sherif Proquest Enhancement Group

13th December 2019. 10:30 for 11:00. 15:30 finish.

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Agenda

1   Attendees
- **Sherif member libraries**
  - Adam Edwards – Middlesex University London (Chair)
  - Nicola Walton – Manchester Metropolitan University
  - Wendy Mears – Open University (minutes)
  - Helen Monagle – University of Salford
  - Michelle Perrott – University of Northampton

- **Proquest/ExLibris**
  - Lynda James Gilboe
  - Cristina Blanca Sancho
  - Scott McCarthy
  - Robert Bley
  - Alex Follett

2   Apologies
  - Gavin Brindley – Coventry University
  - Amanda Quimby - University of Birmingham
  - Rachel Scott – University of Reading
  - Sarah Lowe - University of Brighton
  - Sophie Panagi – ProQuest

3   Welcome
  - Helen Monagle – University of Salford replacing James Allen

4   O'Reilly (former Safari) platform problems (Open University)
- **Links:** Deep links through to materials on the Safari platform were working, but then Ex Libris changed the base URL and an extra letter was inserted that broke them again.
  - 30/10/2019 changed from https://learning.oreilly.com & sso=$$SSO to https://lwww.safaribooksonline.com & sso=$$SSO (the I before the www broke all links)
  - 4/11/2019 changed from https://lwww.safaribooksonline.com & sso=$$SSO to https://www.safaribooksonline.com & sso=$$SSO (this means all links now work)

- o Fixed locally by our systems team. Not sure whether it remains an issue for other UK customers. Highlights the **interdependencies** between Ex Libris and provider platforms.
  - o Guessing that Ex Libris would not have made changes to the base URL unless asked to do so by O'Reilly. Changes need more thought and checking! It has taken months (almost a year) to get to this position.
- **Training** has now been scheduled by our O'Reilly representative, but we need to make sure they understand that we are not a special case. Issues we were reporting around usability and discoverability are typical of the sector's needs, and not unique to the OU.
- **Discoverability within standard Library Search**: Not enough to expect students to go to their platform and search. They need to support serendipity within standard search systems to enable us to get best VFM from our licensed resources.
- **Counter compliance:** Can PQ please intercede on our behalf with O'Reilly to make them consider becoming COUNTER compliant?   Their statistics package is unhelpful in that is does not allow easy comparison year to year, doesn't use any standardised measures of use and therefore does not allow usage comparison with other products.

Wendy provided an update: links to title level have been stable for a few weeks now, but O' Reilly platform is still unable to support stable chapter level links. They work once only and then require user login, with subsequent redirect to O'Reilly home page. We are in discussion with their technical team about this.

Lynda-James-Gilboe provide an update of the work ProQuest have been doing with this supplier. Lots of meetings to resolve issues, and pressure from ProQuest to progress. Sophie had been working to progress training dates. O'Reilly have promised to become COUNTER compliant within the next year.

5   Leganto and Endnote (Plymouth)

- There is no scope to import records from Leganto reading lists into Endnote.

ProQuest reply: We think you mean EndNote to Leganto: and we think that RIS format should enable that.

Adam will update Plymouth.

6   Leganto/Primo (Bath)

- **Leganto links wording:** Be able to change the wording of links in Leganto (by default it just says 'view online' but if you have multiple links in one citation it can be confusing*) e.g, if you want to link to both a PDF and HTML version of an article*
- **EZProxy:** Have the EZ proxy automatically added to any links in a citation. At the moment only the first link (created automatically by Leganto) uses the proxy, but it can fail if the metadata are incorrect. The links added manually or via the cite it! Widget (under edit > source) don't get that treatment, so off campus users can't use these links.

ProQuest reply: The wording of the link is customizable so that institutions can use the label that resonates better with their users. Most links within Leganto to electronic resources will go through the link resolver which is controlled in Alma, so the EZ proxy prefix would need to be added in Alma instead.

There is a [Support Article](#) on how to do this but they can contact support if they have any questions.

- **Fix the cite it! Widget** so that it works with Edge too

ProQuest reply: This should be possible. Raise a support call – please provide screenshots.

- **New book editions:** Would like an automated way to check for newer editions of books which are listed on Leganto. *Use Proquest data for matching authors/titles? Introduce ISBN mapping to track different editions?*

ProQuest reply: Leganto already offers a way to track new editions owned by the library. PQ are already looking at ways of offering new editions not owned by library using an external service. Once a suitable service is found PQ will incorporate functionality.

- **EBSCO HOST taking priority over journals** in primo when clicking on 'full text available' for some articles *(is this our local settings or a general issue?):*

ProQuest reply: this is a separate installation in primo so they will need to raise a support call. The Ebsco results should come out separately. The priority of the links that go the FT are configurable by the library.

Can they confirm that their actual configuration doesn't match the behaviour they're observing within Primo? Sounds like a link resolver issue.

- Example: article from 'Journal of Chemical Education': Clicking on the full text available link from the results page takes you to EBSCO HOST where it shows you the article abstract and a library LINKS button to check for full text access.

ARTICLE
Graduate Student Designed and Delivered: An Upper-Level Online Course for Undergraduates in Green Chemistry and Sustainability.
Haley, Rebecca A. ; Ringo, Jessica M. ; Hopgood, Heather ; Denlinger, Kendra Leahy ; Das, Anushree ; Waddell, Daniel C. ;
American Chemical Society
Journal of Chemical Education, 2018, Vol.95 (4), p.560-570
Full text available

Detailed Record
links Check Library Links for availability.
Cited References (25)

Graduate Student Designed and Delivered: An Upper-Level Online Course for Undergraduates in Green Chemistry and Sustainability.

- Whereas clicking on the 'full text available at' link under the VIEW IT section takes you straight to the article within the journal…
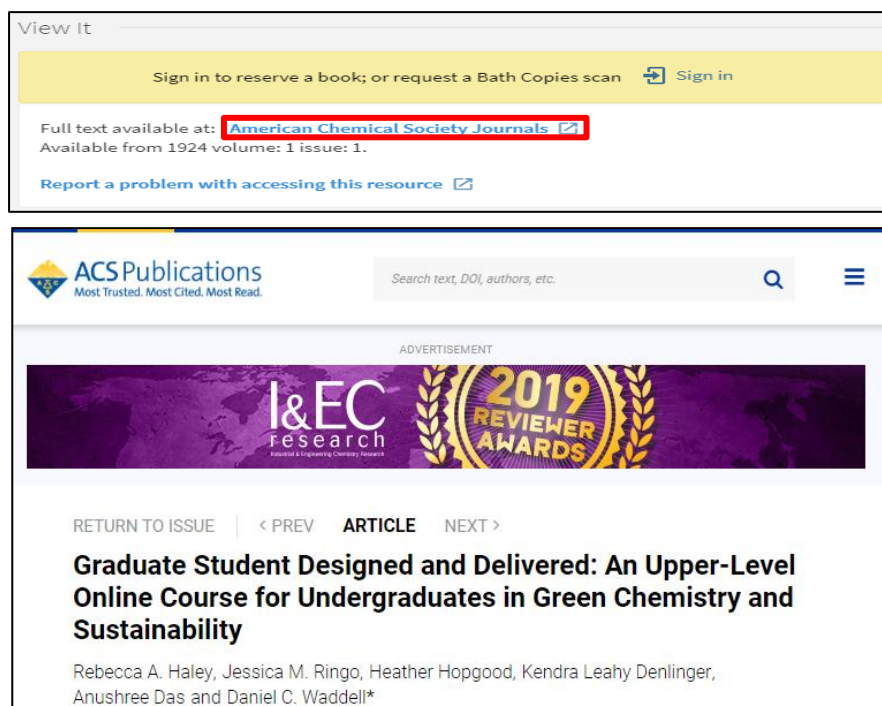
7 ProQuest Academic Complete ebook collection (Falmouth)

- Struggle to know the best way to keep our catalogue up to date with items coming in and out of the package.
- LibCentral tells me that we have access to **176,736** titles.
- In Alma, we have the Community Zone collection Ebook Central Academic Complete UKI Edition activated.   I am advised by our PQ ebook specialist that this is now updated daily by PQ/Ex Libris. This Collection has **176,362** titles in it.
- The Community Zone collection gives 99.8% coverage of the full package, but there are still nearly 400 titles missing from the collection.

- Is there an explanation as to why some titles are missing?
- How confident can we be that the CZ collection will keep up with changes?
- When automated holdings update for subscribed titles into Alma is made live (due March 2020?) will that have 100% coverage of the Academic Complete collection?
- Or will there still be gaps because PQ/Ex Libris just don't have usable records for some content? (this refers to the express marc records that ExLibris hold for some of their book titles, as oppose to full marc records).

ProQuest reply: ebooks team are working with Falmouth to fix this; there is an error with the SFX feed that they are investigating; SFX feed should be identical in both systems, but it is not currently.

The auto-holdings feature will be released in March 2020 for a small group of early adopters –the general roll-out will be May. This will be more accurate than what we have today as updates will be daily, not just weekly.

This update is eagerly anticipated by user community as it should improve index update speed and accuracy.

8   EBook Central eBooks (East Anglia)

- We have an on-going issue with single-user EBook Central eBooks. Originally flagged with them over a 2 years ago and have continued to ask about.
- If a single-user EBook Central ebook is in use, rather than giving other users the message that it is in use, it says that we don't own it. This is confusing for both users and library staff.
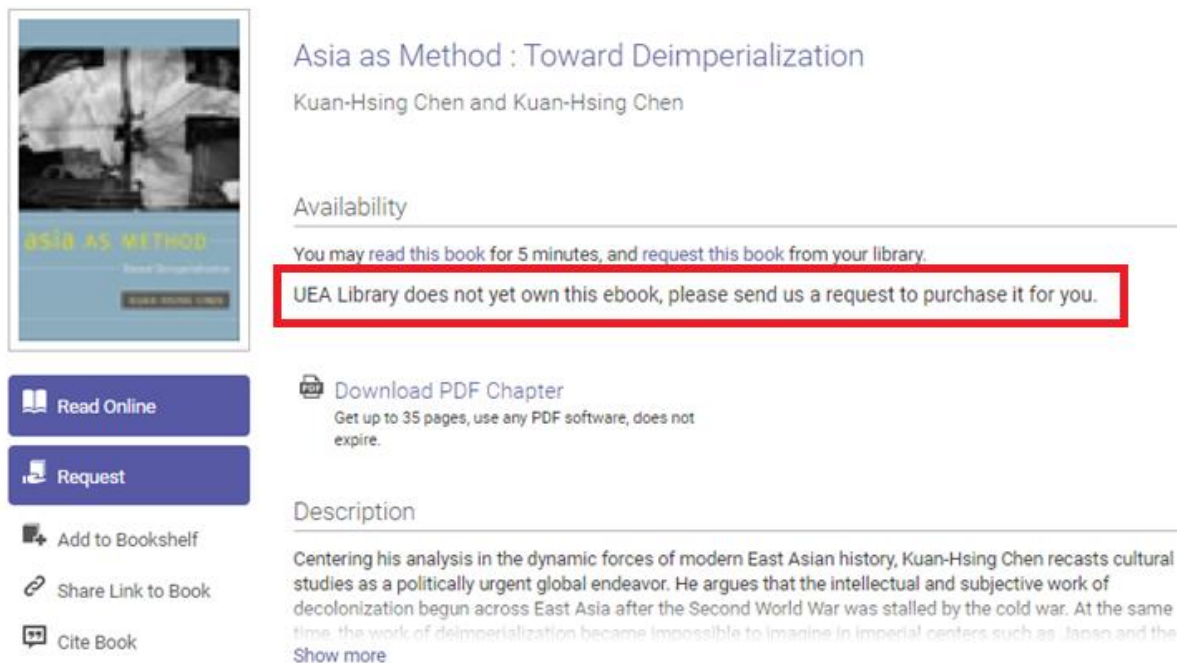
ProQuest reply: the message displayed here is a locally assigned one, if East Anglia cannot change the message, they need to raise a ticket with tech support for help with this.

Helen added a query around the separation of ProQuest resources (specifically Ebook Central including DDA titles) for different users. Salford had already been told previously that it is not possible to separate out only Subscribed titles. Have been any developments to fix this?

ProQuest reply: ProQuest will check again whether there is a work around to enable this.

9   Unpaywall and OpenAIRE (Hertfordshire)

- **Unpaywall** development that has just been introduced, and an understanding of the road map around introducing Open Access Resources would be useful. In particular, in terms of unpaywall:
  - **Types of OA:** Will it be possible to select the different types of OA that can be included (i.e., Green, Gold, Bronze) etc? (The new Unpaywall Journals service allows this level of granularity)
  - **Discovery rules:** What are the default discovery rules if any and what are your plans on developing this further such as allowing owners to decide the best option for their tenancy (e.g., Don't show Unpaywall link when a subscription copy is available etc.).
  - **Statistics:** What usage statistics are available for Unpaywall usage?
  - **Facets:** Further info/timescales around ensuring facets recognize the Unpaywall link, particularly Open Access / Full Text.

ProQuest reply: this is unpaywall on summon, not the PQ platform. Christina will contact the team there to discuss workarounds. post-meeting note; Cristina obtained an answer from the Summon team:

1. **Types of OA:** Currently for Unpaywall it's either on or off. We don't have a way to activate or deactivate items that are in Unpaywall. So if we have a match with Unpaywall and a result, we will display the link. However, results are displayed based on your rights. So if you wanted a specific Green OA sources and to not include a Bronze source, if that collection is available in Client Center/Intota/Alma, you could add the Green OA sources and not add the Bronze one, and the end result would be that the Green OA sources would appear in your default results; expanding to beyond my library's collection would expose the Bronze one not added to their instance of Summon.
2. **Discovery Rules:** Currently there are no rules beyond "if there's a match and the client has Unpaywall turned on, then display the link." There is no awareness of other sources. You can prioritize what links are provided, but at this time, Unpaywall is not in that prioritization. We will consider that for 2020.
3. **Statistics:** Currently none. Just launched in November. Will be adding to OBI in 2020 along with some other improvements. Our current iteration is a first pass.
4. **Facets:** as I mentioned in webinars, the facets don't recognize Unpaywall. The two facets that are impacted by this currently are the Open Access facet and "Beyond My Library's Collection." We currently add just the Unpaywall link to the result; there is no associated metadata, so no OA flag to say it's OA. If another record associated with that result is marked as OA, then it can react to the facet. So there may be some Unpaywall results/links that are excluded when you limit to only OA content. For Beyond My Library, Unpaywall doesn't have rights associated with it, so we cannot identify something as having a link to text that's Beyond your Library. In 2020, we will definitely address the OA facet issue and will see what we can do about Beyond My Library's Collection. Timing will likely be the May or August 2020 quarterly releases.

- **OpenAIRE** platform issues:
  - **Citations not linking to full text:** Some citations on OpenAIRE were found to link to tables of contents or book covers on a repository and not to the user's expected destination the chapter of a book. Due to the number of citation only records being presented as potential sources of full text records deselected OpenAire from being indexed on Summon.
  - **Journals only?** Perhaps having OpenAIRE available as a search source only for certain types of material (journal articles) where what's available is more likely to match what people are after. This granularity isn't available in Summon.
  - **Intermediary page** is rather "unfriendly" and can generate some confusion

ProQuest reply: OpenAIRE team have not been able to replicate problem. If Hertfordshire could send a couple of examples and then ProQuest can go back to OpenAIRE and ask them to fix the errors.

There is a 'journal article' filter on the list of results in Summon that can be used to limit the content that a user sees, but rather than disabling the rest of the content we would like to fix it working with OpenAIRE.

Intermediary page is owned by OpenAIRE. PQ will share preferred workflow with them: preference is to take the user to the FT document instead.

10 ExLibris Community Zone (Cardiff Metropolitan)

- **Poor quality metadata:** Lots of evidence here (and also within our consortia WHELF) of poor quality metadata, lack of timeliness in adding collection data and inaccurate title lists.
    - E.g. the KB+ Wiley title list for 2019 was only added to the Community Zone in October 2019, even though it was readily available to download from KB+ (Jisc) at the beginning of the year.
    - When it as uploaded there were missing titles from the list. This causes much frustration for anyone involved in trying to manage electronic resources in ALMA/PRIMO.
- **ProQuest reply**: There was an [Age of automation ProQuest update webinar](#) on Wednesday. This gave details on updates to the provider zone.
- Perennial problem of link quality dependent on quality of original metadata from publishers. Trusted publishers will take control of adding their own data, PQ cannot check everything programmatically, sometimes needs a human eye
- Often PQ get KBART lists that do not match publisher websites. Sometimes Kbart + does not match. As a rule, PQ try to use KB+ as a trusted source, but sometimes this not perfect.
- KB+ cooperation has improved in recent months, now have a regular contact, since they've had somebody to work with at KB+ we've been able to develop an API to update content. Much less of a time lag between file from publishers and getting into the index. Weekly process. So the time lag will be only 3 days max.

- **Problems with the ingestion and quality control in Ex-Libris:** Many Salesforces cases have been raised and WHELF have been involved in mediation between Jisc (KB+) and Ex-Libris for many years, there are still problems with the ingestion and quality control in Ex-Libris.
    - We don't appear to be any further along, checking content is accessible for users is just becoming unmanageable as, even when you have spent months and months trying to resolve issues they can revert back.
    - Onus always appears to be on the users to pick up on and chase until resolved.

ProQuest reply: In addition to the API mentioned before we have many mechanisms to prevent the ingestion of poor quality and the creation of broken links. We have QA testing (manual and automated) that samples the content to check accuracy, quality, linking, etc.

•Given the volume of the content that is handled by our products and the standards for Quality Assurance (QA) we perform sample testing which assists in preventing many issues.

•Further, our Content Support teams are running a special effort (announced to the UKI community) to address the UKI support cases, including older cases.

- **Time wasting:** We are aware that Ex Libris have agreed to a 2nd UK Community Zone meeting.
    - Libraries should not have to be double checking data over and over and over again.
    - Huge duplication of effort, and waste of resources at a time when there is little to no spare capacity at all in the HE sector.

11 Proquest search interface (York)

- **ASSIA:** Researchers having to carry out two separate searches as the interface just can't cope with the kind of searches required. Have to download two separate sets of records that are deduplicated in Endnote.
  - All the other searches using any of the other databases/interfaces have been carried out as one search.
  - Reported this numerous times but nothing changes. "If I could avoid Proquest I would".
- **Cochrane Reviews:** Comments:

> Notes: The ProQuest interface could not successfully combine the search lines without crashing the search. Lines S29-S34 were individually downloaded and de-duplicated in Endnote.
>
> Notes: The ProQuest interface could not successfully combine the search lines without crashing the search. Lines S36-S42 were individually downloaded and de-duplicated in Endnote.

- Copies of the search strategies used were sent to Proquest and have been added to their test bank of complex searches.

ProQuest reply: Researchers at ProQuest have spent the last 18 months looking at this. Looking at advanced researcher workflows. Built a body of these very large queries that the team use as examples to test the system. Adam will pass on the details of the York query contact to Christina who can put them in touch with the search team. ProQuest will also provide advice on how to modify the queries to help them work more efficiently whilst providing the same results.

Thanks to York for these real-world difficult queries to provide example searches.

12 Any other user issues

13 Matters arising from the minutes of the previous meeting held 24th June 2019

Attendees
- **Sherif member libraries**
  - Adam Edwards – Middlesex University London (Chair)
  - Gavin Brindley – Coventry University
  - Nicola Walton – Manchester Metropolitan University
  - Sarah Lowe - University of Brighton
  - Wendy Mears – Open University (Secretary)
  - Amanda Quimby - University of Birmingham
  - Michelle Perrott – University of Northampton
  - Masniza Sore – University of Northampton

- **Proquest/ExLibris**
  - Lynda James Gilboe
  - Sophie Panagi
  - Cristina Blanca Sancho
  - Scott McCarthy
  - Robert Bley

Apologies
- o Rachel Scott – University of Reading
- o James Allen – Falmouth Exeter Plus

Gale results in Summon (Manchester Metropolitan University)
- o Can we get more granular results where Gale have tagged an item as 'citation only'? So that this is reflected in Summon? For example:
    - Article: The Varieties of Religious Experience
    - Journal: The Hollins critic
    - ISSN: 0018-3644
    - Date: 06.2015
    - Volume: 52   Issue: 3   Page: 21
- o Gale say: "Our team has advised since this article is a Poem, it cannot be converted to digital per our agreement with the publisher. On our site we list this is listed correctly as 'Citation Only'."
- o We've tracked the journal as full text.   Why can't Summon reflect this listing?

Explanation: Records came through from Gale as full text. If there is no tag in a key field of the record they default to full text.

ACTION: Nicola needs to provide Gale with more details to resolve

Result of further investigation: Discovered that there are 2 potential targets from Gale for this content – one we do have access to (Architectural review) and one we don't (Hollins critic). There was only one link appearing in Summon – the architectural review….but this was linking to Hollins – hence the confusion all round. Both targets now appear and work as they should.

Legacy RefWorks (UWE Bristol)

Middlesex want to switch off old RefWorks: Is there a setting to prevent new account creation?

ACTION: Contact User support for explanation [Done].

Any other user issues
10 b. Gavin Brindley (Coventry) their Information Resources Services would like to get a push notice from the PQ invoice portal when there is an invoice awaiting payment. The best solution would be to build it into the Alma workflow.

ACTION: Lynda Jane Gilboe will get back to Sandy Forster at Coventry and share the feedback with the technical team. THIS HAS NOW BEEN IMPLEMENTED

Matters arising from the minutes of the previous meeting held 3ʳᵈ December 2018

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.

Dec 2019 update: Still an issue : Northampton IT team to raise a ticket to resolve. This must be something in local setup.

ExLibris Alma and Primo (Middlesex University)
- 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?
- **ACTION ProQuest will check and update. CTR will be available soon**

UPDATE 24.6.19: CTR in Primo is not consistent as it is generated from Open Source and CTR have stepped back from taking ownership of the CSL files. Could Primo use the RefWorks source files instead of CSL files as these are more consistent with the CTR standard?

Dec 2019 update: We need more information for troubleshooting:

• In which system were the orders placed when you first started?

• Was it from EBC or from Alma?

• Has it changed since you noticed the change?

• Are you using Alma's auto-holdings (currently updated on a weekly basis) or a

script within Alma?

14 ProQuest and ExLibris updates – see slides circulated with minutes

15 AOB

16 Date of next meeting: June 2020 venue tbc

14