

## Testing the Central Discovery Index (CDI)

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At the start of enablement, I found myself struggling to figure out the best way to test the Central Discovery Index. After some trial and error (big thanks to Brian Kern for help), I developed a more focused plan for testing CDI. First, I defined some areas that needed to be tested. This is just a guideline. Every institution will have different configurations and different needs.

### Testing points

<p>Types of searches</p> <ul style="list-style-type: none"> <li>• Short topic search e.g. 'third molar extraction', 'public health education'</li> <li>• Known item search using title e.g. 'Cardioprotection against acute myocardial infarction'</li> <li>• Known item search using title + author e.g. 'molecular cancer mendelsohn'</li> <li>• Author only search e.g. 'Aldous Huxley'</li> <li>• Boolean e.g. zombies AND (plant* OR frog* OR ant*) NOT (gam* OR videogam*)</li> </ul>	<p>Expand my results (where appropriate)</p> <ul style="list-style-type: none"> <li>• Review brief display elements</li> <li>• Review full display elements</li> <li>• Rights issues?</li> <li>• Access issues?</li> </ul>	<p>Display -- Brief</p> <ul style="list-style-type: none"> <li>• Relevancy -- in particular are there collections that is causing problems with relevance.</li> <li>• Fields displayed</li> <li>• Snippets</li> <li>• Indicators (Peer Reviewed, Open Access, etc)</li> <li>• Resource Types (in the results list)</li> <li>• Facets</li> <li>• Sorting</li> <li>• Actions</li> <li>• Citation trail</li> <li>• Availability statements</li> </ul>
<p>Display -- Full</p> <ul style="list-style-type: none"> <li>• Resource Types</li> <li>• Fields displayed</li> <li>• Snippets</li> <li>• Related resources (e.g. other chapters of books)</li> <li>• Indicators (Peer Reviewed, Open Access, etc)</li> <li>• Services</li> <li>• Actions</li> <li>• Citation trail</li> </ul>	<p>Linking</p> <ul style="list-style-type: none"> <li>• Article level</li> <li>• Portfolio level</li> <li>• Collection level</li> <li>• Link resolver</li> <li>• Link in record</li> <li>• OpenURL</li> </ul>	<p>Simple search &amp; Advanced Search</p> <ul style="list-style-type: none"> <li>• Boolean searches</li> <li>• Wildcards</li> <li>• Quotation Marks</li> <li>• Query expansion via controlled vocab (e.g. Including "myocardial infarction". Just search heart attack)</li> </ul>

Next, I set up a spreadsheet that everyone at my institutions could edit and update. This is a sample. Again, this is a guideline. Every institution will have different configurations and different needs. Also, I prefer to err on the side of a little too much detail when testing.

## Testing spreadsheet

Search Type	Rights Level	Linking Level	Collection	Portfolio	Search Terms	Comments	Location	Tester	URL - PCI	URL - CDI	PCI docID	CDI docID	PCI Source	C S
simple - boolean	n/a	n/a	n/a	n/a	zombies AND (plant* OR frog* OR ant*)	Looking at relevancy Confused by how Primo handles relevancy with wildcards and boolean		LMM						
simple - boolean	n/a	n/a	n/a	n/a	zombies AND (plant* OR frog* OR ant*)	Found while relevancy testing Conference Proceeding link in GetIt for PCI not for CDI no GES in CDI (probably SAR related)		LMM						

Please contact me if you have any questions or suggestions for more testing areas.

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