CDI Early Access Checklist (for testing)

What is being tested?

In the Early Access phase your Alma production environment is updated to

- Include the CDI related functionality
- Reflect your Primo Central search activations

This incorporates three areas of change that you may want to test and check during the enablement period and before going live with CDI for your patrons.

1. **Checking the Primo Central to Alma move**
   Ex Libris will update your Alma production environment (that Ex Libris will provide) with your Primo Central activations. A PC to Alma Activation Report (PC to CDI activation report) will be generated that will serve as the basis for the testing. The purpose of this part of the test is to make sure that the report is correctly reflecting activations after the move and that it is understandable and straight forward. You will compare your current Primo Central activations with your activations on Alma after the move in the report and ensure that the results are as expected.

2. **Familiarizing yourself with the Alma Single Activation workflows and new UI features**
   The purpose of this part is to make sure that the Alma interface changes for Single Activation are user-friendly and can be used to:
   a. View and filter on CDI related fields for collections included in CDI
   b. Activate, deactivate and update collections included in CDI
   c. View, update and export activations for Search in CDI
   d. Assign users different user roles and check their impact on the CDI functionality in the Alma interface:
      i. Electronic inventory operator
      ii. CDI inventory operator
      iii. Combined Electronic + CDI inventory operator

3. **Testing the CDI searching and full text availability functionality via the Primo Front End**
   Ex Libris will provide you with a dedicated URL that will use your production Primo environment but directs the search to CDI instead. This will ensure a direct comparison from the user's point of view is possible, and make it possible to check that searching and full text rights behave correctly and that the results display as expected.
   This part of the test also allows end to end testing, from activation of a collection in the Alma interface to checking it becomes searchable in the Primo Front End.

   Note that during the enablement phase your patrons continue to search in Primo Central. Alma will already publish to CDI so you can check that everything works as desired without affecting your patrons.

Part 1 - Testing the Primo Central to Alma move

Test notes

For this test you will use the PC to Alma Activation report. You can also check activations on your electronic resource lists in Alma directly but the reports provides you with one consolidated overview of what has been activated, and why. Please refer to the document PC_to_Alma_Activation_report.pdf for more details about the report and its content.

Some of the test scenarios ask you to randomly choose collections to check. Ideally you check many different ones, aggregator and publisher collections, small collections, big collections, and collections you might consider for any reason "difficult". The more you can check the better, but it should at least be 10 per test scenario below.

For consortia with a Central office set-up in Primo Central:

In case there is a 'network zone' in Alma, the Primo Central activations for the central office will be moved to the network zone on Alma. The move works in the same way as for the individual institutions. For the tests the same rules and checks apply and it is simply treated like an additional institution.

In case there is no 'network zone' in Alma, the Primo Central activations for the central office will be moved as discussed prior to the move with ExLibris.

Test scenarios and checklist

1. *Ensure that all collections that you have active in Primo Central are activated for search on Alma*

Randomly select 10 collections you had active in Primo Central. Check them in the 'PC to Alma Activation Report' and search for them in the Alma interface to ensure they are activated for search in CDI.

Collection	Comment

2. Ensure that the different types of collections are moved with the correct search and full text status to Alma

Use the 'PC to Alma Activation Report' to identify different type of collections in Alma and check they are correctly shown in the Alma UI after the move.

1.1. Collections that are using the link resolver to calculate full text availability and are already active in Alma

The collections will appear in your PC to Alma Activation Report as follows:
- The collections are marked as 'Activated' in the ***CDI Search activation status***
- The collections are marked as 'No change' in the ***CDI Full text availability status***
- The collections are marked as 'linkresolver' in the ***CDI Fulltext linking method***
- The Notes column contains text saying 'Collection was already active in Alma'

Collection	Comment

1.2. Collections that are using the link resolver to calculate full text availability and are not yet active in Alma

The collections will appear in your PC to Alma Activation Report as follows:
- The collections are marked as 'Activated' in the ***CDI Search activation status***
- The collections are marked as 'No change' in the ***CDI Full text availability status***
- The collections are marked as 'linkresolver' in the ***CDI Fulltext linking method***
- The Notes column contains text saying '***Collection was not active in Alma***'

Collection	Comment

1.3. Collections that are set to full text available on collection level and are already active in Alma

The collections will appear in your PC to Alma Activation Report as follows:
- The collections are marked as 'Activated' in the ***CDI Search activation status***
- The collections are marked as 'No change' in the ***CDI Full text availability status***
- The collections are marked as 'Link in Record' in the ***CDI Fulltext linking method***
- The Notes column contains text saying '***Collection was already active in Alma***'

Collection	Comment

1.4. Collections that are set to full text available on collection level and are not yet active in Alma

The collections will appear in your PC to Alma Activation Report as follows:
- The collections are marked as 'Activated' in the *CDI Search activation status*
- The collections are marked as 'Activated for CDI only' in the *CDI Full text availability status*
- The collections are marked as 'Link in Record' in the *CDI Fulltext linking method*
- The Notes column contains text saying '*Collection was not active in Alma*'

Collection	Comment

Part 2 - Alma Single Activation workflows and new UI features

The purpose of this part is to explore the new Alma UI features for Single activation and go through some workflows you previously handled in the Primo Central institutional profile, such as search activation or deactivation. Use existing Primo Central institutional profile workflows, or use a new collection you would like to activate for search, to test the new Alma UI features.

Below are some tasks we would like you to perform:

1. Assign users different user roles and check their impact on the CDI functionality in the Alma interface:
   - Electronic inventory operator
   - CDI inventory operator
   - Combined Electronic + CDI inventory operator

Use the documentation on what UI features are available depending on the Alma user role to understand what options are available/not available for each user role.

2. View and filter on CDI related fields for collections included in CDI

2.1 In the institution tab, use the basic search to search for electronic collections in Alma - or use '&&' to get a list of all electronic collections.
Or alternatively, use the PC to CDI activation report to find a collection that was activated for search during the move.

Check that collections indexed in CDI have the CDI fields included in the result list:

2 👥 **Central and Eastern European Online Library - CEEOL Journals**

Type: Selective package
Services: Full Text (Available from: 26/06/2018)
Interface name: central eastern european online library ceeol
Linking Level: Journal
Creation Date: 23/10/2017 16:44:29 BST
Modification Date: 26/09/2019 13:43:17 BST

In CDI: Yes
Active for Search in CDI: Yes
CDI Search Rights: Free
CDI Full Text Rights: Subscription (Linkresolver)
CDI Full Text Linking: Linkresolver
Collection ID: 61176986310002466

Click the facet CDI Search activation > 'Active for search' and check results (number of results and collections returned). All records should have 'In CDI' field set to 'Yes'.

Combine the facet with other facet options (e.g. 'Database')

2.2 Use Advanced search filters (e.g. 'Electronic Collection: In CDI = Yes') and check results.

3.   Activate for search or deactivate for search collections via the 'Actions' (only available in case user has the 'CDI inventory operator role').

4.   Update CDI related settings for collections included in CDI via the 'CDI' tab in the Electronic collection editor:
   - Change the search activation status
   - Change the 'We subscribe to only some titles in this collection' setting
   - Change the 'Do not show as Full Text available in CDI even if active in Alma' setting

5.   Export activations CDI related fields via the ⏩ option

6.   Activate a collection in Alma via the activation wizard and set CDI search activation at the same time.

7.   Remove the status 'Activate for full text in CDI only' via the 'Actions' and activate the collection in Alma for full text using the activation wizard afterwards.

Part 3 - Testing the CDI searching and full text availability functionality

To search CDI instead of PC, add the following string at the end of the search in your Primo production URL: '&searchCDI=true'

For example:

PC search:

https://explore.lib.uliege.be/discovery/search?vid=32ULG_INST:ULIEGE

CDI search:

https://explore.lib.uliege.be/discovery/search?vid=32ULG_INST:ULIEGE&searchCDI=true

When switching between the basic and advanced search, this string may be lost. It is recommended to check and add the string before continuing the test.

1. Filtered search

Method:

1.1 Check content of the result set: all records should display with Full text available indication.

Use different kinds of searches:

- Short topic search (e.g. 'Urban agriculture', or 'Waggle dance')
- Known item search using title (e.g. 'Development of a bike helmet safety program')
- Known item search using title + author (e.g. 'Pride and prejudice Jane Austen')
- Author only search ('Aldous Huxley')

1.2 Check blending of local and CDI results in result set: is the blending similar in PC and CDI? Is the result list a good mix of local records and results returned from the Central index?

1.3 Check ranking: Is the result list returned ordered by relevancy?

1.4 Check query expansion (e.g. 'Heart attack' will search also for 'Myocardial infarction')

1.5 Check 'Did you mean' functionality (e.g. 'Heart attach' will be corrected to 'Heart attack')

1.5 Check search history: In the 'My Favorites > Search history section, rerun a search that was performed before.

1.6 Check 'Match & Merge' versus 'Grouping': are there more or less duplicates in PC versus CDI?

List the searches you executed and the URLs used. Indicate in the 'Comment' column in case anything is incorrect in your view, describing what is wrong.

Search term	Type of search	URL - PC	URL - CDI	Comment

2. Record display

Method: Check the following record display features by comparing the PC and CDI search results:

2.1 Brief display of search results

2.2 Full display of search results

2.3 showPnx option in Full display – this option can be tested by:
- removing '&context=PC' from the URL of the Full display, and adding '&showPnx=true'

2.4 Peer review indication

2.5 Open Access indication

2.6 Resource types

Note: new resource types missing from the local Primo environment will need to be added in Primo production environment

2.7 Snippets

2.8 Actions: Permalink, Save this item, Email, Citation, RIS, Refworks, Endnote, Easybib

2.9 My Favorites

2.10 Sort

2.11 Top level facets

2.12 All other facets except the resource type facet (not yet ready for testing)

PC PNX ID	URL - PC	CDI PNX ID	URL - CDI	Comment

3. Expand search

Method:

1.1 Check content of the result set (not all records should display with Full text available indication)

Use different kinds of searches:

- Short topic search
- Known item search using title
- Known item search using title + author
- Author only search

List the searches you ran and the URL used. Indicate in the 'Comment' column in case anything is incorrect in your view, describing what is wrong.

Search term	Type of search	URL - PC	URL - CDI	Comment

4. Advanced search

Method:

- use different search options (all except resource types)

- check content of each result set

List the searches you ran and the URL used. Indicate in the 'Comment' column in case anything is incorrect in your view, describing what is wrong.

Search term	URL - PC	URL - CDI	Comment

5. Full text availability indication

Method:

Check the Full text availability indication in CDI, by comparing PC and CDI search results for:

- Title level rights collections
- Collection level rights collections
- 'Full text in CDI only' collections

PC PNX ID	URL - PC	CDI PNX ID	URL - CDI	Comment

6. Full text linking

Method:

Check the Full text linking for different kind of records in the CDI search results. Check records that use:

- OpenURL linking
- Link in Record type of linking
- If available in the institution: 'Primo template' linking (collections from 'Naxos' and 'Alexander Street Press' can be used for this type of linking)

Additionally, check that proxy functionality remains the same as in PC.

PC PNX ID	URL - PC	CDI PNX ID	URL - CDI	Comment

7. Guest and signed in users

Method:

Check that guest users do not get results returned from 'Restricted for search' databases and do not see 'Times Cited' information.
Check that signed in users get results returned from 'Restricted for search' databases and do not see 'Times Cited' information.

Search term	URL - PC	URL - CDI	Comment

8. Language testing

Method:

Use search terms in different languages, with different character sets, or search terms including diacritics. Check the content of the result set, and pay special attention to the following topics:

- Search
- Result display
- Sort
- Saving records in My favorites

Search term	URL - PC	URL - CDI	Comment

9. Additional information

CDI resource types and how to ensure there is no duplication of values in the Resource type facet for local and CDI resource types:

https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Product_Documentation/Central_Discovery_Index/Resource_Types_in_CDI