sherif Proquest Enhancement Group

3rd December 2018. 10:30 for 11:00. 15:30 finish.

Manchester Metropolitan University, All Saints Library, Manchester, M15 6BH   0161 247 6106

Minutes

1   Attendees
- **Sherif member libraries**
  - Adam Edwards – Middlesex University London (Chair)
  - James Allen – University of Salford
  - Nicola Walton – Manchester Metropolitan University
  - Rachel Scott – University of Reading
  - Sarah Lowe - University of Brighton
  - Wendy Mears – Open University (note taka)
  - Amanda Quimby - University of Birmingham
  - Michelle Perrott – University of Northampton

- **Proquest/ExLibris**
  - Lynda James Gilboe
  - Sophie Panagi
  - Cristina Blanca Sancho
  - Scott McCarthy
  - Alex Follett

2   Apologies
- Gavin Brindley – Coventry University

3   **EPUG-UKI meeting (**brief update provided by Adam on behalf of Gavin)

ACTION All: In Gavin's absence, please send any questions to him via lis-sherif-proquest@jiscmail.ac.uk.

4   Summon – duplicate entries, sidebar (University of Reading)
- Duplicate entries in Summon. Ghost references created duplicating the working record which then do not work, putting students off in training sessions. At the moment, we're reporting each of these instances separately to ProQuest, who seem to fix the broken URL, but the duplicate entry still remains. Why is that and is there anything that can be done to stop it from happening?
    a. Case 00607660 – an example where the linking issue was resolved but the two references still appear in our Summon index.
    b. Case 00615906 – an example where we currently have two entries for the same article in Summon, one of which doesn't resolve. Both of these appear to go to the same journal within the same Serials Solutions database.

- The Summon sidebar is still causing problems for a number of our platforms. See case 00614114. We received notification that Wiley was now working with the sidebar, however, it doesn't appear to have worked for us.. We seem to be adding a growing number of databases to the exclusion list. I realise that we do have the option to not use the Summon sidebar, however, it is useful for those databases it does work with as it provides our users with additional information. What progress have ProQuest made in working with publishers to enable the Summon sidebar to display correctly on their platforms? Is there anything we can do to help?

ACTION: **Alex to look into these two cases and feedback to Reading.**

5   Primo and EndNote (University of Plymouth)

- Any book on Primo being exported into either version of EndNote carries the place of Publication into the publisher field as well as putting it into the place of publication field. This has been going on for a couple of years now. Fixed but as soon as either party has an upgrade it goes wonky again.

ACTION: **Adam to feed back to Plymouth they need to resubmit these cases as they look to have been closed. ProQuest need more data. [Done].**

6   Primo and Proquest journals (University of Plymouth)

- The connector of Primo with Proquest (Arts Bib) databases is not picking up the physical journal copy when there is an e-version as well.
- Alex could not find the case when she tried to investigate this.
- **ACTION: Adam to ask Plymouth to resubmit. [Done].**

7   Primo VE: Parity of functions with the older version and with Summon (Middlesex University)

- What proportion of user have moved to Primo VE? Will everyone have to? When?
- To what degree is Primo VE still a work in progress (bugs etc)?   When will achieve parity with the old product?
- When is parity with Summon and Primo data coming? If it is already here, that is not our experience. Is it the different approaches (PCI) that cause us problems?

Alex provided some background on this. PVE was released in Aug 2017. There are now some 110 customers using the product; 32 of those are new to the product, rather than upgrading from Summon. There are 20 more customers scheduled to take up PVE in 2019. In the first half of 2019 a development roadmap will be released outlining remaining functionality to be developed.

8   Primo VE and Citation Style Language (Middlesex University)

- This is coming in January 2019. We understand this will enable us to set our preferred default style Cite them Right – Harvard and add in other styles we use e.g. IEEE. Please can we have more detail on this if available?
- Will there also be improvements to improve the consistency of referencing, e.g. journal articles with dates being turned into a reference showing (n.d.) ie no date.

Sophie provided more detail. ProQuest will be providing an enhancement for users to implement an y style available in Citationstyles.org. This uses the same code as Mendeley, Zotero etc,. Will include Cite Them Right Harvard options.

9   RefWorks Citation Manager for Mac users
- An update to RefWorks Citation Manager (RCM) Add-in for Word 2016 would be helpful. Recently MAC Book users have had problems downloading and then locating the older Write n Cite plug-in.
- Could we request a video or videos specifically for MAC Book users, showing:
    1. How to find and install Legacy Java software (depending on iOS and MAC Book version)
    2. How to locate Write n Cite toolbar and make this viewable.

There is no plug in for Macs. Scott demoed a workaround, which is available for version of Word 2016 and later. In word, got to insert> Add-in> Store> RefWorks, or click on the store icon in the Insert menu bar. Sophie provided a link to the [Knowledge Article](#) that provides more detail

10   EBookCentral's accessibility mode cannot be enabled on mobile devices (Kings College London)
- This information is buried in the [ProQuest Web Page about supported devices](#), where it states 'Accessibility Mode is supported on laptops and desktops only (not tablets or phones)' and 'gestures and accessibility are not supported on mobile devices'. I can see no obvious reference to this restriction on the [ProQuest EBookCentral LibGuide accessibility tab](#). Please can this be added?

Sophie: this has now been added.

- VoiceOver is infinitely easier to use on iPhones and iPads than it is on MacBooks or Mac desktops. For this reason, it is the preferred option for many visually- and print-impaired students. Can this be looked at?

Sophie has forwarded this on to the accessibility team and will chase a response after Thanksgiving holiday.

- Accessibility mode cannot be switched on by users of TextHelp Read & Write. Do ProQuest have any plans to fix this?
- Alternatively, could they revert to having text-to-speech available as an option online? Or is it technically impossible to accommodate text-to-speech software and screen-reading software at the same time?

Sophie waiting for an answer to this.

- On the positive side, JAWS users love EBookCentral. They can't sing its praises highly enough.

11 EBook Central: Timeout and metadata (University of Northampton)
- Issues with EBook Central showing a time out screen when users click on the link to the full-text of the e-books

- Concerned about the quality of the metadata provided by ProQuest.

ACTION: Northampton to raise a fresh case with screenshots including the URL displayed. Lots of other users (OU included) reported they were still experiencing this problem.

12 Oasis (University of Reading)
- We appear to have lost the functionality to "see inside" e-books on Oasis. This feature was very useful in helping us identify correct editions /titles to order when we had mismatching metadata. The "see inside this e-book" text is still visible, but clicking on it doesn't take you through to the e-book. Are there any plans to re-instate this functionality on Oasis, and if so, when?

ACTION: Reading to check their pop-up blockers are not affecting this service, then resubmit case if necessary.

13 BL API: Checking live availability of British Library items (Kings College London)
- We would like to see it for Aleph version 23. It only works with Alma and not Aleph at the moment. When will there be a version for Aleph?

Alex provided update: Aleph users are now a very small group and there are only 4 UK users – one of whom is the BL itself. This is therefore not a planned development.

14 Safari ebooks (Open University)
- **Access to the O'Reilly platform:** We only achieved resolution of the technical issues around EZProxy access by solving them ourselves. We expect to work with publishers and platform providers to set a new service up, but we don't expect to have to do all the technical work for them. Lack of support from our ProQuest account managers to escalate this issue with O'Reilly or to try to intercede on our behalf.
- **Access at individual title level:** The Alma target was promised in September, we got it middle November only with 17.5.k titles and is still incomplete. The 17.5k titles are not directly linkable because EZProxy configuration through Alma for individual titles is incorrect. We have raised a ticket with Ex Libris and O' Reilly. Our technical team has worked out what needs changing but have no access to make the changes. ExLibris and O' Reilly are now in possession of the information they need to fix this. The 17.5k titles are now visible in Primo, but we have had to make the view online link simply open the platform, then students have to search again for the title once on the platform home page.
- We simply need O' Reilly and Ex-Libris to open the ticket and make the changes we have already worked out for them!

Linda responded on behalf of ProQuest. This was not acceptable. They would look into an urgent fix for this with senior managers in the USA.
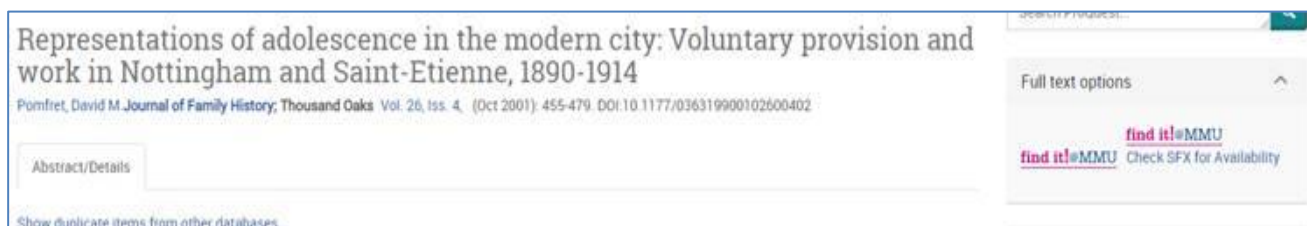
15 LION – Literature Online Premium (Coventry University)
- LION – Literature Online Premium with black writers collection. We have bought into the collection, at some cost, but it is not discoverable. There is nothing in knowledge bases for it and no way to surface it in our discovery tool at anything other than the very top level. I have asked our ProQuest reps about this but seem unable to offer anything and instead have told me to log a call with Ex Libris to say it is missing from the Alma Community Zone.

Cristina responded on behalf of ProQuest. There is an update to the LION interface that will be available from next week that should fix this. This new interface will be much easier to work with, to administer and for students. The two interfaces will run for a while concurrently.

16 Proquest database – find it links (Manchester Metropolitan University)

- ProQuest fixed an issue where our *find it* links were missing on the Proquest database. However, the fix has meant that we now have two links, one with the current link resolver and one with an old SFX link. Both currently lead to the same place (i.e. the content) but it looks messy. This is currently with ProQuest development

Scott responded on behalf of ProQuest- they are awaiting a fix from the US, but he was hoping to be able to look into this later this week. [Done: Fixed 6/12/18]

17 Proquest Medical Library (Queens University Belfast)

- We have an issue with Journal of Palliative Care, for which full text should be available via Proquest Medical Library. We carried out a detailed check for full text access and found that quite a few articles are not available. I have included a summary below. For example 53 articles are not available from the Autumn 1998 issue.
- We first contacted Proquest about a missing article on 13th August 2018 and have followed up
- with the information below. Proquest say they are acquiring the content.

Journal of Palliative Care	Problems with full text			
	Spring	Summer	Autumn	Winter
1998	1	0	53	3
1999	1	1	2	0
2000	1	4	2	1
2001	1	0	0	2
2002	0	1	0	0
2003	0	0	0	0
2004	1	0	1	1
2005	1	0	1	0
2006	0	0	0	2

Cristina responded : they have now tracked down some print sources to provide the missing content. She has no estimated delivery date but will update Queens as soon as she has.

18. Any other user issues

19. Matters arising from the minutes of the previous meeting held 28th June 2018

Attendees
- o   Adam Edwards – Middlesex University London (chair)
- o   Cristina Blanca Sancho - ProQuest
- o   James Allen – University of Salford
- o   Lynda James Gilboe - ProQuest
- o   Nicola Walton – Manchester Metropolitan University
- o   Robert Bley – Ex Libris (until 11:30)
- o   Wendy Mears – Open University (note taker)
- o   Scott McCarthy - ProQuest
- o   Sophie Panagi – ProQuest
- o   Gavin Brindley – Coventry University
- o   Rachel Scott – University of Reading
- o   Sarah Lowe - University of Brighton

1   Apologies
- o   Michelle Perrott – University of Northampton
- o   Amanda Quimby - University of Birmingham

2   Minutes from the previous meeting held 5th December 2017
- Approved.

3   ExLibris Alma and Primo (Middlesex University)
- Primo and Summon data: When is this being brought together?
  - o   Content is now 90% aligned: 10% outstanding is from smaller providers, and being progressed on a per request basis.
- Are there plans for closer integration of Primo and RefWorks, not least so Primo could use *Cite them Right Harvard* for our students? Harvard reference is displayed in Summon but not Primo. Is it available? Is it possible to modify the version?
  - o   **ACTION ProQuest will check and update**

CTR will be available soon

- When will Primo VE achieve parity of function with the legacy version?
  - o   By end 2018 all Classic Primo functionality will be available in Primo VE
  - o   Database recommender should already be available in Primo VE
  - o   **ACTION Robert Bley will check and update.**

4   Proquest: "Include duplicate documents" option in the advanced search (Salford University)
1.   The 'information' **i** button doesn't work.

2.   The option is hidden away and difficult to find.

3. When this is unticked, the display of the number of results found is inconsistent

   - For example, a command line search for *ab(nurse OR nurses OR nursing) AND ab(pre-registr* OR undergraduate* OR student*) AND ab(mentor* OR supervis* OR tutor*) AND ab("patient safety") AND la.exact("English") AND pd(>20080101)*
   - A student reports 'I keep getting 34 results on BNI, then when I try to see them it says 28 but only displays 22.'
   - Said student was rightfully confused – she needed to show the search and results in an assignment, and the inconsistent numbers made it look wrong.

4. Noted discussion last time on duplication and how this happens, one from A&I database, one from Full Text. Is there a plan for how to display this on the Proquest site?

   a. Cristina replied: deduplication explained – the system dedupes the page you are working on so the search result numbers decrease as you progress through list. This is confusing and ProQuest decided to disable this by default; it can be reset at Account level within the Admin module; users with individual accounts can set their own preferences.

   b. Worth noting that user stats show the DROP RATE from Advanced Search pages is huge; so ProQuest have tried to declutter Adv Search screens. Adv Search is really only for librarians – users do not use the functionality.

   c. **ACTION – Cristina to share this information more widely within the user community**

Dec 18 update: Cristina will consult with Salford over a trial infographic ProQuest have designed to explain searching

5   Proquest working with CORE (Science and Technology Facilities Council Daresbury)

- Jisc blog post about Proquest working with CORE to include it in their discovery products to facilitate access to Open Access resources: https://scholarlycommunications.jiscinvolve.org/wp/2017/12/14/enhancing-library-discovery-services-with-core-content/
- Is there an update on this?
    d. **ACTION – Cristina will update on this: Robert Bley will update offline**

Dec 18 update: ProQuest working on this but it is proving technically difficult.

6   Factiva authentication (Cranfield University)

- Significant issues with off-site access to Factiva (subscribed to via ProQuest) which they weren't able to resolve via the supplier or ProQuest (ProQuest Support team were very conscientious).
- Resolved by moving to EZProxy authentication for this resource. This seemed to be the only option available and wouldn't help institutions which don't have EZProxy available.
- Could it be suggested that a future enhancement to Factiva would be to improve their off-site access?
    o Sophie replied: she fed back remote access problems to Factiva; problem is specific to Factiva, in their hands to resolve. Factiva product aimed at corporate market – they are slow to implement improvements required by HE users. Noted that increasing numbers of corporate users are moving to single sign on.

7   Ebook central (Manchester Metropolitan University)

- Marc records need manually editing as they contain more than 1xISBN (unlike other suppliers). Is it possible to provide a record with only the EBook Central ebook identifier?

- Talis Aspire bookmarking issues with DDA MARC records sent by ProQuest: The records sent contain two 001 fields. There should only be one 001 field as a unique identifier. If we export the MARC records for the same titles from LibCentral they are fine. This issue seems to be only with the ones sent by PQ.
- Aggregator changes announcements: A member of staff is looking into how to/whether to have aggregator changes announcements, but has discovered that, unlike other titles, *ProQuest: Title list* –is not a list of changes. ProQuest do not seem to provide changes in a list; they do blog posts and I think you can request lists if you want the information. Wants to check that this is the case and we are not missing anything.
    - o Sophie replied: this is an OASIS issue, not a ProQuest issue. Coutts have changed their configuration files and the problem is now resolved.

8   RefWorks User Day, 18th June 2018
- Any issues from the day relevant to the meeting.
    - o Adam updated. New RefWorks will achieve functionality parity with old Refworks by end 2018. So 2019 will see lots more customers moving across to new Refworks.

    Gavin Brindley raised urgent issue of Open Athens authentication issues – customised configuration fix file is repeatedly corrupted by text editor.
    ACTION – Lynda will chase and urgent Coventry fix from Refworks colleagues.

    Noted that UK Federation needs to offer old and new Refworks as separate services.

Dec 18 update: Coventry fix now works.

9   No other issues raised.

10   Matters arising from the minutes of the previous meeting held 5th December 2017
- 8. Alexander Street Press DDA video discoverability (University of Birmingham)
    - o Birmingham University found that there is no available target for the videos.
    - o **ACTION Birmingham to raise a case so that a solution can be found. Might be able to move into SFX – contact member of team and let Robert know details of the case**
    - o **ACTION Cristina also recommended Marc Edit to help with this and will provide Marc Edit FAQs with the minutes**
    - o **Jun 18 Update –** ProQuest are working on a fix that should be ready ???

Dec 18 update: Birmingham now using Marc records.

- 10. Missing articles in ProQuest databases (University of Birmingham)
    - o Response from the team:
        - ▪ This does sometimes happen. They are working to resolve it via a number of strategies. Improvements expected next year
        - ▪ There is a team behind the scenes who constantly chase missing items.
        - ▪ Team provide short term solutions: troubleshooting and providing pdfs of articles.
        - ▪ Can occur when because a publication has been suspended.
    - o **ACTION A public note option might help. This suggestion has been taken back from the meeting by Cristina.**
    - o **Jun 18 Update –** now resolved.

11 **Proquest updates;** on Alma, Leganto, and new Esploro research management system. Updates on platforms (e.g. PAC database – Publicly Available Content - to surface more freely available content).

Noted that Support Centre updates provide up to date notifications of collections changes.

ACTION: Sophie to share link to support centre details to Wendy for adding to minutes.

ACTIONS: Scott M will identify how CASA authentication works with Google Scholar to assure user libraries their subscription access remains traceable, and feedback to user group.

Dec 18 update: Owing to GDPR data protection, it is not possible to identify individual users from CASA tokens, only their home institution. ProQuest can identify data mining and slow download speed to protect publisher data. Publishers seem happy with this.

ProQuest will contact Open University to discuss functionality changes of EEBO when upgrading Chadwyck-Healey interface.

19 Proquest and ExLibris updates

- Sophie outlined development roadmap for Refworks. More detail on the RefWorks Ideas Exchange In future RefWorks updates will be shared at EPUB UK group meetings. Lots of functionality planned to support systematic review. Still working on achieving parity of functionality in new RefWorks with old RefWorks. Once this is achieved they will be encouraging users onto new RefWorks.
- Cristina outlined product updates. Changes to the Video and Ebook interfaces, and AVON accessibility improvements. LION migration will be available from 10th December- PQ are trying to improve the first few screens. Author pages will be made more central to the delivery of the platform. The old interface will remain available until Summer 2019.
- EBookCentral: Ebook viewer will be able to be used to work with online content. Further details from week beginning 10th December. There will be improvements to the Book Detail Page. More Ebooks are DRM free
- Chadwyck Healey migrations. Early European Books took longer than expected. EEBO is next.
- ProQuest are setting up an Ebooks ideas exchange to facilitate user community requests for development.

20 Date of next meeting

- June 2019 in Northampton University's new Learning Hub.

Wendy Mears

04.12.2018