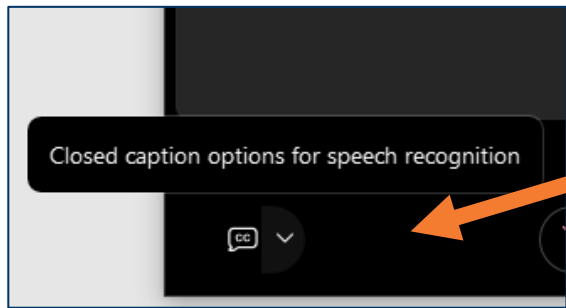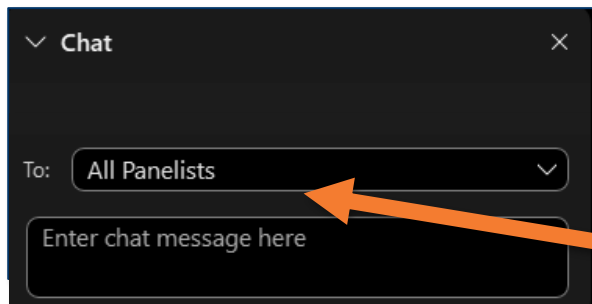**Alma Insights**

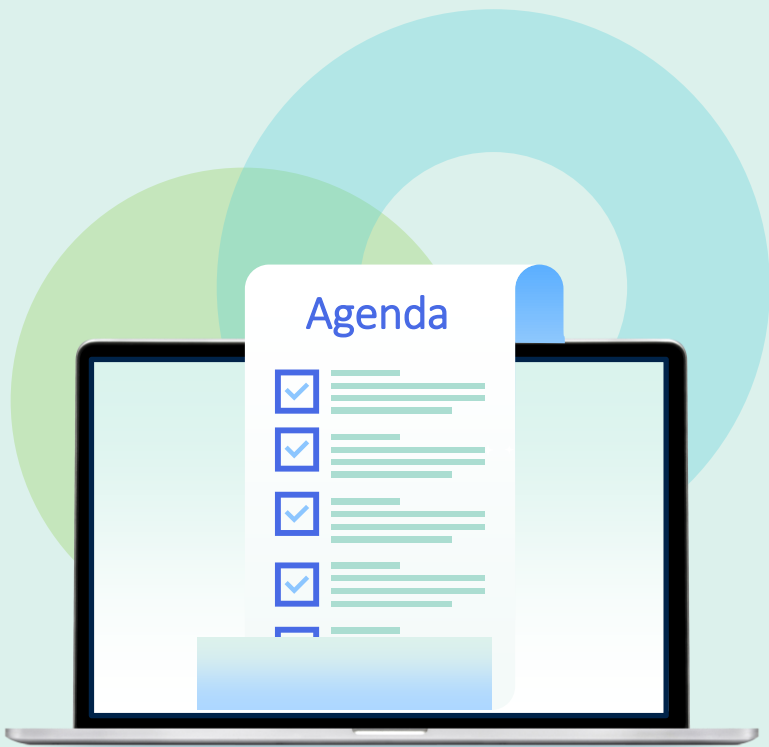# CDI Activation: EasyActive and FullyFlexible

Kevin Lane-Cummings
Jenny Draeger
Customer Education Team

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A few points about WebEx

- Technical issues? Exit and rejoin the WebEx session

- Submit questions via WebEx Chat: Select **All Panelists** in the **To:** dropdown menu

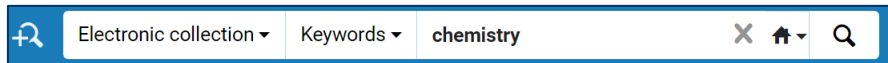- Turn captions on and off in the lower-left corner of the WebEx screen

- **Which CDI Activation Model Do You Use Today?**
- Primo Discovery and CDI
- How EasyActive and FullyFlexible Activate Resources in CDI
- Pros and Cons of Each Method
- How to Switch to EasyActive

Agenda

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Is Your Alma on EasyActive or FullyFlexible?

In your Alma, perform a search:

1. Electronic Collections in IZ
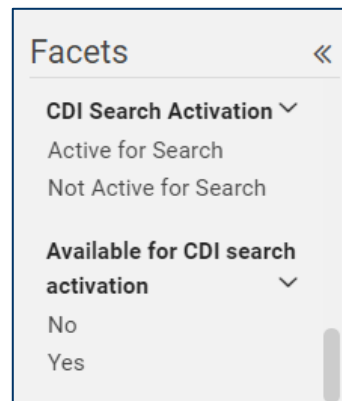2. Keywords: [any general topic]

3. On Results page, look for these Facets:
   - CDI Search Activation
   - Available for CDI search Activation

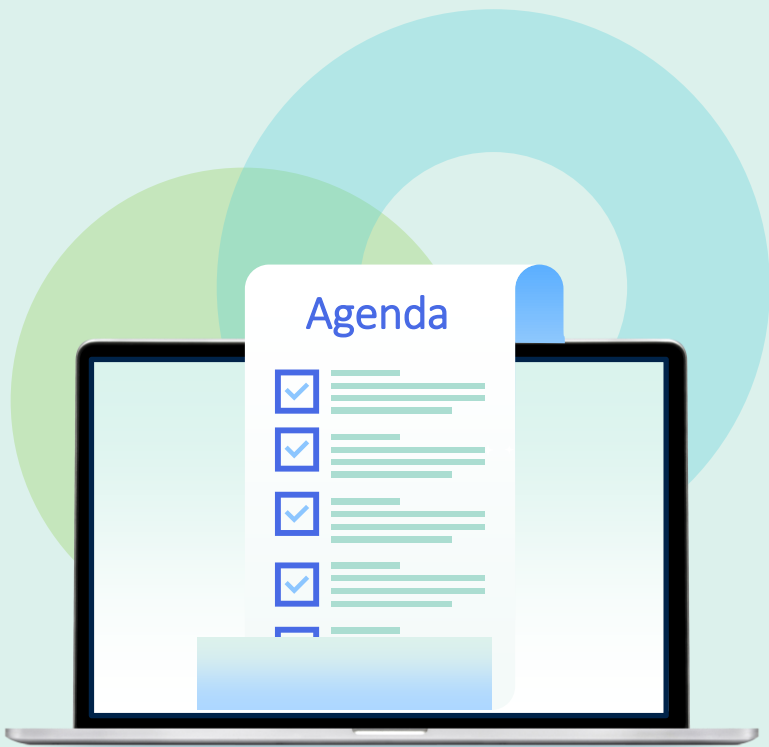One or both facets → **FullyFlexible**

Neither facet → **EasyActive**

If You Have EasyActive ... (or if you have Summon)

**Congratulations!
You are done!**
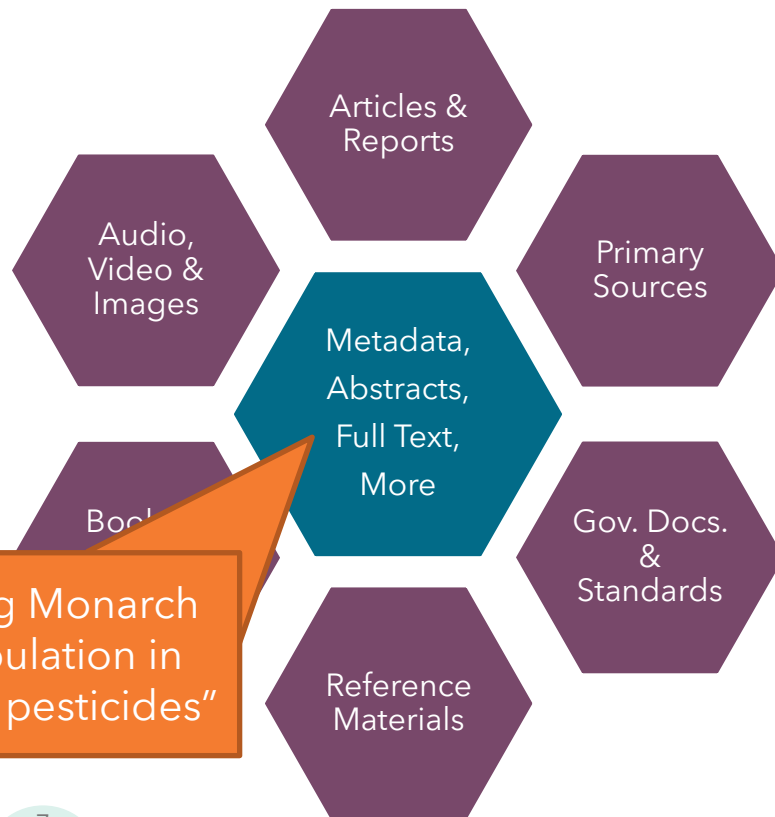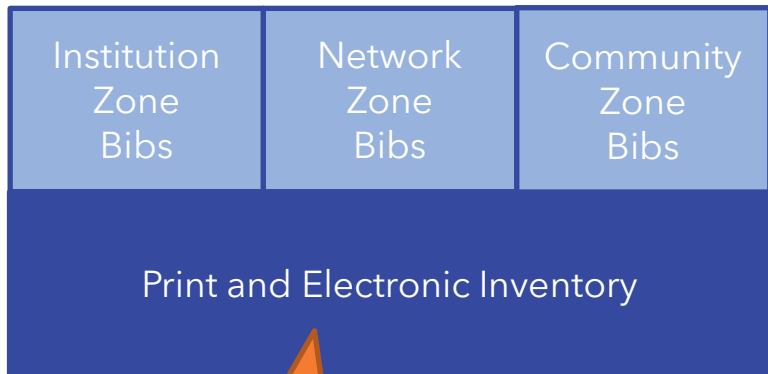
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- Which CDI Activation Method Do You Have?
- **Primo Discovery and CDI**
- How EasyActive and FullyFlexible Activate Resources in CDI
- Pros and Cons of Each Method
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Agenda

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Primo VE Data Sources

Central Discovery Index (CDI)
5 Billion+ Records

Catalog Records

Institution Zone Bibs	Network Zone Bibs	Community Zone Bibs
Print and Electronic Inventory		

Butterfly Magazine 2001-2015

Articles & Reports

Audio, Video & Images

Primary Sources

Metadata, Abstracts, Full Text, More

Boo...

Gov. Docs. & Standards

Reference Materials

"The declining Monarch butterfly population in Mexico due to pesticides"
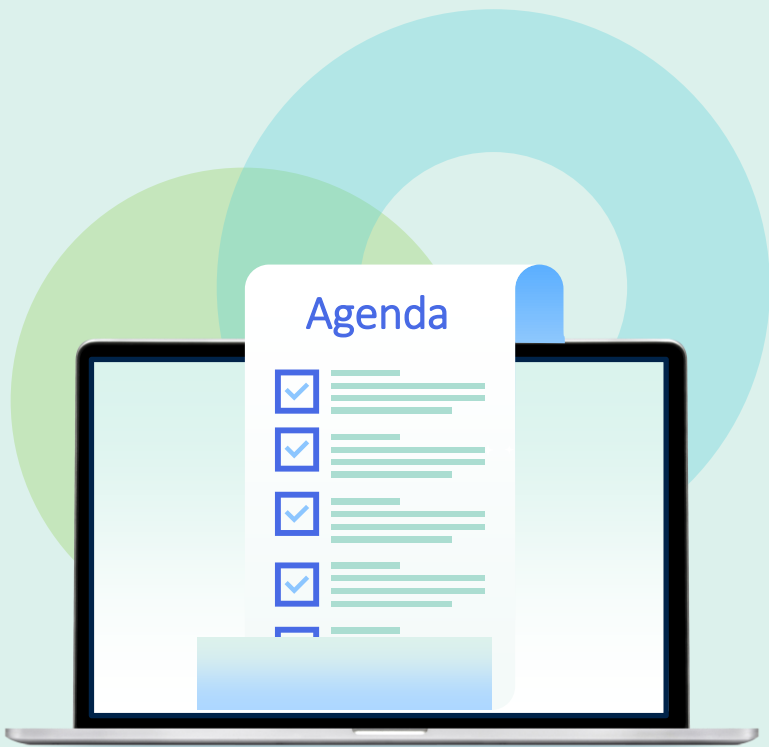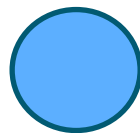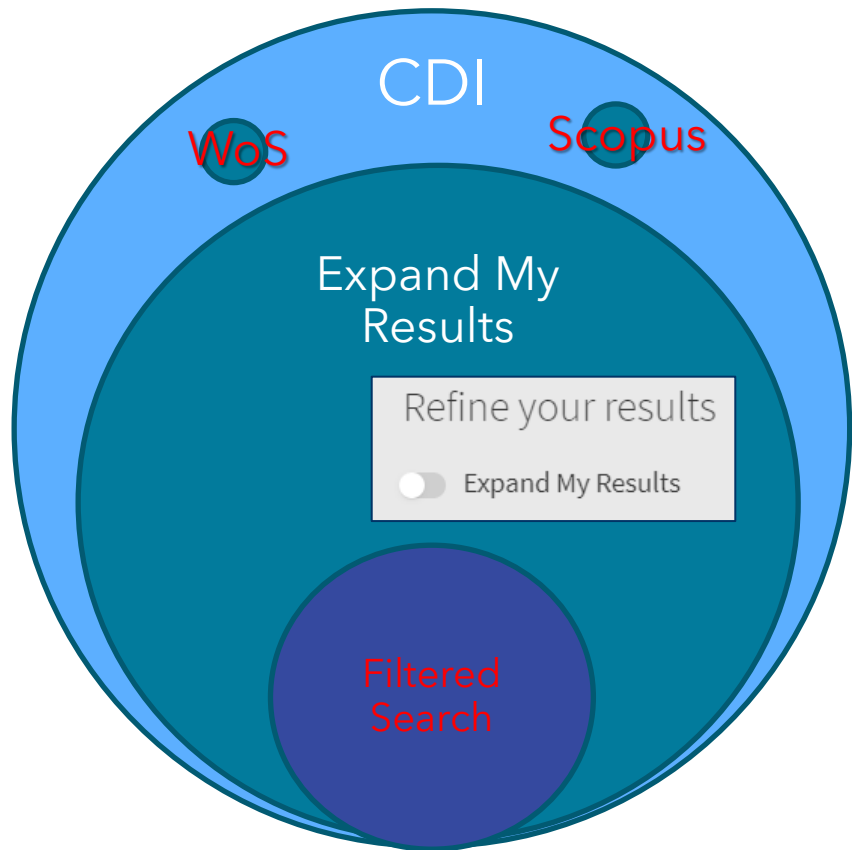
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Agenda

- Which CDI Activation Method Do You Have?
- **Primo Discovery and CDI**
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What's in my CDI with EasyActive?

CDI

WoS   Scopus

Expand My Results

Refine your results

⬤ Expand My Results
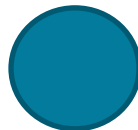
Filtered Search

CDI:
- Entire Central Discovery Index

Filtered Search:
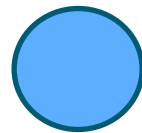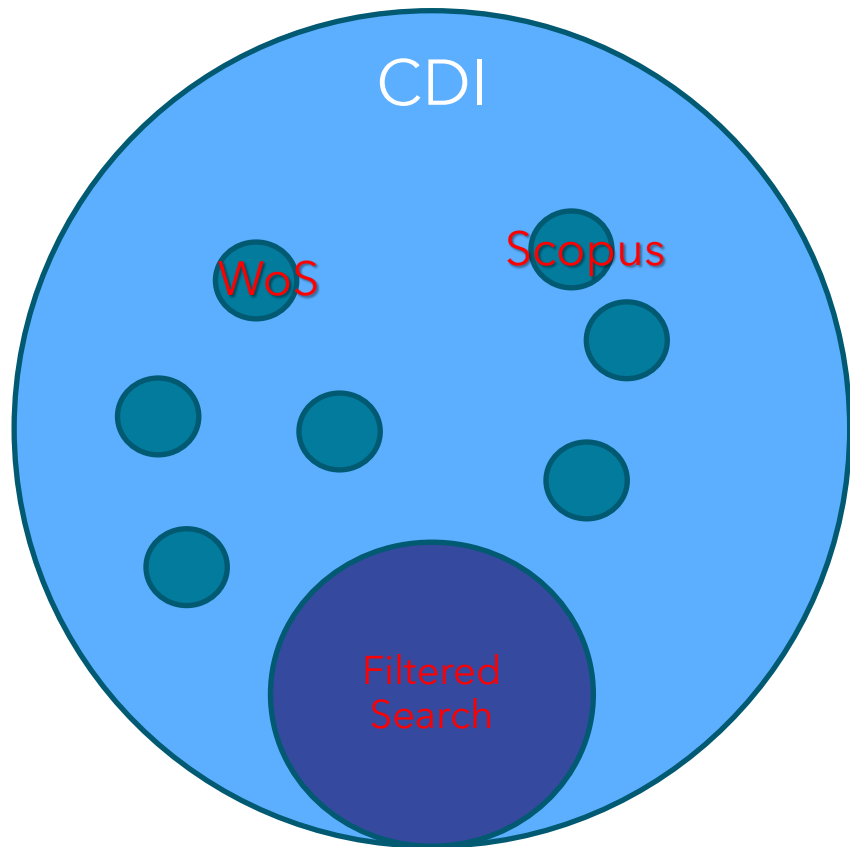- Your available online content

Expand My Results:
- Free-for-search A&I content
- Your subscribed A&I content

NOTE: Content in red must be activated in Alma to be discoverable in Primo VE

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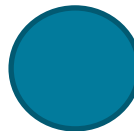
What's in my CDI with FullyFlexible?

CDI:
- Entire Central Discovery Index

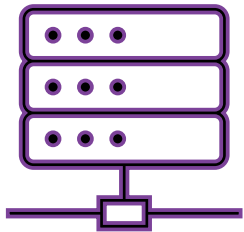Filtered Search:
- Your available online content

Expand My Results:
- Your subscribed A&I content
- **Your Free-for-search A&I content**

NOTE: Content in red must be activated in Alma to be discoverable in Primo VE.

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Why Is The FullyFlexible Model Offered?
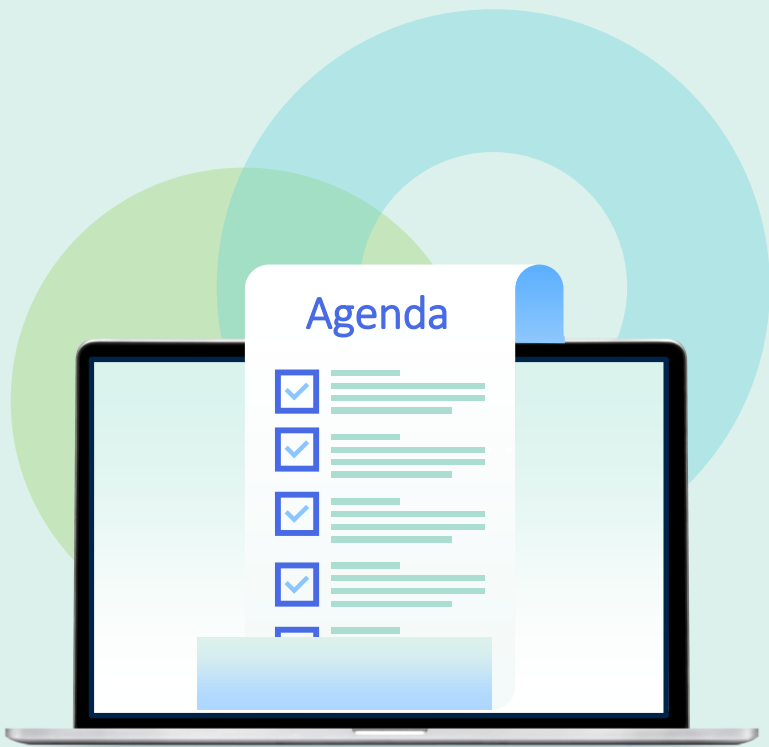
Primo Central Index (PCI)

All A&I content must be activated, even if free-to-search

Central Discovery Index (CDI)

FullyFlexible
(for migrated Primo implementations)

EasyActive
(for new Primo implementations)

Agenda

- Which CDI Activation Method Do You Have?

- **Primo Discovery and CDI**

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Activation Model Pros and Cons

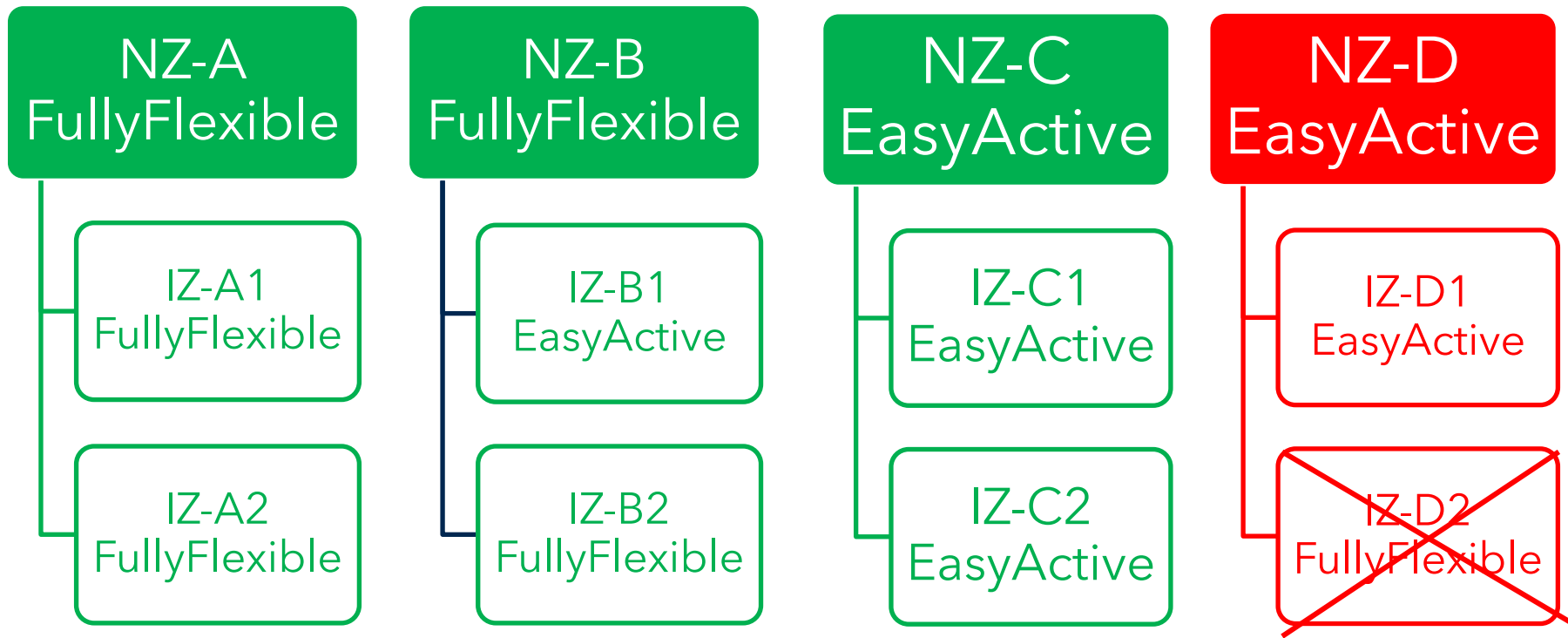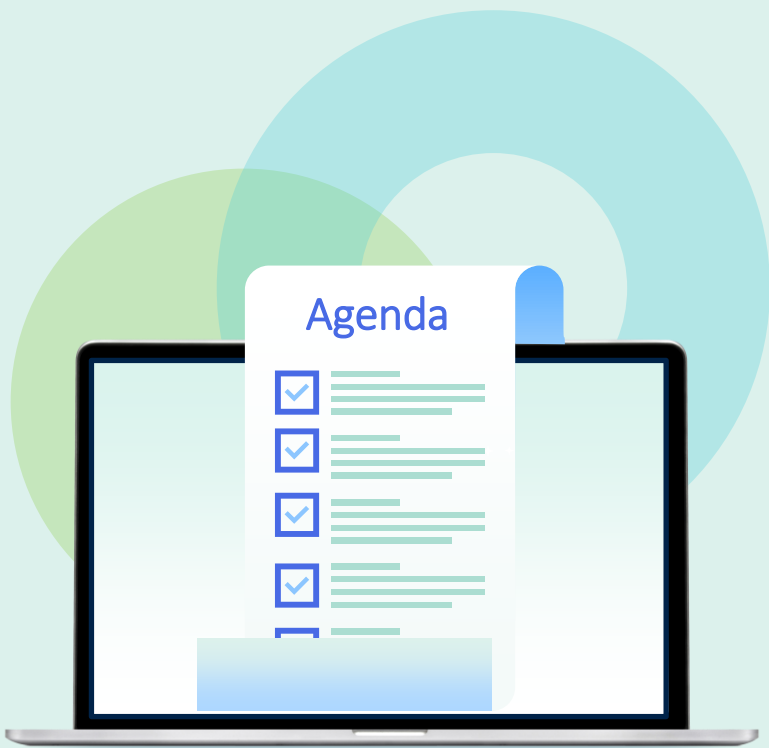| EasyActive	FullyFlexible
✅ The full range of CDI content is discoverable (15,000+ collections with free search rights).	❌ Discoverability of CDI content is restricted to only activated collections (typically < 1,000).
✅ You only need to activate your "available online" content in Alma.	❌ You need to activate your "available online" content plus your "available for search" content in Alma.
✅ Newly added CDI content is discoverable in expanded search automatically.	❌ You need to monitor release notes for new CDI content and activate it as needed for expanded search.
❌ You cannot control what CDI content is discoverable in expanded search.	✅ You can specify what CDI content is discoverable in expanded search by activating only collections of interest.
❌ Patrons may not be able to obtain all material via ILL	✅ You can choose to only activate collections with content types likely to be available via ILL (for example: books and journals).

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Should You Switch?

- EasyActive → no (library) work to maintain

- FullyFlexible → more (library) control; lots of (library) work to maintain.

- Have you been maintaining/adding A&I databases?

- Difference for patrons: Only when they "expand my search"

Considerations for Consortia with a Network Zone (NZ)

Agenda

- Which CDI Activation Method Do You Have?
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How to Switch to EasyActive

Submit a Support ticket asking to switch from FullyFlexible to EasyActive

Support will then send a report explaining what will change in Alma when you switch.

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Changes in Alma After Switching

- All CDI search activations will be removed.

- Any collections previously activated for search in CDI that are on the [EasyActive collection list](#) will be activated in Alma.

- All collections previously set to "Active for Full text in CDI only" will be activated in Alma.

- You can't switch back! (Previous activations are not stored.)

Question Time

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Thank you!

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