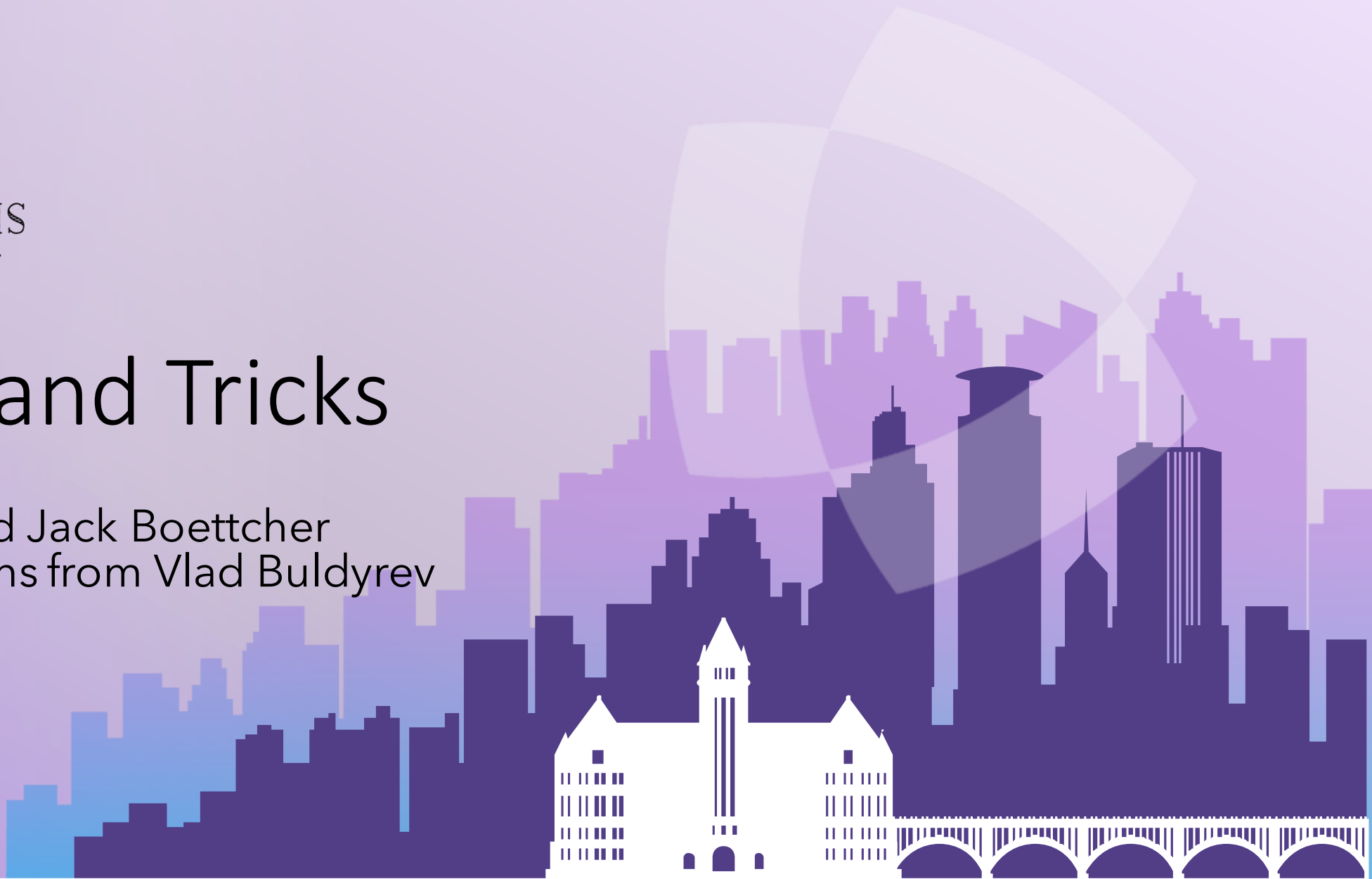


CDI Tips and Tricks

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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

- Alma Sandbox
- Acquisitions
- Resources**
- Research
- Discovery
- Fulfillment
- Admin

- Advanced Tools
 - Overlap and Collection Analysis
 - Duplicate Title Analysis
 - Manage Deleted Repository
 - Restore Jobs
 - PC to CDI Activation Report
- Publishing
 - ★ Publishing Profiles
 - Publishing Information

← Publishing Profile Details Cancel Save

Profile Details

Profile name *

Profile description

Publishing Parameters

Status Active Inactive

Scheduling

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

Content loaded into CDI

Patrons search index via
Primo VE/Summon

The screenshot shows the ExLibris website interface. At the top left is the ExLibris logo. To its right are navigation tabs: LIBRARY SEARCH, JOURNAL SEARCH, ILL REQUEST, and FETCH ITEM, followed by a three-dot menu icon. Further right are icons for a refresh button, a pin, and a 'Sign in' link, and a 'Menu' dropdown arrow. Below this is a large search bar with the placeholder text 'Search anything'. To the right of the search bar are a microphone icon, a magnifying glass icon, and a link to 'ADVANCED SEARCH'. The main content area is divided into two columns. The left column has a heading 'How does this work?' followed by a paragraph: 'Primo provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more.' Below this is another paragraph: 'Primo also helps you manage your research. Sign-in in order to:' followed by a bulleted list: 'Renew books and videos', 'Create favorites lists', 'Export citations to Refworks and Endnote Web', and 'View full search results. (Some databases, only show results when you're signed in.)'. The right column has a heading 'Where can I get help?' followed by a link 'Ask a librarian how to start your search'. Below that is another heading 'Questions? Comments?' followed by a link 'Let us know what you think!'.

Content loaded into CDI

Patrons search
index via Primo
VE/Summon

Receive results

The screenshot displays the ExLibris search interface. At the top left is the ExLibris logo. The navigation bar includes buttons for LIBRARY SEARCH, JOURNAL SEARCH, ILL REQUEST, and FETCH ITEM, followed by a three-dot menu. On the right side of the navigation bar are icons for a refresh button, a pin, a 'Sign in' link, and a 'Menu' dropdown. The search bar contains the text 'chocolate and health' and a clear 'X' button. To the right of the search bar is a dropdown menu set to 'Alma University & Central Index', a microphone icon, a green magnifying glass icon, and a link to 'ADVANCED SEARCH'. The main content area below the search bar is currently blank, with a mouse cursor visible in the center.

Content loaded into CDI

Patrons search
index via Primo
VE/Summon

Receive results

Access full text via
links

The screenshot shows a search results page on the ExLibris Primo interface. On the left, a navigation sidebar includes links for TOP, SEND TO, VIEW ONLINE, DETAILS, TAGS, LINKS, and CITATIONS. The main content area is divided into two columns. The left column, under the 'EMAIL' tab, features a 'View Online' section with a 'Full text availability' list. This list includes four entries: ProQuest Central (available from 2006), EBSCOhost Academic Search Complete (available from 2008, with a 'SHOW LICENSE' link), and two PubMed Central Open Access entries (both available from 2006 volume: 1). Below this is a 'Details' section with fields for Title ('Chocolate and Health-Related Quality of Life: A Prospective Study: e0123161') and Creator ('Balboa-Castillo, Teresa' and 'Lopez-Garcia, Esther'). The right column, under the 'CITATION' tab, displays three article suggestions with their titles, authors, and publication information, each followed by 'ARTICLE suggested by bX'. The suggestions are: 'Prevalence of eating disorder risk and Toni Torres Mcgehee Journal of athletic training.2011, Vol. 46(4), p. 431-7', 'Medical students and depression. Dieneke Hubbeling Academic medicine.2009, Vol. 84(8), p. 976-7', and 'Social connectedness, self- Jody Oomen-Early Journal of American College Health.2009, Vol. 57(5), p. 521-6'. A 'MORE SUGGESTIONS' link is located at the bottom of this column. The left sidebar also shows a search bar with 'chocola', a 'PAGE 1' indicator, and a 'Close' button.

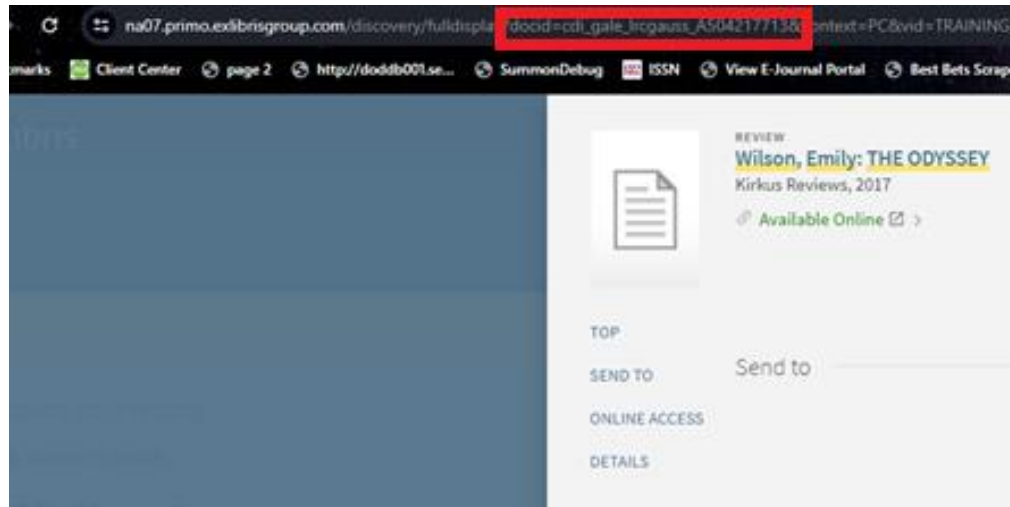
Demo: CDI Tab Settings in the Electronic Collection Editor

- 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

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)

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,LR&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

Quicklinks



ARTICLE

Randomised, double-blind, placebo-controlled studies on flurbiprofen 8.75 mg lozenges in patients with/without group A or C streptococcal throat infection, with an assessment of clinicians' prediction of 'strep throat'

Shephard, A. ; Smith, G. ; Aspley, S. ; Schachtel, B. P.
International journal of clinical practice (Esher), 2015-01, Vol.69 (1), p.59-71

“ Summary Background Diagnosing group A streptococcus (Strep A) throat infection by clinical examination is difficult, and misdiagnosis may lead to inappropriate antibiotic use...”

PEER REVIEWED OPEN ACCESS

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- 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.

< Define a Custom Search Profile

Search Profile Details

Code * Display Name *

Description

List of Scopes included in the Search Profile

Code	Name	Description	<input checked="" type="checkbox"/> Filter by Availability	<input type="checkbox"/> Exclude CDI eBooks
1. CentralIndex	Central Index	All records within your Central Index profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>



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

General Attributes

Time-out URL

Timeout (in minutes) for signed in users *

Side bar (Tweak my results) position

Select as Default View

Enable Collection Discovery Features

Newspapers Search Filter By Availability

Related records display

Enable Edit My Library Card

Enable recent scopes search

Display Unpaywall Links

Display all links in View Online section

Enable Barcode Search

Display CDI document attributes

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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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