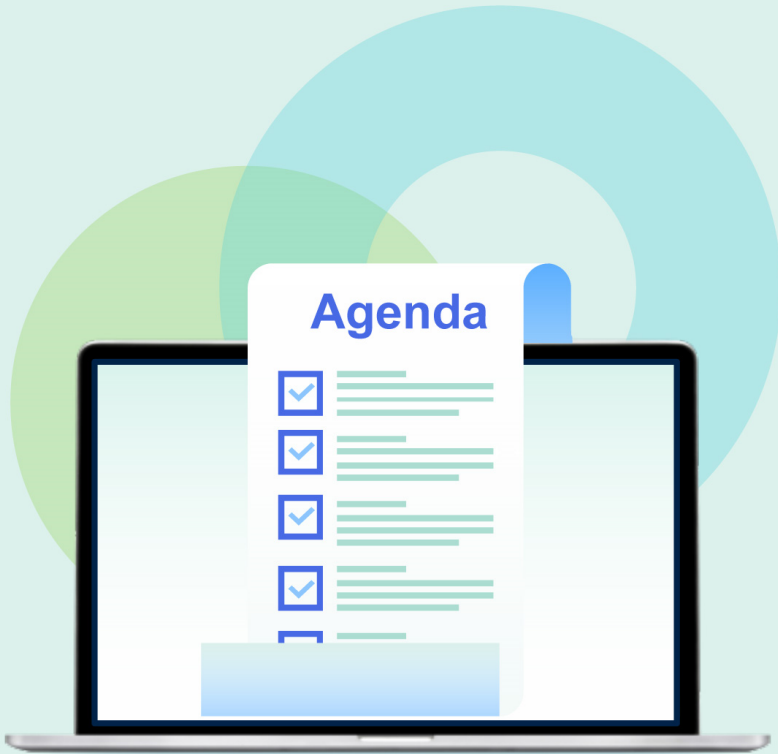




# CDI: The Central Discovery Index

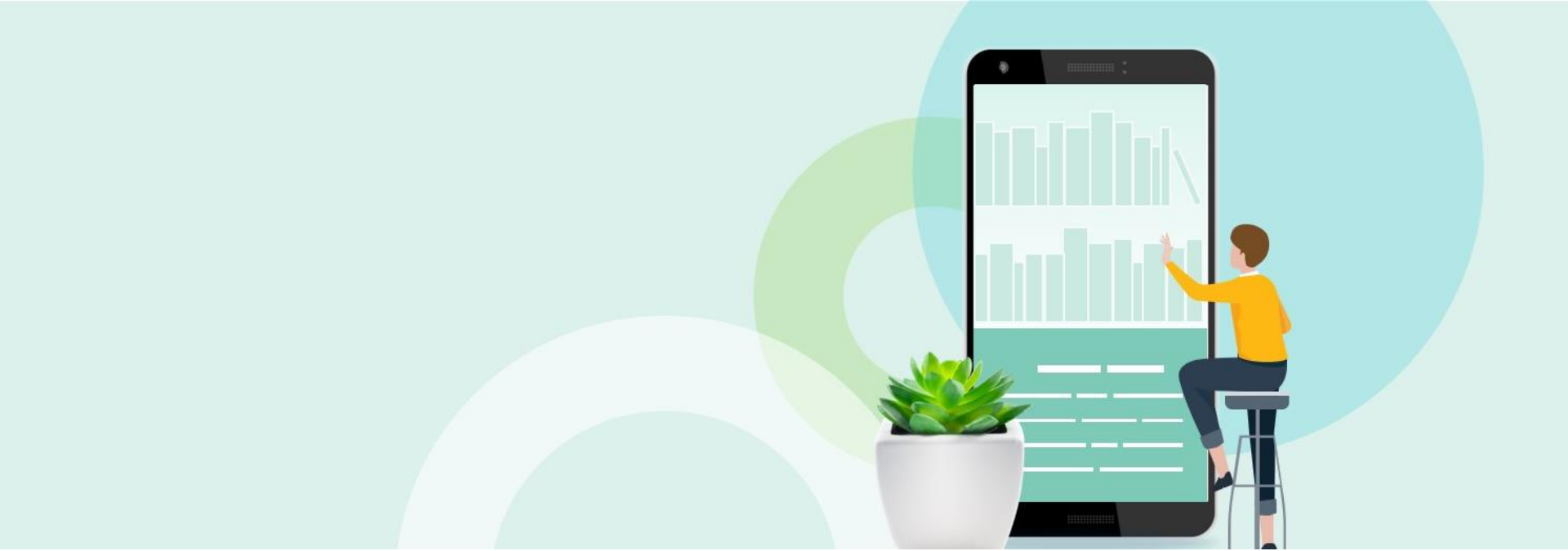
California Community Colleges



- CDI Overview
- CDI Changes and Goals
- CDI Rollout and Schedule
- CDI Enablement and Switchover
- E-Resource Management with CDI
- Summary and Resources

# CDI Overview for Existing Customers

- [CDI Overview for Existing Customers](#) (6 minutes)



# CDI Overview and Key Changes

# CDI Overview

- CDI replaces the Primo Central Index (PCI) and the Summon Index
- CDI has billions of content objects with interconnected metadata
- More content in CDI than in either PCI or the Summon Index

# What is changing and what is our goal?



## Steep increase of available material

- More material
- More diverse material types



## User expectations change

- Increased influence of social media and consumer platforms on user perception
- Expectation from faculty for users to use more diverse material

## Single Search Box



Publisher and aggregator content

Digital repositories

Research outputs & data

Open Access content

Library catalog

Audiovisual content

Special Collections

# What is changing and what is our goal?



# The move to CDI for Primo – key changes for library patrons

- Merged instead of grouped records
- More granular resource types
- Some changes in search and ranking behaviour due to new technology
- Searchable ORCID IDs

## **A note about permalinks:**

Most but not all permalinks will be preserved – ca. 92%



# Merged record instead of record groups

- The same item is indexed from several content providers
- In order to not show duplicates to the user
  - The records are grouped in Primo Central with one representative record on the result list
  - The records are merged in Summon – only one enriched record is displayed

ARTICLE / [multiple sources exist. see all](#)

## Overview of scientific evidence for chocolate health benefits

Van Wensem, Joke

Integrated Environmental Assessment and Management, Ja

Primo Central

CDI

ARTICLE

## Overview of scientific evidence for chocolate health benefits

van Wensem, Joke

2015

Integrated Environmental Assessment and Management, Vol.11 (1), p.176-176

# Merged records – more information

CDI will be using the same merge mechanism as Summon

Webinar recording:  
***The Match & Merge Story:  
Improving Search Results, Reducing  
User Confusion*** ([video](#), [.pdf](#))

The screenshot shows the ExLibris Knowledge Center website. At the top, there is a search bar with the text "Search under current path" and a magnifying glass icon. To the right of the search bar are three buttons: "More Sites", "System Status", and "Submit a Case". Below the search bar is a breadcrumb trail: "Home » Primo » Content Corner » Central Discovery Index » Documentation and Training » Match and Merge in CDI". The main heading is "Match and Merge in CDI". Below the heading is a "Return to menu" link. The "Introduction" section begins with the text: "The Central Discovery Index (CDI) content comes from a variety of sources, including publishers, content aggregators, open-access repositories, institutional repositories, and more. In total we ingest content from over 2,000 Data sources. As we get content from a wide variety of sources, we may have more than one record for a given citation. Displaying all of these separately can confuse users and make it harder for the user to find what they are looking for in the results." Below this text is a "feedback" button. On the right side of the page, there is a table of contents with the following items: "Table of contents", "1. Introduction", "2. Content Types Using the Match and Merge Process", "3. Conditions for Matching Records to Merge Them", "4. Transitive Merge", and "5. Match and Merge FAQ".

# The move to CDI for Primo – key changes for librarians

- Move to single activation via Alma
- Optional EasyActive setting available
- Faster update cycles (up to 48 hours)

# CDI Rollout Plan and Schedule

- CDI Enablement began for Alma-Primo customers in February 2020
- The Enablement Process:
  - Ex Libris transfers your current activations to CDI
  - You continue to work in PCI while testing your activations in CDI
  - When ready, you can check a flag in PCI to switch to CDI production
- CDI Enablement in May, exact date TBD, CDI Switchover no later than October

# CDI Enablement and Switchover Process

- CDI Enablement and Switchover work is done by an Ex Libris team
- We recommend that you take time to check activations and become familiar with the activation options
- Any activations you make in PCI after the initial enablement should also be done in CDI
  - Transfer by Ex Libris is a one-time process

# CDI Enablement Process

CDI  
Enablement



Customer  
driven  
switchover



General  
Switchover

- PC activations are moved from PC to Alma
- Single activation will be enabled for CDI
- Notifications will be sent before and after the move, reports will be available

- Customers can go live on their own time (members of consortia move all together)

- All remaining customers go live

# The general customer upgrade process for Primo in detail

## CDI Enablement

- All existing Primo Central activations are activated in Alma production – a report will be available on Alma
  - Alma/CDI functions are enabled on Alma
  - Alma publishes activations and full text availability indications to CDI
  - Once moved, the systems work separately, activations are only moved once
- 
- Customers remain live with Primo Central but can see CDI by adding a parameter to the production URL
  - Primo Central activations continue to be managed as before

No effect on library patrons

# Search result list in Alma

Electronic collection ▾

Keywords ▾

oxford journals



Advanced ▾

Facets <<

Electronic Collections (1 - 20 of 136) | oxford journals

Save Query

Type ▾

Aggregator packa... (487)

Database (455)

Selective package (1633)

Interface ▾

AAPG DataPages (1)

ABC-CLIO (1)

Academic Journals F... (1)

+ More (544)

Electronic Collection Type ▾

Book Package (1137)

Journal Package (836)

Mixed Material Pa... (145)

OPAC (1)

CDI Search Activation ▾

Active for Search (1620)

Not Active for Search (7)

🏠 Institution

👤 Community

Sort by: Rank ▾



1



## Oxford journals (Oxford University Press Journals)

Type: Selective package

Services: Full Text (Available)

Interface name: Oxford University Press

Linking Level: Article

Creation Date: 07/02/2012 08:00:00 AWST

Modification Date: 26/09/2019 20:37:39 AWST

Other details

In CDI: Yes

Active for Search in CDI: Yes

CDI Search Rights: Free

CDI Full Text Rights: Subscription (Linkresolver)

CDI Full Text Linking: Linkresolver

📄 Orders: 1

Collection ID: 61265112470002101

Deactivate for Search in CDI

Edit Collection



2



## Oxford Journals Open Access Collection (Oxford Journals Open Access Collection)

Type: Selective package

Services: Full Text (Not Available)

Interface name: Oxford University Press

Linking Level: Article

Creation Date: 05/09/2019 20:14:37 AWST

Modification Date: 26/09/2019 20:37:28 AWST

Other details

In CDI: Yes

Active for Search in CDI: Yes

Active for full text in CDI only: Yes

CDI Search Rights: Free

CDI Full Text Rights: OpenAccess

CDI Full Text Linking: Link in record

Collection ID: 61390548150002101

Deactivate for Search in CDI

Remove CDI-only full text activation





# New filters in the Advanced Search on Alma

Electronic collection ▾

Zone:  Institution  Community

Keywords ▾

Contains Keywords ▾

oxford journals

AND OR

🔍 Look-up or select ▾

Contains Keywords ▾

Electronic Collection : Electronic Collection Name ↻

Electronic Collection : In CDI ↻

Electronic Collection : CDI Search rights ↻

Electronic Collection : CDI Fulltext rights ↻

Electronic Collection : URL (Electronic Collection) ↻

Title >

Electronic Collection >

Electronic Portfolio >

Facets <<

Type ▾

Aggregator package (50)

Database (1)

Selective package (85)

Interface ▾

ACLS Humanities eB... (1)

Adam Matthew Digital (1)

Allen Press (1)

+ More (44)

Electronic Collection Type

Book Package (12) ▾

Journal Package (100)

Mixed Material Pac... (17)

Availability (Electronic)

Electronic Col

🏠 Institution

Sort by : Rank ▾

1



**Oxford journals (Oxford University Press Journals)**

**Type:** Selective package

**Services:** Full Text (Available)

**Interface name:** Oxford University Press

**Linking Level:** Article

**Creation Date:** 07/02/2012 08:00:00 AWST

**Modification Date:** 26/09/2019 20:37:39 AWST

[Other details](#)

In CDI: Yes

Active for Search in CDI: Yes

CDI Search Rights: Free

CDI Full Text Rights: Subscription (Linkresolver)

CDI Full Text Linking: Linkresolver

📄 Orders: 1

Collection ID: 61265112470002101

2

**Oxford Journals Open Access Collection (Oxford Journals Open Access Collection)**

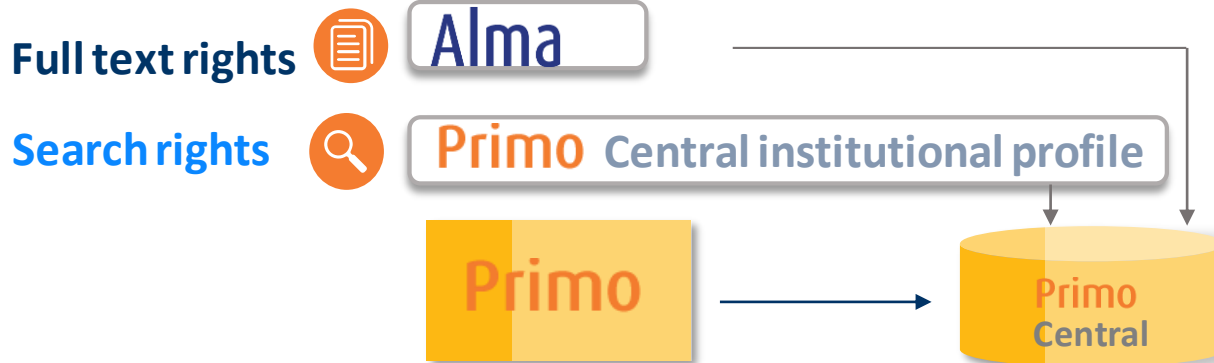
Deacti



## E-Resources Management with CDI

# Single activation – what does that mean?

Current flow  
(Primo Central)



Primo Central institutional profile

Institution: Green University

Primo Central Collection Activation - Providers List (1 - 10 of 332)

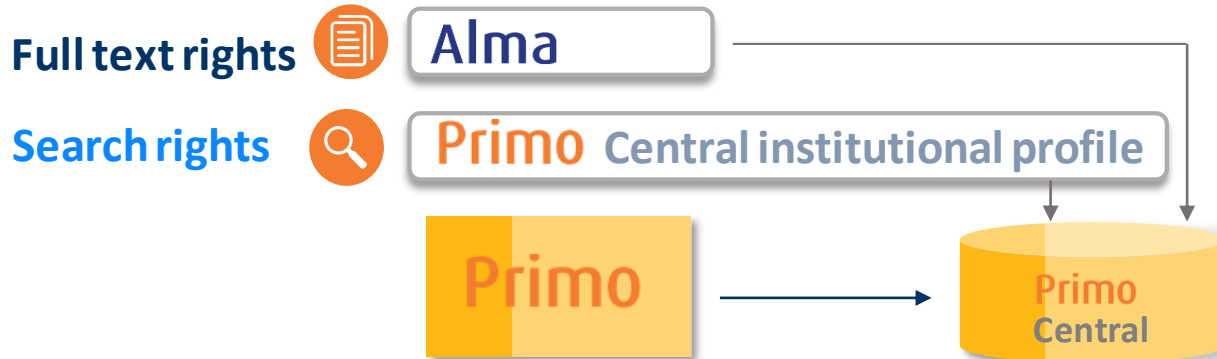
Provider Name Filter

Provider's Name	# Collections
	1
	15
le de l'enseignement supérieur)	3
4 Accessible Archives	31
5 Adam Matthew	119
6 AIB Library	2
7 Al Mashhal FZ LLC	4
8 Alexander Street Press	446
9 Ambrose Video Publishing	2
10 American Council of Learned Societies (ACLS)	1

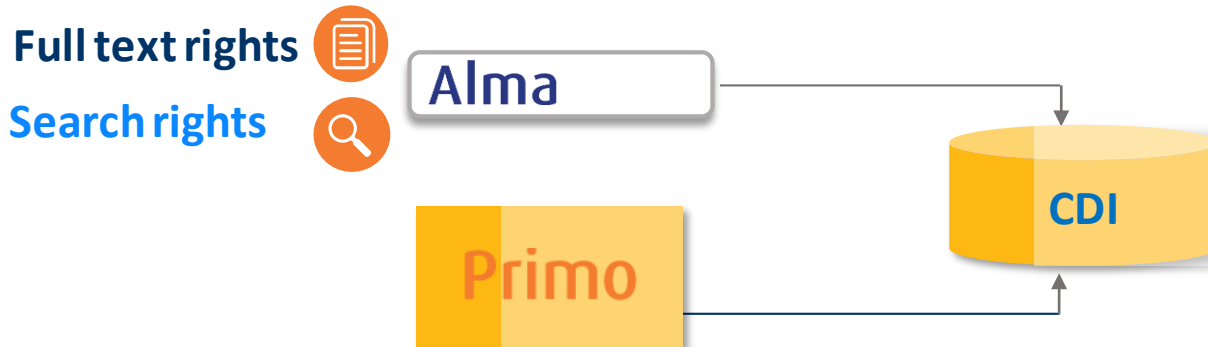
Items per page: 10 1 - 10 of 332 < > >>

# Single activation – what does that mean?

Current flow  
(Primo Central)



New flow (CDI)



# CDI single activation from Alma: Settings and defaults

**Default:** *All collections that are set to full text available will automatically be searchable in CDI regardless if they are active for search or not – customers can suppress them from search*

- Two activation settings are available on Alma
  - **Fully flexible setting** (as today)
  - **EasyActive setting** (more automation, very similar to how Summon works today)
- Consortia activations work in the same way as all other Alma activations:
  - One institution with **multi campus setup**
  - Collaborative network with **network zone** and institutions

# CDI Fully Flexible setting



Full text settings are under full control of the library



Ability to activate for search and for delivery separately

- Ability to activate for search where no full text available
- Collections will be available to users only after activation
- 48 hours between collections activation to search availability

- All customers who move from Primo Central to CDI will be moved with the fully flexible setting
- A later switch to EasyActive is possible

# CDI EasyActive setting



Full text settings are under full control of the library



Everything (with exceptions) will automatically be searchable

- No activation for search
- Collections will be available to users immediately after ingest
- No delay with activating collections for search
- No broken link between acquiring content and making it available to patrons



Exceptions apply

- Subscribed A&I databases
- Collections with specialized content that are only relevant for specific regions or institutions
- Reference collections

# Benefits of the CDI EasyActive setting (for Primo)

Less work, less coordination, less "forgotten" activations

- No separate activation for search – collections become immediately available to patrons
- No calculation of alternative coverage – if full text is available, it is searchable

Librarians can focus on full text, search is handled automatically

A proven concept

- Very close the way Summon activations are handled, it is a proven concept
- Recommended for all libraries filtering their default search by availability (items not available in full text will only appear if the user clicks on “expand beyond the library collection“)





## Summary and Resources

# Training and Documentation

- Key CDI Video Training
  - [CDI Overview for Existing Customers](#) (6 minutes)
  - [CDI Rollout Plan](#) (4 minutes)
  - [Single Activation for Existing Customers](#) (15 minutes)
- Documentation
  - [CDI Frequently Asked Questions for Primo Customers](#)
  - [How Are Collection Activations Moved from Primo Central to CDI for Consortia and Multi-Campus Institutions?](#)

# Summary

- The Central Discovery Index (CDI) will allow for improved discovery of the resources you already maintain
- CDI will improve and streamline the activation process
- The switchover from PCI to CDI will be primarily be done by Ex Libris
  - An enablement period will allow you and your staff to test activation and processes before switch to production
- Two activation options will give you flexibility in e-resource management



Thank you!