CARLI

CARLI/I-SHARE OFFICE HOURS
PRIMO VE AND CDI:
IMPROVE DISCOVERABILITY AND PROMOTE EFFICIENT AND EFFECTIVE SEARCHING

JUNE 24, 2021

Agenda – 6/24/2021

- Announcements
- Reminders and upcoming Alma/Primo VE events and learning opportunities
  - See https://www.carli.illinois.edu/calendar for CARLI events

- Today's Agenda: Improve Discoverability and Searching
  - Primo VE Configurations for Ranking and Boosting, Blended Search Profiles, Dedup and FRBR
  - E-Collection settings that affect results from CDI and how you might edit them
  - Testing changes in discovery

Announcements/Reminders

I-Share Annual Statistics Package

- CARLI staff are continuing work on the new I-Share Annual Statistics Package. We are prepared to run many of the stats on July 1 for all I-Share libraries. Watch for an announcement next week on the availability of the stats package and the ability to run data locally.

New page on CARLI website!

- General Alma Troubleshooting and Problem Reporting: https://www.carli.illinois.edu/products-services/i-share/alma-troubleshooting
- Includes general troubleshooting tips for Alma and Primo VE and best practices for reporting problems to CARLI.

Upcoming Office Hours

- July 8, July 22, August 12, August 26 (always at 2:00pm)

More Announcements/Reminders

I-Share Resource Sharing Code revised

- Eliminates Voyager-specific language
- Removes text specific to no-longer-supported ILLINET direct borrowing
- Specifies that the patron's library is responsible for covering costs of any direct shipping of materials directly to patrons
- Clarifies that I-Share libraries with collections outside Illinois are not required to make those available via I-Share requests
- Requires I-Share libraries to post their building access policies and hours on their websites
- Reminds I-Share libraries to keep their patron data as current as possible
- See full code at: https://www.carli.illinois.edu/products-services/i-share/circ/I-ShareResourceSharingCode

I-Share lost material processes and billing begin July 1

- Remember: I-Share libraries no longer charge overdue fines or lost material processing fees

Let's Talk about Fulfillment
(I mean Alma, not life's purpose)

For the opportunity to talk with CARLI staff and your CARLI library colleagues about Alma Fulfillment and Automated Fulfillment Network workflows, known issues, and Q & A.

- Friday 7/2 at 2:00pm – https://www.carli.illinois.edu/lets-talk-about-fulfillment20210702
- Tuesday 7/13 at 10:30am – https://www.carli.illinois.edu/lets-talk-about-fulfillment20210713
- Notes are posted on the CARLI calendar event for past sessions.

Ex Libris Knowledge Days Online

- Registration is free
- Choose the “Register” link in the “EMEA/NA” column. NA stands for North America.
- https://knowledge.exlibrisgroup.com/Cross-Product/Conferences_and_Seminars/Knowledge_Days_-_ELUNA/2021_Knowledge_Days
  - Final two sessions next week!
  - Tuesday, June 29 - Managing E-Resources Advanced
  - Thursday, July 1 - Fundamentals of Sets and Jobs

CARLI Discussion Sessions after the Ex Libris Knowledge Days Online Webinars

- Fifteen minutes after each of the Ex Libris Knowledge Days Webinars, CARLI will host a Zoom meeting for I-Share institutions to discuss the webinar.
- See the CARLI Calendar for Zoom links to the CARLI Discussion sessions https://www.carli.illinois.edu/calendar or the CARLI Knowledge Days webpage https://www.carli.illinois.edu/products-services/i-share/alma/exl-knowledge-days-2021 - No Registration necessary

Primo VE Configuration Options

Ranking Configuration

- Allows you to configure aspects of the results ranking algorithm to affect the order of local records in all search results
- Alma Configuration > Discovery > Search Configuration > Ranking Configuration
- Options include:
  - Field Boosting – not recommended to alter unless specific local need
  - Date Boosting – may choose to boost more recent materials
  - Resource Type Boosting – may choose to boost some types
  - Institution Boosting – boost your institution's records in search results that include the entire network

https://www.carli.illinois.edu/products-services/i-share/discovery-interface/ranking_configuration

Boosting Records in Blended Search Profiles

- Alma Configuration > Discovery > Search Configuration > Search Profiles > Search Profiles tab
- If the "Search Type" is listed as Blended, you may boost or deboost results from one source over another.
- The most common scenarios for a Blended search are Search Profiles that include:
  - Local data and Central Index (CDI)
  - Local data, NZ (network) data, and Central Index (CDI)
- The default Search Profile “MyInst_and_CI” used by many libraries already boosts Local data over the Central Index data, but you may wish to boost it further.

https://www.carli.illinois.edu/products-services/i-share/discovery-interface/blended_search_profiles

Dedup and FRBR Options

- By default, Primo VE performs deduplication and FRBR-ization and groups records together when displaying search results.
- Records that have been deduplicated and grouped will not be obvious in search results.
    - Can use "Dedup and FRBR Test Utility" to reveal them
- Records in a FRBR group will appear with the indication "N versions found. See all versions >" as a single entry in the initial search results.
- Alma Configuration > Discovery > Display Configuration > Configure Views > Edit the View* > Brief Results tab

*Settings are per View, so you can use a Test View for testing changes.

Dedup and FRBR Recommendations

- CARLI Recommendations
  - Sort FRBR Version list by: Date – newest
  - Define FRBR display for local records: Generic
  - Enable FRBR checked
  - Enable Dedup checked

https://www.carli.illinois.edu/products-services/i-share/discovery-interface/dedup_frbr

Best Practices for Testing Configuration Changes

Before you start:

- Identify several example Primo VE searches to serve as your baseline. Document the behavior of the example searches by copying search URLs, taking screenshots, or recording video.
- Reach out at your institution to other stakeholders.

When testing:

- Test one small change at a time.
- After you make a change, use a new Private browser window to perform the search again in order to avoid caching.
- Document what you change as you go, noting the effects on examples.
- Consider small group testing with other stakeholders at your institution.

Once you've decided to implement a change in production:

- Document the change, the date, and the rationale for the change.
- Share information on the change(s) with other stakeholders.

CDI Settings in Electronic Collections in your Institution Zone

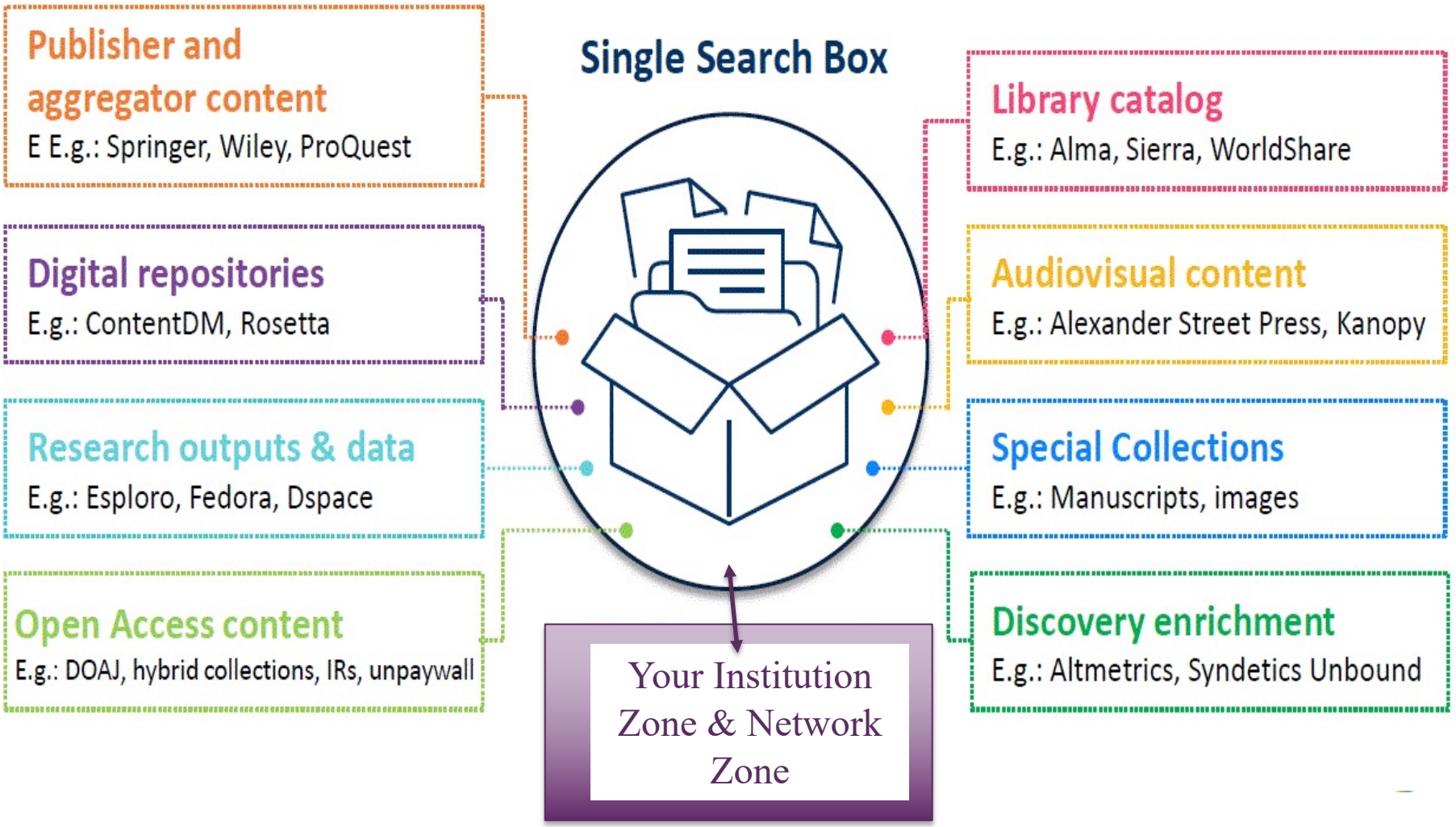
Central Discovery Index: CDI

- What is CDI?
- CDI Settings for e-collections:
  - What are they?
  - Why change them?
  - What search behavior is changed?
- New and revised documentation from Ex Libris

What is Primo VE CDI?

- Central Discovery Index (CDI): a database of citations collected from e-resources including journal articles, e-books, legal documents and more.
- Used in Primo VE "Everything" and "Articles" type search slots. Note: A **Discovery** or indexing feature (not **Delivery**/Get Full Text per se.)

Sources of CDI Citations: From Ex Libris Alma harvesting, From your IZ and the NZ



CDI Settings for Institution Zone e-collections: What are they?

1. Activation options - Alma e-collection activation - yes or no

2. Only Some Titles active? Selective – yes or no

3. Suppress sending citations to CDI setting

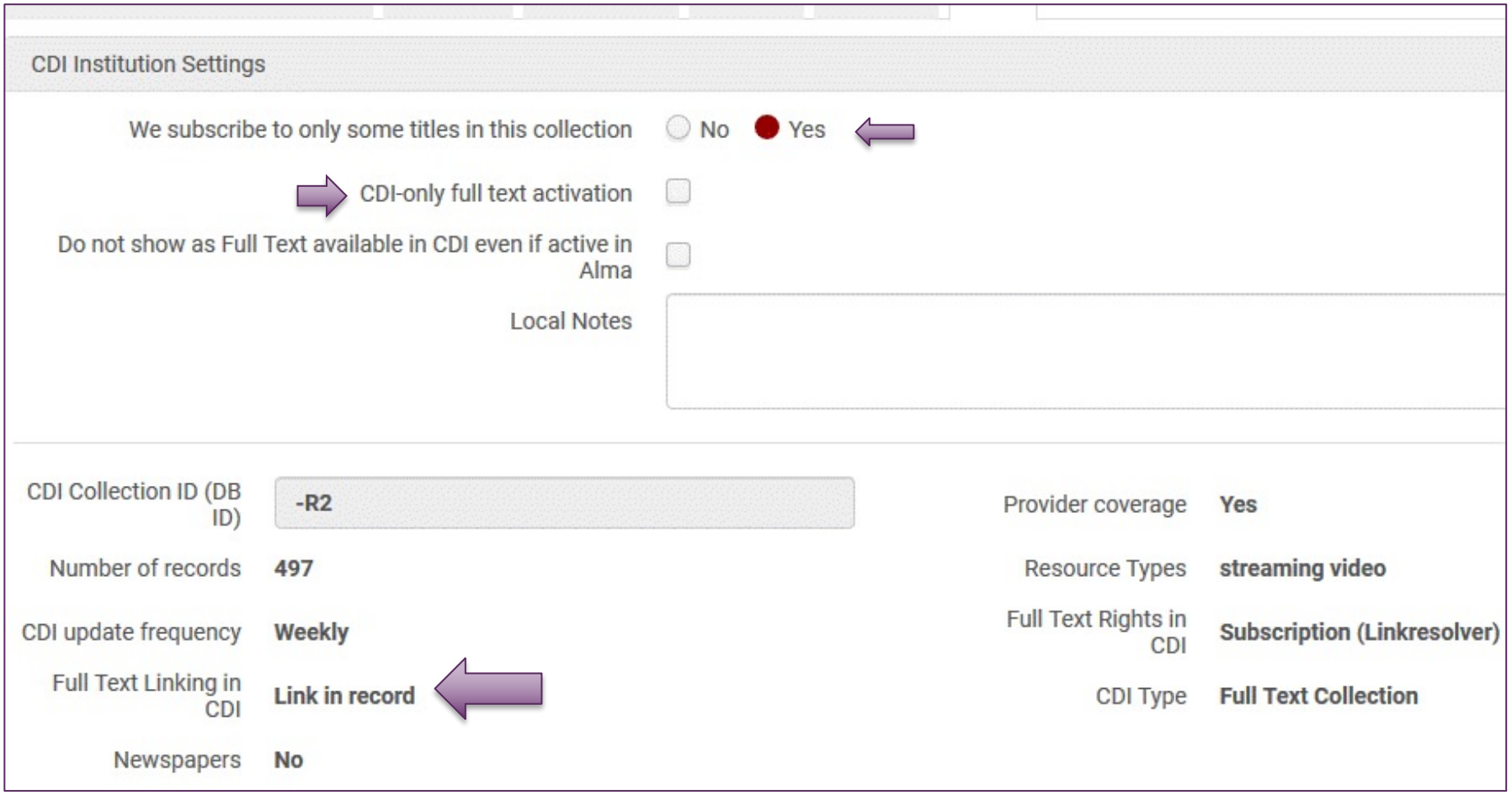
4. Only send citations to CDI option (no full text)

1. I-Share is Alma “Easy Active” activation

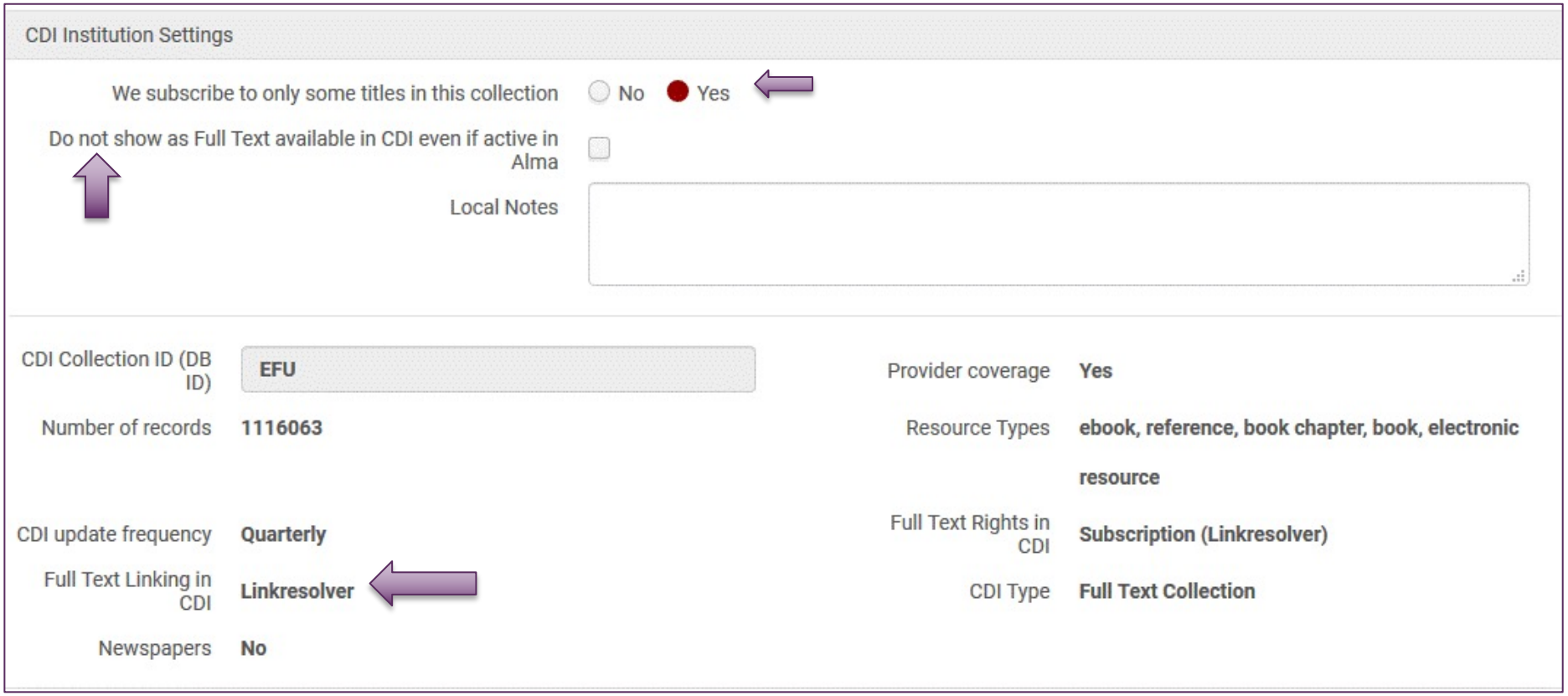
If active, e-collection sends to CDI with some exceptions: EBSCOhost & a few other vendors.

These settings are in the CDI search activation tab.

CDI search activation tab – Link in record e-collection



CDI search activation tab – Linkresolver e-collection

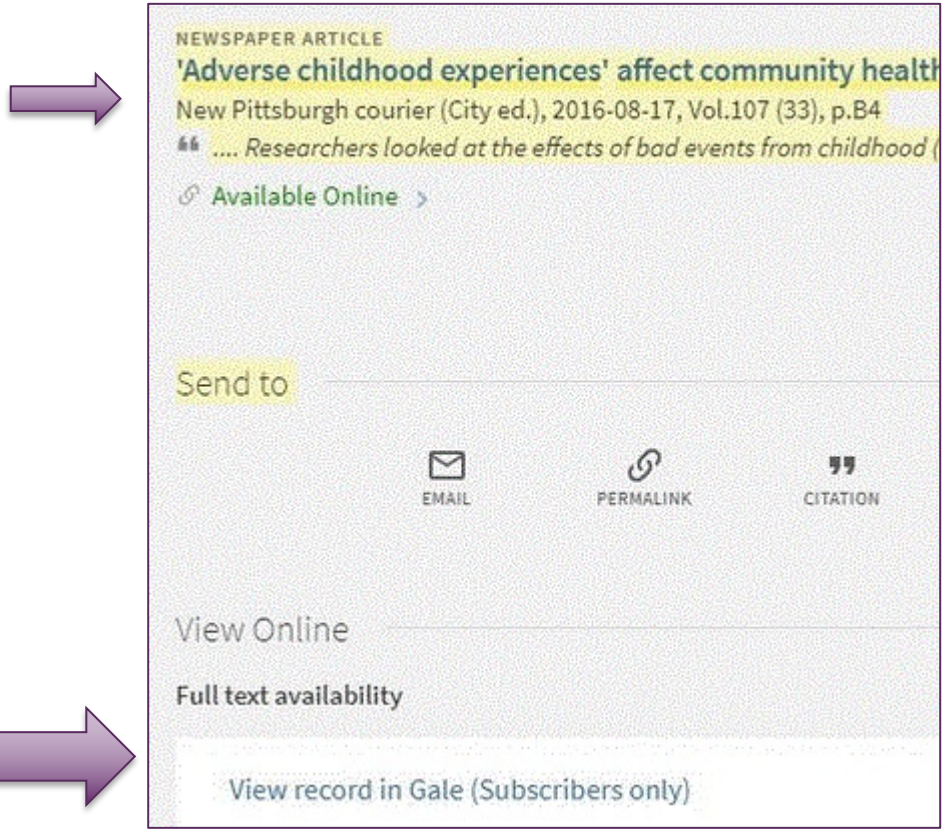


2. CDI Only Some Titles active? (Selective setting)

- Recommend set to “Yes” = selective for all package e-collections even aggregators/100%ers
- Why change? To improve delivery of Full text.

- *NOT* the setting "Activate new portfolios associated with service automatically?":

CDI Only Some Titles active: “Yes” = selective even if an aggregator. What search behavior is changed? Here is an example where it was set to “No”:



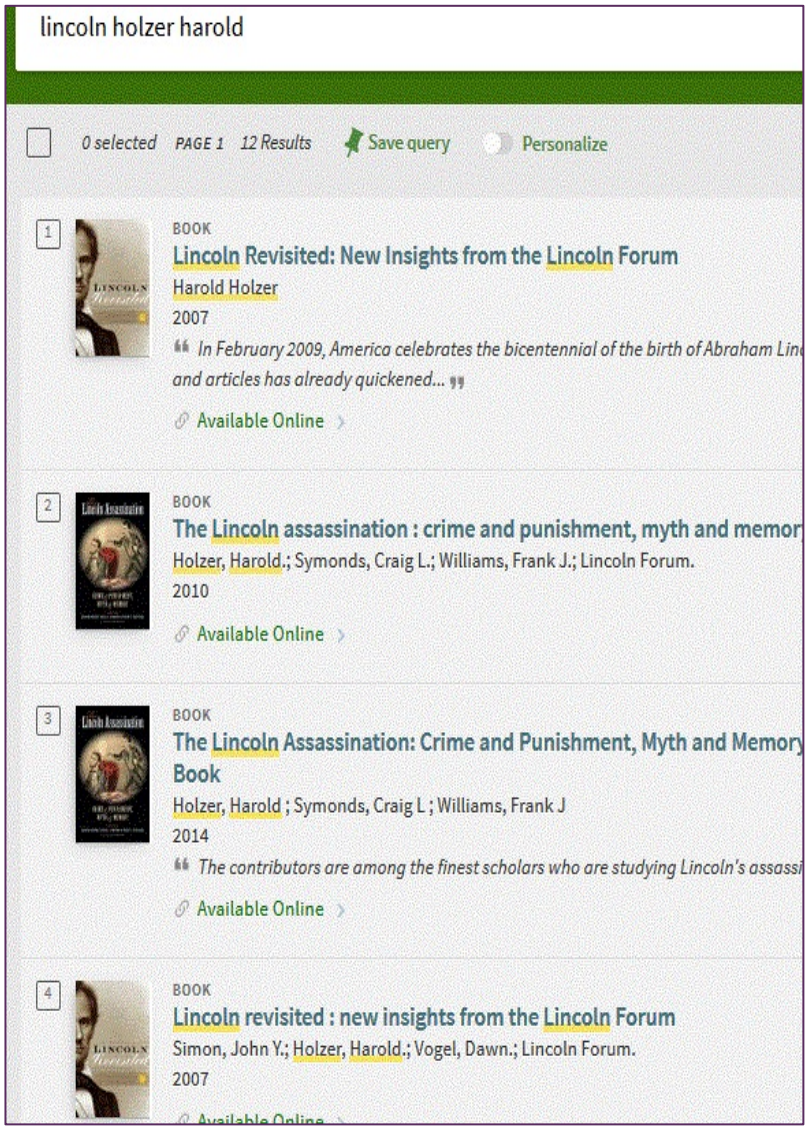
The “View Online” link on full display to a Gale collection didn’t connect. That title wasn’t in the e-collection yet. If it had been set at selective= yes, less chance of this happening.

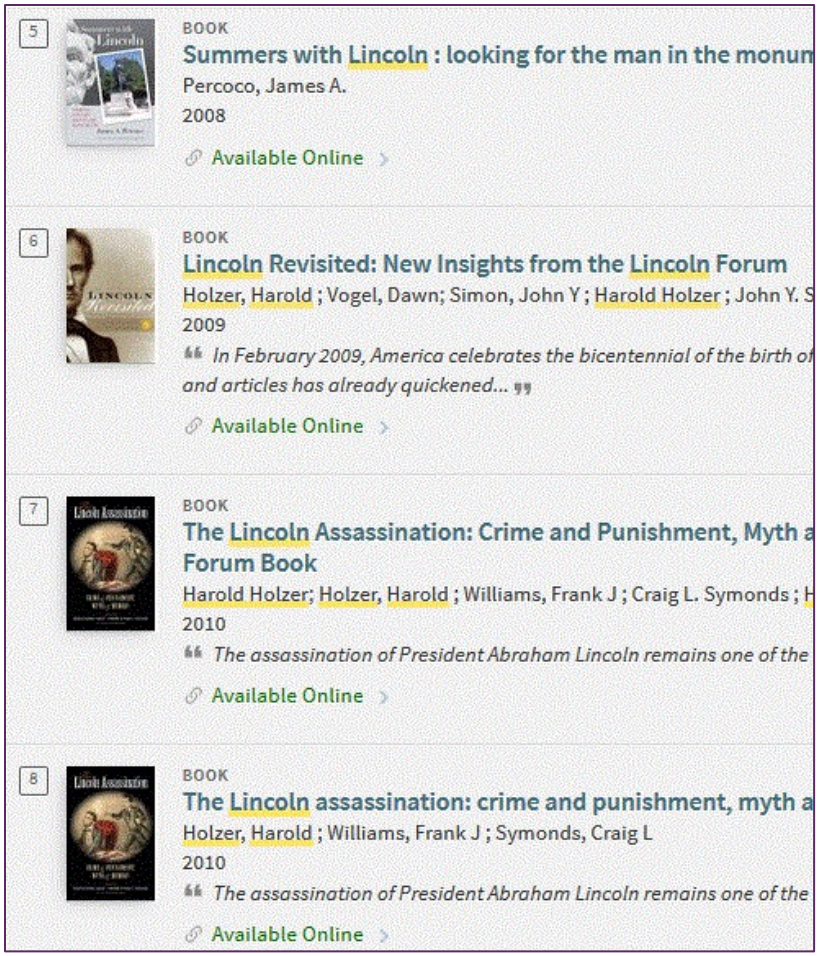
3. CDI Suppress sending citations to CDI setting- "Do not show as Full Text Available in CDI even if active in Alma."

- Why change?
- To declutter search results by reducing very similar citations going into CDI.

- Less exact duplicates in search results.
- Must rely on CDI citation sources you can't turn off.

Duplicates in brief results





4. "CDI Only Full Text activation"

- Means send citations to CDI only. Don't use portfolios in ranking results.
    - Have to use for database e-collections.
    - Why change if a full text package or aggregator? Library doesn't get the full text but want to use the indexing/citations.

    - What search behavior is changed? (after the overnight CDI jobs)
        - Get more citations and better-quality ones (potentially) but more chance of no full text to link to and more ILL requests.

Ex Libris new and revised documentation on CDI

Note: All I-Share Libraries are Easy Active for CDI and always have been. Ignore any text only about “Fully Flexible” options.

See “Documentation and Training” (English) section in
https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index

Chart on settings recommendations with examples:
https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_(English)/CDI_-_The_Central_Discovery_Index/045CDI_Collections_Types_and_how_to_activate_them_for_discovery

Recorded Webinars: especially Feb. 16 on “Settings”:
https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_(English)/Recorded_Webinars_and_Training

Ex Libris new and revised documentation on CDI

CDI Tips and Tricks:
https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Documentation_and_Training/Documentation_and_Training_(English)/CDI_-_The_Central_Discovery_Index/090CDI_Tips_and_Tricks

CDI Collections List:
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/060_Alma_Single_Activation_Source_for_CDI/050CDI_Collection_Lists_for_Alma_Customers

CARLI CDI Testing Example Recording sheet

- To Edit CDI settings, need roles:
  - CDI Inventory Operator
  - Electronic Inventory Operator

- Be Consistent: Use the same web browser, internet service provider, and also use private or incognito windows to minimize effects of caching data.

- Timing: Changes to CDI settings take 48 to 72 hours to be reflected in Primo VE.

- Example Tracking Sheet: https://www.carli.illinois.edu/sites/files/files/CDI%20changes%20checklist.docx

Questions?

Join us July 8 and July 22, 2021 at 2pm for another Office Hour.

Contact CARLI at support@carli.lllinois.edu