 40 percent of the collections. Some of the collections that use this method include video collections (such as Alexander Street Press), reference collections, or those that contain special and unique material.

- **Primo LinkTemplate CDI collections** – This rarely used method is used for collections where the linking method is the link in the record in which the provider requires Primo to add customer-specific parameters stored in Primo's linking templates to the URL. Such collections include Naxos and Kanopy.

Direct Links

The term "Direct link" is often used in different contexts for different things. If not otherwise indicated, we use it to describe links that use the document ID of the original platform instead of metadata to link to the full text.

Direct links are often more reliable than using metadata links. Direct links can be either links in the records (which are provided by the platform as part of the CDI data delivery) or links created by the link resolver if the OpenURL contained the document ID for a platform to which the user has access.

Primo adds this document ID to the OpenURL for several collections, including Gale, Ingenta, and ProQuest and for primary publishers using a DOIs as a document ID. Both link resolvers (Alma and SFX) have functions that give preference to direct links over metadata links (if both are available) to increase the accuracy of linking. This setting is locally configurable, with details noted below.

OpenURL Linking with Alma and SFX

Alma and SFX have default settings to prefer direct links, over links created with metadata, to increase the success rate for users. Otherwise links are by default listed alphabetically by platform provider. Customers can:

- Change the order of platform providers according to their preferences
- Disable the direct link preference setting
- Set conditions for links to appear or not to appear, e.g.

    - hide open access if full text exists
    - hide full text if open access exists
    - deduplicate links to the same provider platform
    - exclude providers against each other
- Opt to display services for related electronic resources
- Opt to display license terms/Access Model
- Create their own custom link services

Customers can also choose to enable DOI resolution.

Linking and the Merged Record

All records that contribute to a merged record usually use either the link resolver or the link in the record. There may be cases where items from a collection using the link resolver are merged with records using the link in the record. The possible scenarios and their linking behavior are:

- **All records in a merged group are coming from collections using the link resolver** – The merged record will use the link resolver (Alma/SFX), where the library manages the settings for the number of links displayed, the order of the links, and other priority settings.

- **All records in a merged group are coming from a collection using the link in the record** – Typically, an institution has access rights only to one of the available platforms and the links to those platforms will be displayed and used. If an institution has access to several platforms, the system will give priority to collections with the most reliable link, which will be the direct link (using a document ID from the provider platform) if its available.

- **One or more of the records in a merged group is coming from a collection using the link resolver, and others come from collections using the link in the record** –
    - If the library has no access to any of the collections using the link in the record, the merged record will use the link resolver.
    - If the library has access to at least one of the collections that use the link in the record, and that link is not for an open access item, those collections will be given precedence over the collections that use OpenURL. Links that use a document ID will be given priority over metadata links. If the "link in the record" collection is open access, then the OpenURL link will be given precedence.

Summon

Supported linking methods

Summon leverages two different linking methods.

IEDL (Index Enhanced Direct Linking) – More than 50% of links in Summon are created by IEDL. IEDL creates direct links using document specific IDs that are provided as part of the metadata from content providers. IEDL applies rules to clean and create the links and stores them in a central database. Rules, for example, determine whether or not to use the link provided, how to create a link with a specific document ID, and so on. IEDL provides links to the user based on what the library activated in their 360 Core (Client Center) or Intota. If the customer has rights to the same resource on several platforms an IEDL links is chosen randomly.

OpenURL Linking - For items where no IEDL link can be provided Summon uses OpenURL linking via 360 Link, creating the link with bibliographic metadata. 360 Link provides customers with configuration options to determine the order of links. Similar to IEDL, 360 provides links to the user based on what the customer activated in 360 Core (Client Center) or Intota.

By default, Summon gives preference to platforms whose content can be accessed via IEDL since this technology ensures the most accurate linking.

- If multiple platforms support IEDL for the same resource, by default the Summon service selects one of the platforms randomly.
- This default can be overridden if the customer configures a linking priority order in the Summon Administration Console.

For OpenURL link resolution 360 Link customers can configure preferences in the following ways:

- to follow an order of provider platforms they define
- to prefer HTTPS targets
- to deduplicate article links from the same provider, or across all providers
- to include Crossref links always/only when there is no article link/never
- to enable DOI resolution