Central Discovery Index (CDI) - Troubleshooting Tips and Tricks

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Many of our long-standing and reliable troubleshooting strategies have been undermined with CDI, and are no longer reliable.

Some of this is due to design decisions such as Match & Merge removing 'See all', dynamic surfacing of any participant record id rather than by the search activation of the site, and choosing Summon collections over Primo collections, which don't have backlinks or source information.

Other root causes may improve over time, such as Ex Libris listening to our feedback and enriching citations with the lost data, adding DBIDs that are missing from many records, and hopefully a reconsideration of the decision not to surface to the Collection facet collections which are only active for search, rather than only those which are also active for full text.

This page will attempt to log the key data we have left at our disposable to meaningfully manage our collection, provide service to our users, troubleshoot them in support of our users when there are issues, and if all else fails identify at least the source, so we can report to Ex Libris for correction those we cannot fix ourselves.

I'm going to update as I go along, so this won't be very polished, but it will still hopefully be useful.

Note: I've noticed as part of CDI collaboration with other sites, that unfortunately Primo VE has even fewer reliable data points in this area, such as no Incoming URL in the CTO, and also the confusing behaviour of an 'Available online' availability statement updating dynamically to 'No full-text' and the 'View It' also to 'How to Get It' if the Link Resolver fails to match. As such, this guide might be overall more useful for Primo BO sites which has more reliable data and behaviour, but should hopefully still have some value for Primo VE.

This page is supplemented also by two of my other CKCs:

- [How to - Find Central Discovery Index (CDI) records for specific collections in Primo](#)
- [How to - Access and open your Central Discovery Index (CDI) Institutional Holdings File](#)

What's the problem?
• Availability assignment is wrong ie 'No full-text' instead of 'Available online'?
  ◦ Is the title or collection full text active in Alma, including embargo / coverage? - Blue icon
  ◦ Are the identifiers valid and the same in Alma and in the CDI record? - Check for 020a and 022a particularly, and also 776x and 776z, but there are limitations by indicators also
    ▪ CDI availability assignment is only by identifiers and NOT by title alone, whereas PCI used both
    ▪ If your Alma record has no identifiers and only titles, any associated CDI records will never be marked as Available online eg a Book and Book Chapters for a title with no 020a or 776z will always be 'No full-text'
  ◦ Be aware though that the Link Resolver does match by title for View It, if there are no identifiers or no match identifiers in the record (that's a simplistic summary, with more detail by genre etc)
    ▪ So, if you are on Primo BO, then your availability assignment may be 'No full-text', but you'll see in the CTO that the Link Resolver has matched correctly and is filtered out by full text false
  ◦ Is the resource new, or when was it last updated? - Changes 3am next morning and then add 72 hours
  ◦ Is it meant to be Link in Record or Link Resolver? - Check sourceid PNX against Analytics E-Inventory report and Source surfaced in display / facet
    ▪ PNX data examples <sourceid>jstor_X62</sourceid> - if you search X62 in Analytics CDI Provider Package Code is a JSTOR Link in Record collection JSTOR Arts & Sciences XI
    ▪ nb there is quite a common regression for Link in Record records to drop their static link for unknown reasons, and these then fall back to behaving like Link Resolver. If you are sure that you have such a record (and there isn't a Link Resolver collection in the mix), report these to Ex Libris as regressions
  ◦ Check the resource by coverage in Alma and in the holdings file - is the coverage correct, which indicates the assignment might be where the issue is occurring?

• Availability assignment is mismatched eg 'Available online' and yet View It is 'No full text available'?
  ◦ Check your settings for blanket availability assignment eg What is your 'selective' setting ie 'We subscribe to only some titles in this collection?', do you have 'Add CDI-only Full Text activation', or is it a Database collection with no portfolios?
    ▪ Be VERY wary of these for Link Resolver collections, as this will assign Available online to all records, but the Link Resolver may still fail

• No Links in the View It aka 'No full text available'?
  ◦ Is the CTO matching and by what collection?
  ◦ What identifiers is the OpenURL using, and are they in our Alma record? - Check if valid and add them
  ◦ Check for fields in the CTO like <key id="rft.inventory_id">, <key id="rft.mms_id">, <key id="package_pid">, and <key id="portfolio_PID"> and search these in your Alma environment. These should end in your Institution code
  ◦ Checks for any filters in the CTO like <key id="Filtered">true</key> and <key id="Filter reason">Date Filter</key>, which will indicate a hidden service which will prevent the link surfacing, and make sure your coverage is correct
  ◦ What is the expected linking type? - If the linking type is Link in Record and there is only 'No full text available, report this to Ex Libris, as it is a defect

• Record ID does not match any active collections?
This is irrelevant as the record id surfaced for the logical record is dynamically chosen from any of the participant ids. This is because the logical record represents a synthesis of citations for the work, and does not represent a single citation from a single source. Ex Libris has not hardcoded only record ids from your search or full text activations to surface in your environment. Note: The applies ONLY to works which are NOT unique

- Links are failing to match correctly, user hitting an auth wall?
  - Is there an ezproxy when there shouldn't be, or vice versa? - Check for OA icon and use Ezproxy widget
  - Does the resource use a linking template, like Gale (VERY problematic)? - Check the addrecordsourceid
  - PNX - check to see if any search_scopes and the control_sourceid are present with data, and track back into Alma for full text active collections by the DBIDs

- Link in Record single static link is presented in View It instead of Link Resolver service/s, and you think it shouldn't be?
  - Current design as of August 2020 is that any full text active collection which is Link in Record will trump Link Resolver collections, EXCEPT when the Link in Record participant record is not Open Access
  - Does the record have an Open Access icon? If not and you think it should - report to Ex Libris
  - If not Open Access, check the PNX for DBIDs and search these in Analytics E-Inventory to identify the Link in Record source and determine whether removing it will have a desired effect

- Further tips
  - Check another site - is it working there and by what CTO match to what CZ collection?
  - If IZ collection is active full text and CZ collection is active for search - this is unlikely to work if the collection does not have ISSNs / ISBNs, so activate the CZ for full text
  - Source facet will appear in the Link Resolver is matching in CTO, even if it's not working for the availability assignment (so long as the records have the PNX data)
  - Collection facet is showing the hidden full text rights by Link Resolver
  - Set up an Analytics report scheduled daily with the DBIDs to check these quickly, as Ex Libris has NOT made these searchable in Alma, and they are also not in the information block, so you have to click into the Electronic Collection to see them, which is very timeconsuming

- Failed attempts at fixes
  - Display Logic Rules do not work to hide certain static links for Link in Record collections on-the-fly like it does for Link Resolver

Feedback and suggestions

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