CDI Frequently Asked Questions for Primo Customers

For more information about the Central Discovery Index (CDI) and the resource types used by CDI, see the following pages, respectively:

- The Ex Libris Central Discovery Index (CDI) – An Overview
- Resource Types in CDI

What will change for users with CDI?

In the move to Central Discovery Index (CDI) the changes for the users will be kept to a minimum to not cause any disruptions. However, we also want to improve user experience with this change. There are in particular two improvements that become available when moving to CDI, the switch from the grouped to the merged record and the of more granular resource types (see Resource Types in CDI).

Merged Records Instead of Record Groups

In Primo Central we index records that come from different content providers. If the systems find several records for the same item, these records are matched and grouped. Users see in their result list one record, they can click on an "All versions" link to display the entire list of records in a group. In CDI we will be moving to a merged record. The advantage is that merged records are more intuitive for users than the groups. All data from of the source materials are indexed, and the best record according to the source type is displayed. In addition, we provide value-add features such as journal authority information, authoritative Ulrich's peer-review data to create a single, rich, CDI record. CDI will adopt the same process for merging records that Summon uses today. For more information, see Summon: Origin of Summon Records, and Match and Merge.

Note

Local records will not be merged with records from CDI.

What will change for librarians with CDI?

With the move to CDI we are also moving to single activation in order to simplify your activation processes. That means that you will be able to activate your collections in one place – Alma or SFX – and they will become searchable in CDI. Your current activations on your Primo Central institutional profile will be moved automatically to your respective Alma or SFX back offices. In addition we will be offering an EasyActive setting that is described in more detail below. This setting benefits particularly libraries who do not want to maintain their activations themselves and would prefer a more automated process to make sure their patrons do not miss out on content they are subscribing to.

Will I have the same flexibility as today with single activation from Alma and SFX

Yes, you will have the same flexibility in activating collections for search as you have today. We update CDI with the
settings that you have at the time of the move. You can determine which collections are visible to your users, and which are not. In addition we are adding the option to turn collections on only for search but not display their content with “fulltext available”, even if the linking and availability flag is set on collection level. This was not previously possible on your Primo Central activation profile. For example, in Primo Central, the Alexander Street Press collections appear with full text available on the user interface if you activate them for search. With CDI you can activate them for search, but not flag them as full text available. This is an advantage for users who want to see everything that is searchable, even if it is not available via the library. In addition, we are adding the optional EasyActive setting for customers who would prefer not to manage all their activations themselves.

What Is the EasyActive setting?

With CDI you can either continue to use the FullyFlexible setting described in the answer to the Will I have the same flexibility as today with single Activation from Alma and SFX question or move to the new EasyActive setting. The FullyFlexible setting does require the library to manage all their activations themselves, on an ongoing basis, including for collections used for alternative coverage of providers that are not directly indexed in CDI. The EasyActive setting activates the majority of collections automatically without library intervention. The full text availability settings are controlled by the library’s activation in their respective Alma and SFX back offices. From the library patron’s perspective that means that results returned in the expand beyond the library collection search can come from any collection in CDI (with some exceptions), while the default search (provided you are using the filter to only show items that are flagged as fulltext available in the default search) will only return what is active for full text availability. This setting has the advantage that all of the library’s subscribed content is discoverable immediately, the library still maintains control over what content is flagged as fulltext available to their users.

Which collections are not automatically active in the EasyActive setting?

Excluded from this setting are subscribed A&I databases and collections that have content that is only relevant for very specific regions or institutions. We will publish a list of those collection in due course.

What is the update frequency of my "Full Text Available" settings in CDI?

The update frequency to your full text available settings in CDI will increase to appear within 48 hours after a change was made. The same frequency applies if you active or deactivate a collection for search. The frequency of updates to your local data, for example your catalog from Alma, remains the same.

I am using the APIs to retrieve content from Primo Central. Do I need to change anything when moving to CDI?

No, you do not need to make any changes. Your API queries will work as before.

How and when will my institution move to CDI?

The move to CDI will be seamless. We will switch your institutional activations as they appear today on your Primo Central institutional profile to CDI and redirect your Primo environment to CDI. Your activations will become visible on your respective Alma and SFX Back offices and can be managed from there. There is nothing required from the institution to do. If you wish to review your activations before the move you can of course do this but it is not required. The move for the majority of our Alma customers will happen in the first half of 2020, for SFX customers in the second half of 2020.
Does CDI have the same content as Primo Central?

CDI will have the same content and more. Since we have some different collections in Summon and Primo Central users of CDI will enjoy the combined content of both indexes. We will publish more information about the content included in CDI at a later stage.

Does CDI support Alma multi-campus configurations?

Yes.

How do I view CDI-related webinar recordings?

- Ex Libris Central Discovery Index: Overview and Update (May 29, 2019) – [YouTube video](#), [WebEx recording](#), or [PDF file](#).

- The Match & Merge Story: Improving Search Results, Reducing User Confusion (Sept. 12, 2019) – [YouTube video](#), [WebEx recording](#), or [PDF file](#).

If you have any questions or feedback about CDI please send an email to [cdi_info@exlibrisgroup.com](mailto:cdi_info@exlibrisgroup.com).