Central Discovery Index (CDI) - Cheat Sheet and Activation Matrix

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Created on: 4/28/2020

This is a shortened version of my local documentation, shared to assist the international community to transition from the Primo Central Index (PCI) to the Central Discovery Index (CDI).

My own testing is ongoing to clarify key points, as stymied by many identified defects where outcome in Primo does not match settings in Alma, or in OLH documentation, and well as ongoing flux by Ex Libris taking into account our feedback and adding new settings, as well as bodies of work to improve metadata, such as addition of missing DBIDs

As such, I accept no responsibility for use of this information, and welcome your feedback if you feel I've gotten something wrong (contact details at bottom).

Edits: Now updated to incorporate August 2020 Release changes (both CDI and Alma) 16.8.2020

See my other CDI CKCs for additional information

- How to - Find Central Discovery Index (CDI) records for specific collections in Primo
- Central Discovery Index (CDI) - Test Plan and identified issues log
- CDI Electronic Collection Matrix - Mapping Alma settings to Primo outcomes
- How to - Access and open your Central Discovery Index (CDI) Institutional Holdings File
- PCI to CDI - A comparison of FRBR grouping and Match and Merge
- Central Discovery Index (CDI) - Troubleshooting Tips and Tricks

CDI Records in Primo - Searchability and Availability
• **Searchability and Availability**
  ◦ Searchable and Available records - **Available online**
    • These are discoverable and full text available in both our filtered search and our expanded search
  ◦ Searchable records - **No full-text**
    • These are discoverable only in our expanded search, after a user checks the box to Include results not available online, and are not full text available

• **Two types of Searchable records by Search Rights**
  ◦ Free - anyone who uses our Primo environment can discover these records
  ◦ Subscription - only authenticated users can discover these records

• **Two types of Available records by Linking Type**
  ◦ Link Resolver - uses our Alma electronic titles and settings to determine availability, and provide one or more electronic services links, which may be by Static URL, Dynamic URL, or by parser parameters, to the content
  ◦ Link in Record - uses our Alma electronic titles and settings to determine availability, and provide a single static link to the content

• **System Control for Searchability and Availability**
  ◦ On PCI, the settings for availability were split between Alma and the PCI Interface, and searchability was via the PCI Interface
    • Alma controlled the availability for Link Resolver PCI collections by full text activation
    • PCI Interface controlled the availability for Link in Record PCI collections by collection activation
    • PCI Interface controlled the searchability for all PCI collections by collection activation
  ◦ On CDI, the settings for availability and searchability are consolidated into Alma
    • Alma controls the availability and searchability for all CDI collections by full text activation and activation for search only

• **System Updates for activations and deactivations**
  ◦ On PCI, the activation update cycle was split between Alma and the PCI Interface
    • Alma controlled the updating for Link Resolver PCI collections on a Thursday to Monday weekly cycle
      • AP01 - Job for 'Publishing to Primo Central' run 3am Wednesdays
    • PCI Interface controlled the updating for Link in Record PCI collections on the same weekly cycle
    • Ex Libris updates for new, updates, fixes, and deleted content on the same weekly cycle
  ◦ On CDI, the "Rights Update" cycle is consolidated into Alma
    • Alma controls the updating for all CDI collections on a maximum 48 hour cycle
      • AP01 - Job for 'Publishing electronic records to Central Discovery Index' run 3am daily
• **Release Cycles for content changes**
  ◦ PCI content - Weekly updates for content, but Primo Release Notes marked only by month
  ◦ Alma and CDI both align to a Release of the first week of the month
    • [CDI Release Notes](#) - First Wednesday of each month
      • [CDI Collection Lists](#) - unknown update cycle thus far, but original main file was provided April 2020, and then the first update was June 2020
    • [Alma Release](#) - First Sunday of each month via Alma Release Notes
    • Alma Release Update - Second Sunday of each month via Alma Release Notes
    • CDI content - Weekly on Sunday into Monday via [CKB Release Notes](#)
    • CZ Updates - Daily job running from 2am for 'Synchronize changes from CZ' and Community Zone Task Task in Alma > Resources > Manage Inventory
      • This job copies changed authorities and resources from the CZ to the IZ, handling 50,000 changes at a time
      • If more than 50,000 changes, Alma launches additional jobs to handle the rest of the changes, eg 'synchronize changes from CZ - Part 2'
    • "Index Update" - Ex Libris adjustments, eg fixes and deleted content, on a twice weekly cycle on Wednesdays and Fridays
    • Note: It has been noticed that updates to Primo behaviour are occurring out of sync with Alma CDI information blocks, for example JSTOR restoration in September 2020 to Link Resolver has taken effect at least a week in Primo UI before updates to the Alma collections, which are still Linking Type of Link in Record

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**CDI Activation Matrix**

• **DISCLAIMER**
  ◦ Some of these settings appear illogical and contrary to known meaning and documentation (OLH text is included below in quotation marks and italics)
  ◦ Questions are ongoing to Ex Libris to clarify behaviour, documentation, and expected outcome in Primo, as well as awaiting fixes to known issues that are hindering building confidence and adding confusion when the outcomes are not as expected

• **Key differences from PCI to CDI**
  ◦ Database type electronic collections ie 'Zero title' with no portfolios by design no longer have a single purpose of a title level Alma record in Primo, but instead may also control anywhere from 1 to 10s of millions of CDI records
  ◦ When mixed with Link Resolver linking type, primarily for A&Is, the Database record also controls
the searchability of CDI records, in conjunction with other collections with portfolios and active services which control the availability of CDI records

- Note: The A&I aspect is problematic, as the CDI Type field was added in June, but as of August still has almost no populated entries for A&Is and some of them are wrong ie a collection with Abstract in the name which is also marked as a Full Text Collection
- When mixed with Link in Record linking type, common but not limited to Institutional Repositories, the Database record controls both the searchability and availability of CDI records
- New ability to suppress content into expanded search as 'No full-text', most successful when the content is unique to a particular collection
- Note: This results in a UI conflict where records can be simultaneously marked as Open Access and yet 'No full-text'
- Note: CDI design only surfaces source information by full text activations, so suppressing collections eliminates much of the ability to meaningfully troubleshoot collection value or correction of reported issues
- New searchability concept directly from Alma title level full text activations, rather than solely from collection level search activations
- Note: This also means that a full text active collection cannot be removed from discover completely, but can only be suppressed into expanded search as above
- New behaviour of Link in Record collections being preferenced, overriding the display of Link Resolver services, as well as General Electronic Services
  - This was adjusted in the August 2020 Release to remove this preference where the Link in Record collection is Open Access, but it still applies to records which are not marked as Open Access
  - Note: The latter aspect for Open Access indication is an issue, as many CDI records has a problem of being incorrectly marked and also therefore incorrectly ezproxied

- **Priorities underpinning this matrix**
  - Ensure seamless full text access in filtered search, and no false positives
  - Support all possible avenues for value added services, including all Link Resolver links, all General Electronic Services, and Open Access content
  - Maximise discovery and additional access and services in expanded search
Editable fields with the CDI Inventory Operator Role, in the Activation Wizard and in the Electronic Collection CDI tab

CDI Search activation status

- "Should the CDI records from this collection be searchable in Primo, even if they are not active for full text availability?"
  - Tooltip: "If the activation status is set to active, the content of this collection will be searchable in CDI regardless of it's full text activation status"
  - OLH: "When set to Active, display all collections that have been activated for search in CDI. When set to Not Active, display all collections that have not been activated for search in CDI."
  - OLH: "All full text collections that are active in Alma will be searchable by default regardless of what their search activation status is." "All of this content will appear in the filtered search unless you apply the exception rule to suppress active full text"

- Appears for all Electronic Collection Types of Aggregator, Selective, and Database
  - The default is Active when a collection is made active for full text availability
  - Active: CDI records from this collection will be Searchable in Primo
  - Not Active: CDI records from this collection will not be Searchable in Primo (where not active for full text)

- This setting is key for maximizing discovery and supporting supplementary services such as prefilling metadata into document delivery forms, for content which is not available in full text. If set to Active, this setting will make content from a collection which is not active for full text searchable in Primo. If we don't take advantage of this option, we will not have a very well populated expanded search

- Availability = Searchability
  - Collections where all portfolios are active: This setting has no function, other than for staff information, as in CDI full text activation is hardcoded to also make the content active for search
  - Collections where only some portfolios are active: Setting to Active will ensure that all content is searchable, whether it be in filtered search or expanded search, or both. For example, if a collection has only a subset of portfolios active, such as 10 titles of 100, the content for the 10 active titles will appear in filtered and expanded search (as both available and searchable), and the content for the 90 inactive titles will appear only in expanded search (as only searchable, but not available)
  - Collections with no portfolios by design ie Databases: Setting to Active will ensure that all content is searchable
We subscribe to only some titles in this collection

• "What type of portfolio level full text availability access do we have?"
  ◦ Tooltip: "If this option is checked, CDI will only show those results from this collection as full text available that have active full text in any of your Alma collections. If it is not checked, all items in this collections will be flagged as full text available in the search results from CDI"
    • Note: It has been reported to Ex Libris in a case for several months that this tooltip does not make sense, as obviously written for a single checkbox rather than two options, but it hasn’t been fixed yet
  ◦ Alma OLH for Managing Electronic Collections: "Select Yes to indicate a selective subscription or No to indicate a non-selective collection. Selecting No for non-selective collections will cause the Full Text Available indicator to appear for non-selectively subscribed collections, and improve the full text availability indication for non-ID (ISSN/ISBN) content that is harder to match to customer subscriptions."
    • Appears if the Electronic Collection Type is Aggregator or Selective, but not Database as irrelevant given they should have no portfolios
  • The default is Yes for Selective and No for Aggregator, and hardcoded Yes (not visible or changeable) for Database
    ◦ Yes: CDI content is marked appropriately at the publication level to determine availability of Available online in our filtered search by the title eg all Articles for full text active Journal Titles, or no availability of No full-text in our expanded search
    ◦ No: CDI content will all be marked as Available online for all titles in the collection regardless of full text activation eg all Articles for all Journal Titles in the collection. This may be a useful setting for collections which commonly lack standard identifiers and are therefore more difficult for Link Resolver matching to assign availability, but is potentially very dangerous for false positives
• This setting is not new to CDI specifically, and the importance is availability rather than searchability ie which should be marked as Available online or No full-text, and then the flow into Primo will happen naturally ie Available online will be in our filtered and expanded search, and No full-text will be only in our expanded search

CDI-only full text activation

• "Do we want to ensure all records in a Link in Record collection, particularly Database or Selective and Aggregator where there are missing identifiers, are marked as Available online in our filtered search?"
  ◦ Tooltip: "CDI-only full text activation"
Alma OLH for Managing Electronic Collections: "This option is used when the library does not wish the collection and its content to appear in the Primo local index or in the link resolver. It is used for collections that use the link in record, regardless whether the collection also has portfolios or not. Content of collections that are using the link in record are set to full text available on collection level. If Do not show as Full Text available in CDI even if active in Alma is selected as well, an error is displayed when saving."

- Appears for all Electronic Collection Types of Aggregator, Selective, and Database
- The default is not checked
- DO NOT USE for Link Resolver collections, as there is no correlation to actual full text active holdings, so this will result in records showing a View It of 'No full-text available'
- If CDI Search activation status is Active and this box is checked: The records will appear in our filtered search as Available online in our filtered search
- nb added in August 2020 in Repository Search as 'Add CDI-only full text activation' and in September 2020 in the CDI tab as 'CDI-only full text activation'

Do not show as Full Text available in CDI even if active in Alma

- "Do we want to maximise discovery and external access, but not swamp filtered search in Primo?"
  - Tooltip: "If this option is checked, items from this collection are shown as "no full text available" in CDI, even though it is active in Alma"
  - Alma OLH for Managing Electronic Collections: "Select this option to suppress this collection when publishing holdings information to CDI."
  - The setting is also referred to as the 'exception rule' or the option to 'suppress active full text' or 'full text available in CDI only', or 'Activated for CDI only' in the PC to Alma Activation Report
- Appears for all Electronic Collection Types of Aggregator, Selective, and Database
- The default is not checked
- If CDI Search activation status is Active and this box is checked
  - Within Primo if content is unique in CDI: Electronic holdings information is not taken into account when determining availability, and all records will be marked as No full-text, and Searchable only in our expanded search
  - Within Primo if content is not unique in CDI: The records will still appear in our filtered search as Available online or our expanded search as No full-text, if also indexed in other CDI collections
  - Outside Primo when the collection is Link Resolver Linking Type: The CDI citation metadata will still be used by the Alma Link Resolver for searches outside of Primo to provide full text access, such as when a user is in PubMed, Google Scholar, or an A&I database, and clicks links such as ‘Get It UQ Library’
- This setting is key to our control over Searchability of results in Primo on CDI, and trumps all others for
example

- a Link in Record collection will be all **Available online**, except when this box is checked, and then they will all be **No full-text** instead

- a Link Resolver collection of Aggregator type and 'We subscribe to only some titles in this collection' of No, so all will be **Available online**, except when this box is checked, and then they will all be **No full-text** instead

**Feedback and suggestions**

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Report