

CDI Best Practices and Recommendations

CDI Defined

Central Discovery Index (CDI) is a database of citations gathered from a wide array of sources such as journal articles, e-books, legal documents and more. They are harvested from thousands of primary and secondary commercial publishers and aggregators, and from open-access repositories. CDI is also a relational database between citations rather than just an aggregated list of abstracts or citations. This enables linking features like those between a book review and the book in question or a book chapter and the entire book. By default, CDI will try to display results for material where the full text is available for your users based on your local subscriptions or subscriptions provided to members of the consortium.

Source: Section titled "Central Discovery Index (CDI)."

<https://wiki.library.ucsf.edu/display/SILS/Primo+VE+Glossary>

Required Role: CDI Operator

Components of CDI:

The screenshot shows the 'CDI Institution Settings' interface. At the top, there are six tabs: 'Electronic Collection Description', 'General', 'Additional', 'Notes', 'History', and 'CDI'. The 'CDI' tab is selected. Below the tabs, the settings are as follows:

- CDI Search activation status:** Active Not Active
- We subscribe to only some titles in this collection:** No Yes
- Do not show as Full Text available in CDI even if active in Alma:**
- Local Notes:** A text input field.

CDI Search activation status OR CDI Search activation status

- Active/Yes: If selected, the content will be searchable.
- Not Active/No: If selected but a collection has both active portfolios and inactive portfolios, only the active portfolios will show as View Online,
 - NOTE: Book Chapters (e.g., book chapters, encyclopedia entries, etc.,) from CDI will *not* show as View Online, even if the book is activated.

Recommendation: Select Active or Yes

We subscribe to only some titles in this collection

- Yes: CDI will try to match your active portfolios in Alma to records in CDI to show “View Online” on those.
- No: Everything from the collection (as identified in CDI) will show as Online.

Recommendation: Select as appropriate for your electronic collection.

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

- Checked: CDI content will *not* have a View Online link in Primo. Instead, it will show a “How to get it” link.
 - NOTE: This will affect book chapters in CDI as well.

Recommendation: Checkbox should be left unchecked

*Recommendations provided by the libraries in WRLC

**Source of information and definitions: Harvard Wiki: [“CDI Management in Alma and interoperability with Primo”](#), created by Corinna Baksik.

Additional aspects to consider:

Duplicate results for e-books appearing in Primo (if using a blended search scope)

Scenario: Two results are being displayed in Primo for a single activation of a title.

Likely cause: A record from both Alma and CDI are being displayed.

- Mark the “do not show as full text” checkbox.
- Good practice to select “No” next to “CDI Search activation status”, so that unrequestable books do not appear in the results of an expanded search.
- CON: Book chapter-level results (dictionary entries, encyclopedia entries, etc.,) will no
- longer appear if “CDI Search activation status” is set to No.

Additional information:

Do not show as Full Text available in CDI even if active in Alma: No

Type: Selective package

Services: Full Text (Available)

Interface name: Ebook Central

Linking Level: Book

Creation Date: 08/16/2018 15:38:15 EDT

Modification Date: 12/16/2021 24:03:03 EST

Available for CDI search activation ⓘ

Provider coverage: Yes

Active for Search in CDI: Yes

Search Rights in CDI: Free

Full Text Rights in CDI: Subscription (Linkresolver)

Full Text Linking in CDI: Linkresolver

CDI Type: Full Text Collection

- Available for CDI search activation:
- Provider coverage:
- Search Rights in CDI:
- Full Text Rights in CDI:
- CDI Type:

Definitions for each section can be located [here](#).

Linking Methods

Primo supports the following linking methods, which are set at the collection level:

- OpenURL linking
- Link in Record
- Primo Link Template CDI collections

Source: [CDI and Linking to Electronic Full Text document](#) by ExLibris

Additional sources:

Single Activation with the Fully Flexible Setting (Ex Libris documentation):

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/020Single_Activation_with_the_Fully_Flexible_Setting](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/020Single_Activation_with_the_Fully_Flexible_Setting)

CDI and Linking to Electronic Full Text:

[https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_\(English\)/CDI_-_The_Central_Discovery_Index/050CDI_and_Linking_to_Electronic_Full_Text](https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_(English)/CDI_-_The_Central_Discovery_Index/050CDI_and_Linking_to_Electronic_Full_Text)

Primo VE Release Notes page (Will include CDI updates):

https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE

Single Activation for CDI in Alma - Overview:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/010Single_Activation_for_CDI_in_Alma_-_Overview](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/010Single_Activation_for_CDI_in_Alma_-_Overview)

Using the Central Discovery Index (CDI) in Alma:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/060Using_the_Central_Discovery_Index_\(CDI\)_in_Alma](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/060Using_the_Central_Discovery_Index_(CDI)_in_Alma)

Specialized Search Scopes for CDI (released March 2022):

https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE/2022/010Primo_VE_2022_Release_Notes?mon=202201BASE#CDI-Related_Updates

Revision #5

Created 26 September 2023 22:55:39 by Jackie Saavedra

Updated 1 November 2023 23:49:38 by Jackie Saavedra