

EBSCO Sherif Meeting, EBSCO Offices, New Barnet

21 June 2018

DRAFT MINUTES – NOT YET FOR WIDER CIRCULATION

Present:

Emma Hollinshead, Aston University (via WebEx)

Helen Buchanan, Imperial College

Cathryn Peppard, University of Greenwich

Julie Cleverley, Leeds Beckett University (via WebEx)

Elizabeth Gillespie, University of Liverpool (via WebEx)

Sarah Robbins, Liverpool John Moores University (Secretary) (via WebEx)

Fiona Bowtell, Open University (via WebEx)

Sarah Thompson, University of York (Chair)

Andrea Davies, EBSCO Information Services

Richard Bramwell, EBSCO Information Services

Steve Giannoni, EBSCO Information Services

1. Apologies for absence:

Amanda Quimby, Kerry Hadaway, Liam Sullivan, Nikki Rowe, Geraldine O'Beirn

2. Welcome and Introductions; Membership update

Liam Sullivan is stepping down from the group as he is leaving Edge Hill to join Sarah Robbins at Liverpool John Moores University, but we may well see him again at a future meeting in his new role. The Chair will check whether there is anyone at Edge Hill is intending to replace Liam on the Group, but will otherwise go back to people who have previously expressed an interest in joining.

Amanda Quimby is handing over to another colleague at the University of Birmingham, Helen Handley.

3. Minutes of the last meeting, December 2017

3.2 re Limiters. **Action: RB to follow up with Adam Walsh and cascade. This action was carried over from the last meeting**

3.3 Flipster **Action: ST to e-mail the Sherif list regarding interest in Flipster and title suggestions, and also regarding Enhancement requests. This action was carried over from the last meeting.**

3.6 regarding multiple institutions, ST has done some work to identify issues raised by more than one institution and has flagged these with AD.

4C Admin passwords expiring without notice. **Action: SG to investigate whether a notification email is possible. This action was rolled over from the last meeting.**

5. ST confirmed that following advice taken from Sherif, group members would not be willing to sign confidentiality agreements; group members understand this might mean that some EBSCO initiatives in the early stages of development will not be shared with

the group. Sherif prefer vendors to share as much as possible but appreciate that sometimes things need to be kept confidential when in development, therefore it is perfectly acceptable to redact minutes as is sometimes the case with WoS/Edina.

The issues regarding accessibility and testing from the last minutes would be clarified in today's presentations.

The minutes of the previous meeting had only been circulated two days previously, so members had not had much time to review them.

Action: Group to review by 5th July 2018 the previous minutes and feedback to ST any queries of errors so they can be published

4. Sherif users' issues (see separate document)

The group asked how are common issues, both UK and globally, addressed?

Monthly/quarterly reports go to Gareth Smith. Abid is mainly dealing with UK queries, so also has a good overview of common issues. Andrea explained that a case portal is currently being designed, and agreed to put forward the group's suggestion that enhancement requests should be viewable by all customers.

EBSCO Product Management are keen to have closer links and more engagement with the group and the wider Sherif community. The possibility of a webex call with EBSCO PM between each f2f meeting was discussed and thought to be a good idea.

EH asked for clarification on the difference between an enhancement and as service issue/incident

An Enhancement - not current functionality, but has been requested by one or more members of the EBSCO community

A Service incident - something that is supposed to work, but doesn't

Agile development practices mean that EBSCOhost can now be updated fortnightly. SG stated that he wants to get Product Development more engaged in this process. If issues are not resolved to client's satisfaction, we should be referring them back to EBSCO for accountability.

As EBSCO have addressed the user issues with individual libraries, the group agreed not to review the document line-by-line. Andrea reiterated that case numbers were needed in order to look into any issues raised, and that libraries should let her know if anything had not been resolved satisfactorily. Generally, if a case number has SI after it, this cannot be dealt with in isolation and will be escalated internally within EBSCO. Therefore these will take longer to resolve.

EG asked about the issue of different search result numbers and the results on the 1st page and actual number not being the same (due to de-duping). Need to ask to be able to navigate to the last page. The enhancement number is *ER158157* – submit a request to be add to that case.

EG asked whether the EBSCOhost problems were a knock on effect of GDPR? It is noted that EBSCO made a change as a result of the law change and it appears to have caused issues with Proxy servers. These are 3rd party products but EBSCO are sending the information they have to customers.

5. Access to the CRM

ST asked again if all members of the group can have access to the CRM.

Action: ST to supply Andrea with an updated list of members

Andrea confirmed that requests older than a year won't show up.

Andrea gave thanks for the complimentary responses about her team in a recent survey of English and Irish customers. She was pleased to report an increase of at least 2% on every point

6. EBSCO Update, including an online call with US Product Management colleagues

Eric Van Gorden - Usage consolidation and analytics

Want users to have quicker access to data and help to transform huge amounts of raw data into "actionable insights".

Between 20-200 hours are spent doing this in libraries where usage consolidation (or similar) isn't used – an average of 2.4 FTE spent collecting and using raw data.

Workflow for SUSHI

1. Login, 2. Download, 3. QL, 4. Building reports, 5. Analysis, 6. Decisions

Workflow for EBSCO Usage Consolidation

2. 1-4 is automated, freeing the end user up to concentrate of 5-6

It covers 400 publisher platforms, 17505 COUNTER Reports

COUNTER R5

R4 data can be uploaded and work with R4 data.

New features will be released at the end of 2018

EBSCO and non-EBSCO content all in one place.

Eric Van Gorden - EBSCO Knowledge Services

EBSCO are going to take the KB-related admin products into other interfaces, including those of other ILS providers who are willing to integrate. The aim is to have a single KB across multiple products e.g. HLM from within another system; this is live now for holdings information, with licence terms coming later. Customers can trial now.

Jill Power – Accessibility

Jill presented a 6-12 month accessibility roadmap for the platform and the content.

It is easier to integrate text to speech and transition tools if content is XML/structured format, and therefore EBSCO are increasing the HTML content for journals and the epub content for books. They are also starting to introduce DRM-free ebooks and unlimited chapter downloads. Publishers are working to include page numbers in XML.

Responsive design: all pop-ups fully functional over 200%.

Jill explained that EBSCO take an accessible-first approach. They use a variety of different accessibility evaluation tools (WAVE, Code Sniffer, Axe) in addition to undertaking manual tests with JAWS etc. Everything is tested before release, and in the future this will also include being run past an Accessibility Panel of students.

EH asked whether any direct links to EDS are planned, to avoid having to tab across to the EDS login; this will be discussed further offline.

EBSCO are going to be moving everything to the Amazon Web Services platform – new products and services are already deployed from there.

7. Any other business

8. Date of next meeting – TBC

9.1 Discussion centred around whether the combined meeting/webinar format worked. Moving forward it is likely that each year there will be 1 London based meeting (at EBSCO Head Office or other location), and 1 more central meeting, possibly supplemented by webexes. Next meeting would focus on enhancement requests and product management.

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