The Ex Libris Central Discovery Index (CDI) – An Overview

Background

Ex Libris continues to execute on its strategic plan for accelerating discovery product innovation, enhancing operational excellence, and improving customer experience. Over the past years, since Summon joined the Ex Libris organization, we have further enriched both Summon and Primo with new features, and unified content, cloud, and support operations under one organization. As a result, we have been able to create a more agile operation, introduce new services, and enhance product performance, across both products.

Our discovery environment is changing significantly with an increasing amount of new material and material types becoming available. New ways of discovery, beyond just the one result list option, need to be supported to enable users to find the resources they need in indexes that are now far beyond the three billion records bar. We introduced over the past years new features to support discovery not only with searching but also exploration and learning. In the future we will continue to enhance such areas by creating data relationships that enable us to release more exploration paths and smart discovery services.

As part of our discovery strategy to meet user and customer expectations in the coming years, we are creating a unified index, leveraging our existing assets. The Ex Libris Central Discovery Index (CDI) is a central and unified index, with an upgraded infrastructure, that will support both Summon and Primo. With this move, we will be able to deliver an even more robust content index and expand the services that leverage it. Both Primo and Summon customers will benefit from faster update cycles, better capacity for ingest, enhanced ranking algorithms and a separate database to store material relations.

At the same time, we fully recognize our customer’s choices in which discovery system is the best fit for their organization and we continue to support both Summon and Primo as our flagship discovery products, with dedicated roadmaps for both products.

For additional information, see CDI Frequently Asked Questions for Primo Customers.

What Is CDI?

CDI is a central discovery index – leveraging existing assets - that supports both Summon and Primo and delivers enhanced discovery, streamlines library management, and provides operational efficiencies. CDI will replace the Primo Central Index and the Summon Index to give access to Ex Libris provided data. The ingestion of local data will continue to function as before.

What Are the Key Benefits of the CDI?

- Increased scalability and an improved infrastructure that is designed to address future challenges
  - Expanded content coverage
  - Continuous content enrichment and focus on data quality
  - Continued content neutrality
Granular resource types

Enhanced performance

- Enhanced operational efficiencies for our customers, content partners and Ex Libris

  - For customers:
    - Single activation to publish content to users
    - Faster content update cycles (including new content)
    - Daily rights update for all customers (electronic holdings)

  - For content partners and Ex Libris:
    - Data delivery and ingestion into one index
    - Streamlined problem resolution
    - Single-system monitoring (Ex Libris)

When Will CDI Become Available?

The development and move to production is planned to be finalized by mid-2019. A majority of customers will benefit from CDI in 2020, while some of our customers will be able to take advantage of it by the end of 2019.

The general timeline is as follows:

- Select Primo VE/Primo Alma customers: starting in Q3 2019
- All Summon customers: starting in Q3 2019
- All Primo VE and Primo/Alma customers: starting in Q1 2020
- All Primo/SFX customers: starting in Q2 2020

The project is planned to be concluded by the end of 2020.

The CDI is being designed to ensure a seamless and smooth adoption for all customers, including automatic transfer of all activation settings at the time of the move.