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EX LIBRIS
Knowledge Days

# CDI Tips and Tricks

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# Agenda

- **Session Objectives**
- **Overview of CDI**
  - What is CDI?
  - How do Primo and CDI Work Together?
- **Troubleshooting Primo/CDI Problems**
  - Best practices
  - Linking issues
  - Availability issues
  - Search and Ranking
  - About The CDI Support Team
- **Optional CDI Features**
  - Quicklinks
  - Unpaywall
  - Exclude CDI Ebooks
  - Show both types of links in View It
- **Conclusion**

# Objectives Of This Session

- Help you to understand better how Primo works with CDI.
- Share knowledge on how to troubleshoot CDI issues in Primo.
- Share information on optional features in CDI that can improve Primo search.

# Overview of CDI

# Overview of CDI, Alma, and Discovery

## Discovery

- Central Discovery Index
- Includes over 5 billion citations
- Accessible in both of Ex Libris' discovery systems
- Most resources are free to search
- Some A&I databases require a subscription to search

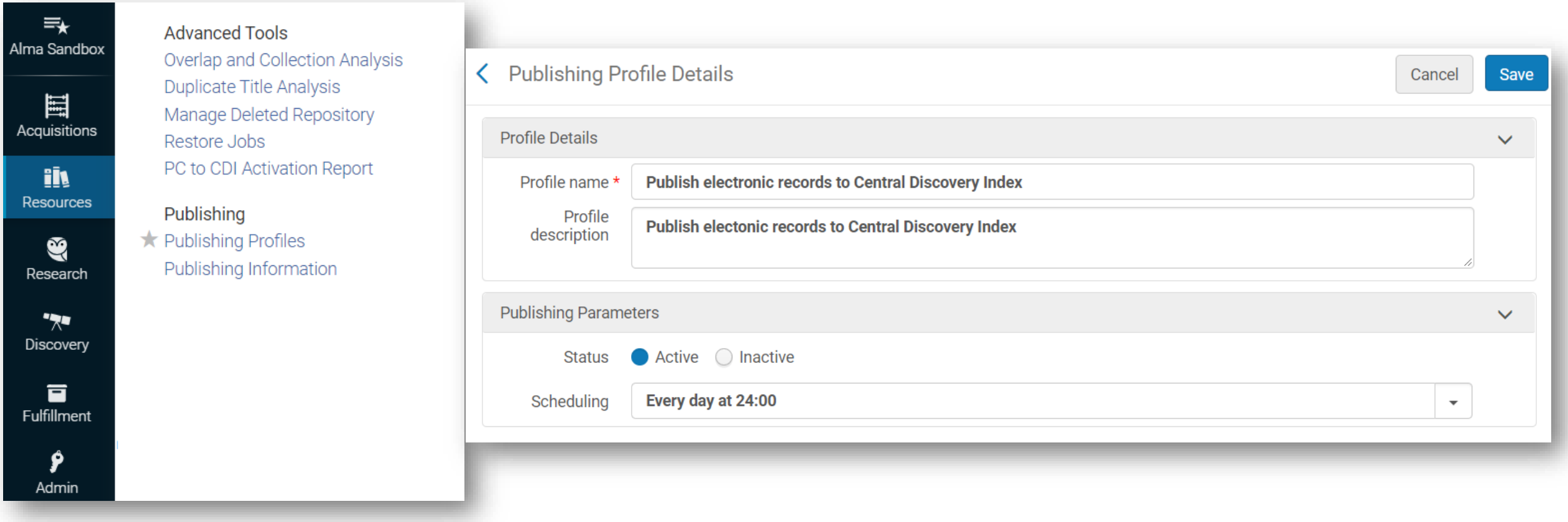
## Delivery

- Linking to content via Alma
- Full-text content in its own database/repository
- Direct linking or use of link resolver
- May require authentication or authorization to access

# How Does CDI Work with Primo?

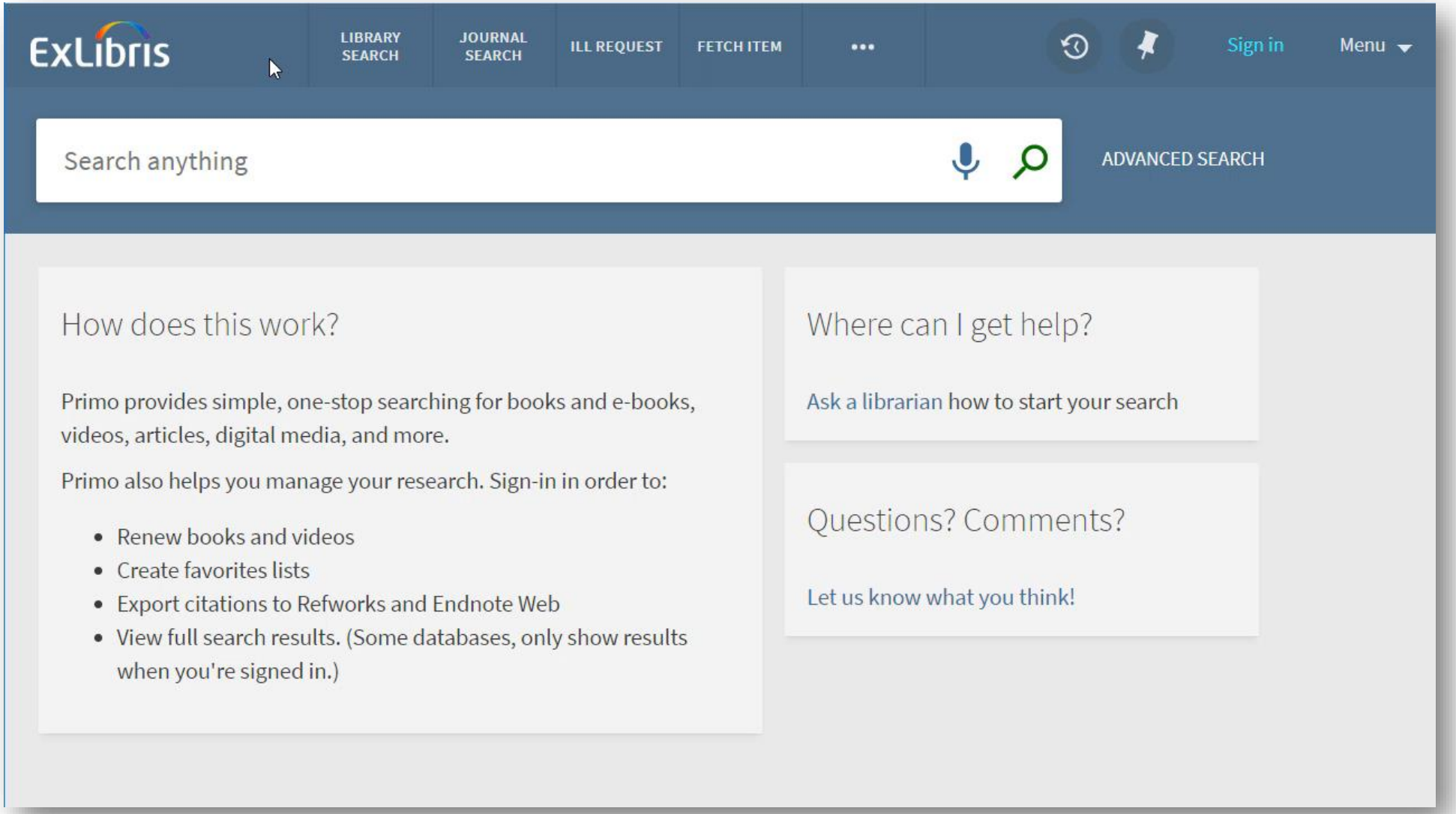
- Every site has a unique CDI Registration Key and a publishing job to publish holdings to CDI.
- In CDI, the holdings are processed ~ every 30-40 hours.
- CDI works with Primo automatically, behind the scenes. But there is a lot you can still do!

# Publish Electronic Records to Central Discovery Index

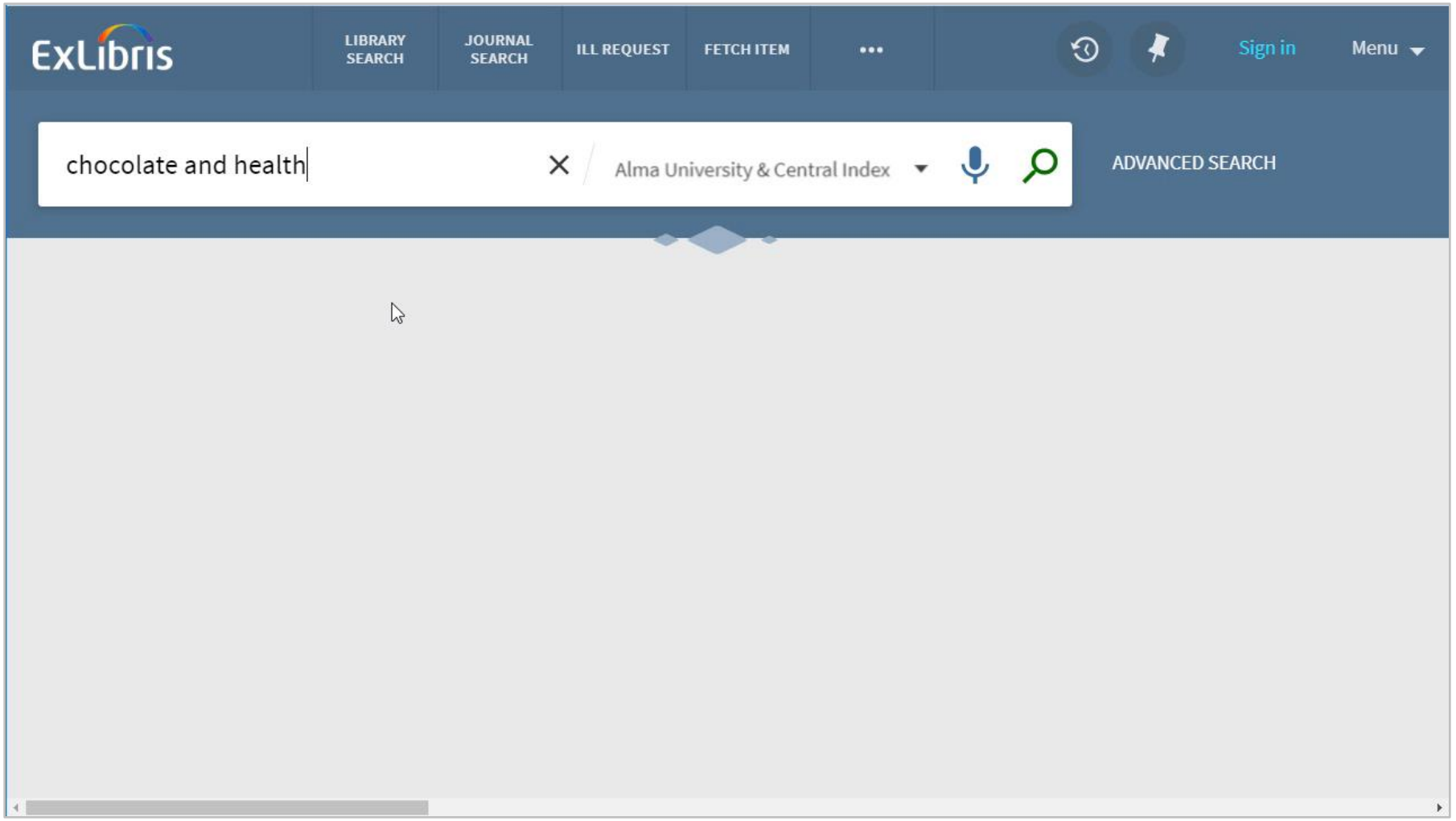



***Resources > Publishing > Publishing Profiles > Publish Electronic Records to CDI***

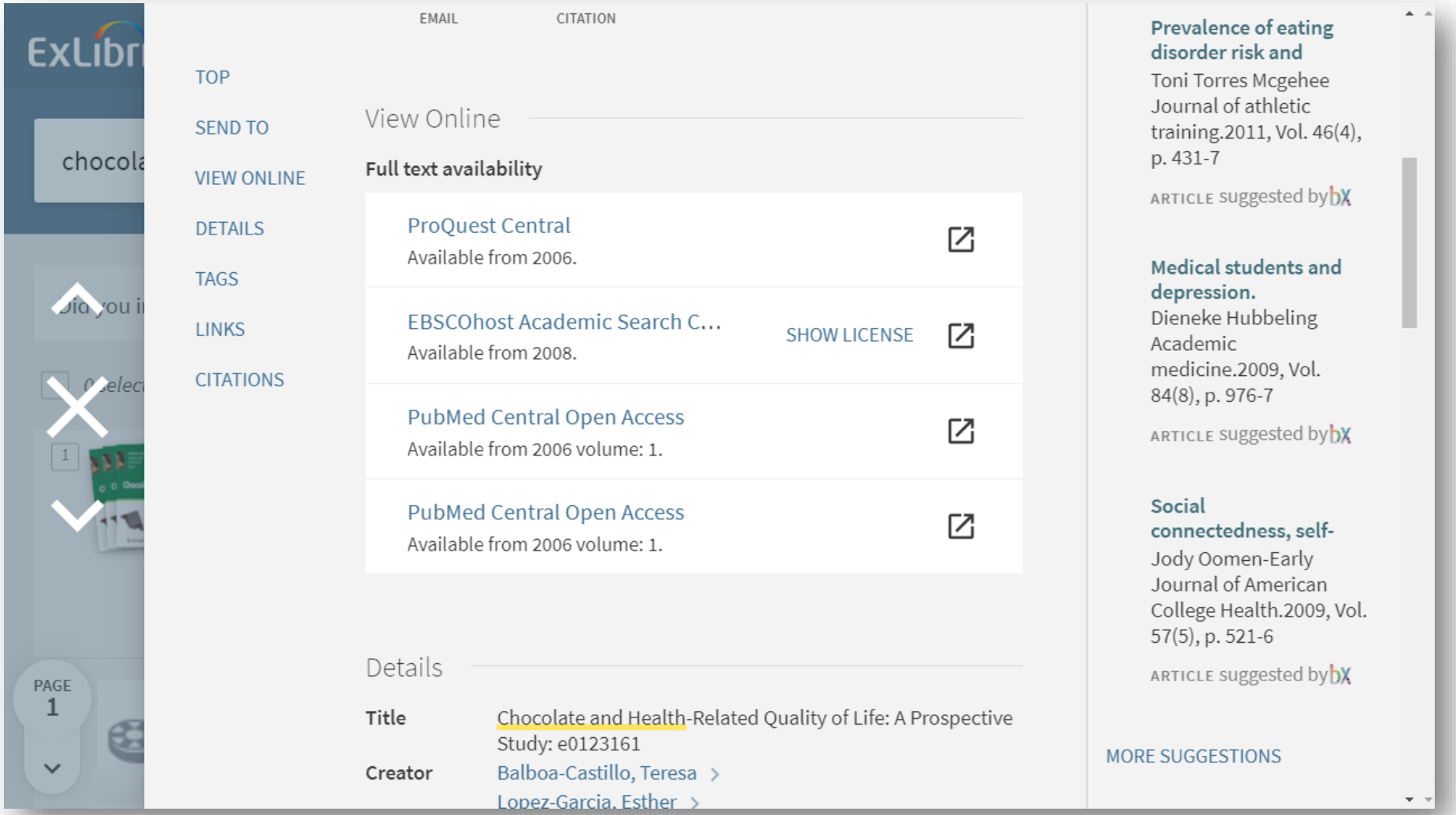
**Content loaded into CDI** → **Patrons search index via Primo VE/Summon**



Content loaded into CDI → Patrons search index via Primo VE/Summon → Receive results



Content loaded into CDI → Patrons search index via Primo VE/Summon → Receive results → Access full text via links



# Demo: CDI Tab Settings in the Electronic Collection Editor

- Let's take a look at the CDI Tab in the Electronic Collection Editor for ProQuest Central collection in Alma, and the configuration options there.

# Troubleshooting Primo/CDI Problems

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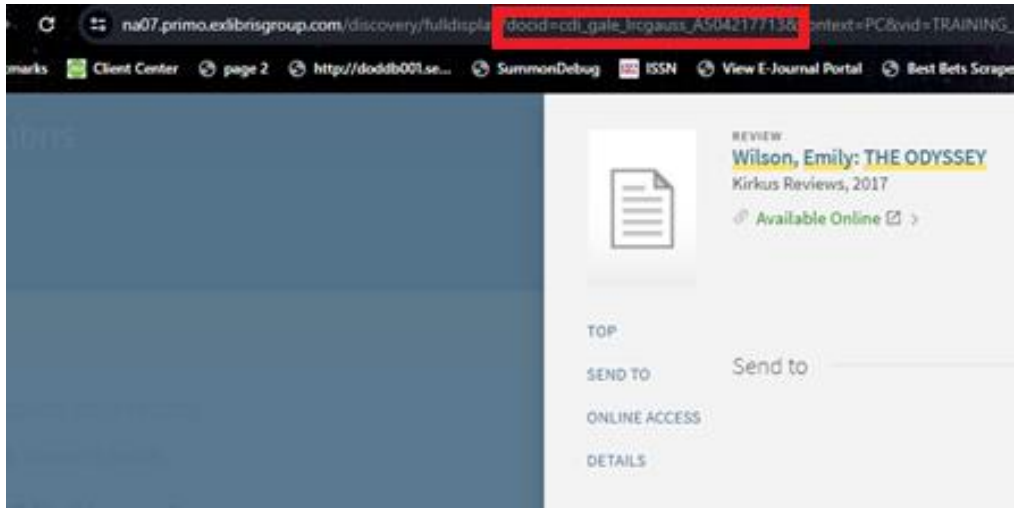
# Best Practices for Reporting Issues

- Does the record come from CDI or from Alma?
  - Hint: check for cdi_ in the docid parameter of the URL




- If it is a CDI record, you can report the issue to CDI Support or Primo Support

# What Information Do We Need to Troubleshoot?

## THE OPENURL

Primo Permalink or Citation

Front end logins (proxy, Primo)

# Troubleshooting Linking Issues

- Which Link Type Is Being Used?
  - Link Resolver or Link in Record

- If Link Resolver, you can view the CTO Debug page for more information
  - Case will often go to Alma Data Services

- If Link in Record:
  - Broken links should go to CDI Support Team
  - Auth issue? Check Central Index and Proxy Setup

# Demo: Types of Links

- Let's take a look at a couple of links to see the troubleshooting flow for different link types:

- https://na07.primo.exlibrisgroup.com/permalink/TRAINING_2_INST/1cke9l8/cdi_gale_lrcgauss_A504217713

# Troubleshooting Availability

- Unexpected full text available status, or unexpected full text not available status
- Brief record status comes from CDI availability status based on holdings file
- CDI Activation Analysis Tool can be used to determine the source of availability in the brief record
- If full text availability is expected but not shown, check portfolio settings in Alma

# Demo: CDI Activation Analysis Tool

- Let's take a look at the CDI Activation Analysis Tool:

  https://cdi-rights-analysis.hosted.exlibrisgroup.com/client/create

# Troubleshooting Search and Ranking Issues

- CDI Ranking and Linguistic Features are not configurable, unlike local records in Primo
  - You can boost local records over CDI records in blended scope
- Ranking and search operations are fully documented
- CDI's Dedup system: 'Match and Merge'

# Demo: DBID Searching

- Let's run a "DBID" Search in Primo VE and see how CDI results for the collection are returned:

- Database: Gale Literature Resource Center (DBID ILR)

- https://na07.primo.exlibrisgroup.com/discovery/search?query=dbid,contains,ILR&tab=Everything&search_scope=MyInst_and_CI&vid=TRAINING_2_INST:TRAINING_2_INST&offset=0

# The CDI Support Team

- CDI Tier 1 Support – addresses one-off linking and metadata issues by making individual record corrections

- CDI Tier 2 Support – addresses broad linking and metadata issues that may require contacting the vendor

- Content Operations Team – responsible for ingesting and mapping vendor records to CDI records, this team can apply programmatic fixes for broad metadata issues.

- Provider Relations Team – this team contacts vendors to address widespread issues with CDI records, and works with vendors to bring in new content.

# CDI Support Example – An Incorrect DOI

- If the DOI is incorrect on a single record, **CDI Tier 1 Support** can fix it. The updated DOI takes precedence even if new record is received from the vendor.

- If the DOI is incorrect on many records, **CDI Tier 2 Support** will analyze the case and contact the vendor to address the issue. This team also contacts vendors about missing content.

- **The Content Operations** team can address a metadata issue affecting many records programmatically, if there is a pattern that can be applied, such as replace the DOI prefix with a different prefix on all Sage Journals records.

# What Does CDI Support Need From You?

- The most important piece of information is the permalink to the item in Primo.
- If the problem is a broken link and you have a working link to the item, please share it!
- If the problem is that 'No Availability' shows for an item where availability is expected, please share which collection(s) are expected to have availability.

# Optional CDI Features

## Making the Most of CDI in Primo VE

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# Quicklinks

- A Quicklink is a type of link that comes directly from a CDI record.
- A Quicklink brings you directly to the PDF or HTML document.
- Quicklinks automatically included as of May 2024.

# Unpaywall: Open Access Links

- Unpaywall is a CDI record source with Link in Record links.

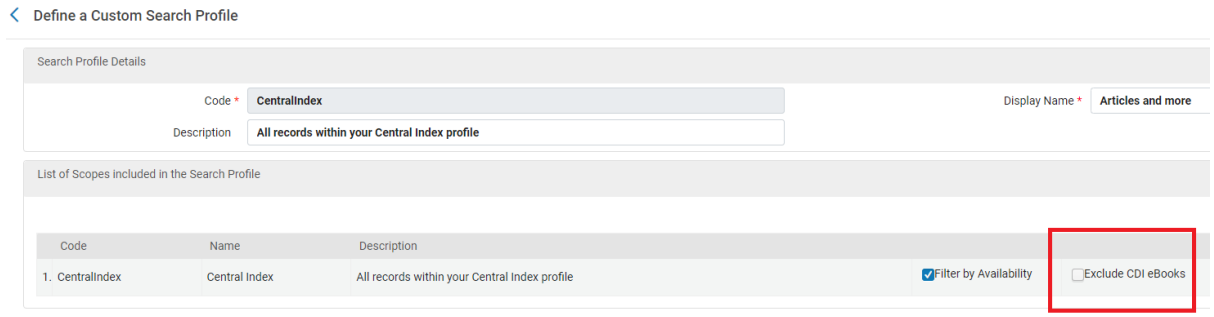
  - *Screenshot of Unpaywall PDF link goes here*

- The original Unpaywall integration with Primo VE was via API.
- Activation of the CDI collection is recommended.

# Exclude Ebooks from CDI

- CDI Ebooks can cause duplicates with Alma records for eBooks, as these records cannot dedup.

- A popular configuration is to exclude CDI eBooks.



# Demo: Exclude CDI Ebooks

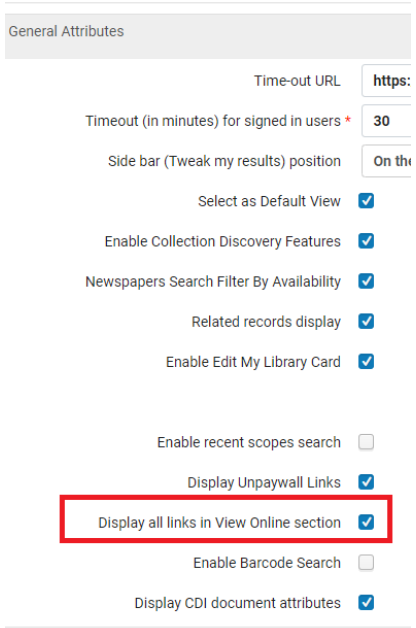
- Let's review the configuration in Alma for excluding CDI Ebook records

- Alma Configuration > Discovery > Search Profiles > CentralIndex

# Show Both Types of Links in View It

- This configuration allows you to show both Link Resolver and Link in Record links in the View It.

- Display All Links in Full Display for CDI



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# Conclusions

# Conclusion

- You now know how CDI and Primo work together to provide your discovery experience.
- You have also learned about troubleshooting techniques and optional features.
- Questions?

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# Thank you

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