

ProQuest meeting – 24th July 2012

Attended: Catherine Robertson (Co-Chair), James Caudwell (Co-Chair), Amanda Lawrance (University of Birmingham), Sarah Lowe (University of Sussex), Andrina Howlett (University of Nottingham), Wendy Mears (Open University), Timothy Babbitt (ProQuest), Richard C. Belanger (ProQuest), Cristina Blanca-Sancho (ProQuest)

Apologies: Helen Beardsley (University of Stirling), Christopher Moll (University of Hull), R. D. Kahn (University of Sheffield Hallam), Meiko Yamaguchi (Bangor University)

1) Terms of reference and organisation of the group

The group agreed with JIBS terms of reference and the suggested organisation of the group – the members attending plus those who sent their apologies, plus other interested representatives as express interest.

2) Latest developments

ProQuest plan to work on integrating all their platforms into one. The Chadwyck-Healey databases will be moved in the near future. The plan is to make subjects within the main platform cross-searchable for ease of use.

Library cross-search functionality with other ProQuest databases is also being investigated and was popular with the group.

3) Resources update

- Sight and Sound was recently re-digitised so it is now in colour
- Paley Seminars – contains filmed seminars and discussions, and the video is searchable via keyword (the video itself is indexed and linked to keywords).
- Early European Books (EEB) – part three has been released and the plan is that it will be bigger than Early English Books Online (EEBO), and EEBO will eventually become a subset of the EEB database. EEB is full colour and scanned at source rather than from facsimiles. Everything is captured including the book spines, page ends, etc.
- Queen Victoria's Journals – a new resource released for Queen Victoria's birthday. Contains colour illustrations by Queen Victoria, and has a timeline function so can see what else was happening in history on the day a journal entry was written.

4) JIBS feedback to ProQuest : Q&A

a) Refworks - the group fed back concerns to ProQuest:

- *Logon difficulties* - ProQuest is releasing a fix this month (September) to address remaining export issues under EZProxy from the ProQuest platform to RefWorks. In addition, ProQuest have implemented the WNC login code, and continue to investigate the best way to

authenticate with Shibboleth and Athens as they were not designed to work with desktop applications like WNC.

- *Shared PC environments* - It is necessary to copy a long WNC login code for some users on networked University PCs as well as for any Shibboleth or Athens accounts. There are also data security issues with working on public PCs when users do not clear their session. It was acknowledged there is no easy solution to these issues, but the ProQuest technical team can be consulted for solutions to specific issues that may be encountered in a shared PC environment.

On data security, ProQuest are working on a feature that would clear a locally installed database that is on a public machine. However, they would like to stress that WNC 4 like WNC III is a read only instance, all a user can really do is view the data or log out and log into their accounts, overriding the locally installed data and not make any changes.

- *Limitation of 2,000 reference database* - While the 2,000 citation limit in the Write-N-Cite product only impacts a small subset of the overall Refworks user-base ProQuest have taken steps towards the removal of this limit. The newest release of WNC substantially changes the backend of the Write-N-Cite product and will allow ProQuest to remove the limit in the near future.
- *Length of time to sync database with Word.* - Write-N-Cite 4 changes how database syncing is done such that, after the initial launch of Write-N-Cite, the user manually syncs their database. This greatly decreases the impact automatic syncing could have on the responsiveness of MS Word. Additionally, ProQuest are working to further optimize the syncing process so that the synch process runs smoother and more efficiently.

b) Interoperability with Resource Discovery Systems:

- *Inclusion of ProQuest resources in Resource Discovery Systems.* ProQuest are currently in talks with RDS providers, and understand the concerns of institutions owning an RDS or planning on implementing one that ProQuest resources are not indexed. This has an impact on usage of the ProQuest subscriptions in the RDS context.
- *Issues from the publisher's side relevant for the community to appreciate the ongoing conversation between ProQuest and RDS providers.* (a) Each RDS requires different fields to be indexed and so ProQuest needs to optimise all records in all databases differently for each RDS. (b) It is not yet understood how COUNTER reports can include ProQuest content accessed via an institution's RDS and this is key to measuring impact for each party (c) Relevancy ranking in each RDS operates differently and in some is known to affect ProQuest resources negatively. A solution is

needed for the interface to display A&I results, for example, more positively in relevancy ranking so that the value of A&I is not lost in result sets. This may be a wider question of industry standards in these emerging discovery layers.

- ProQuest noted that it was a matter of when, not if, their records would be made available in third party RDS's, and talks are ongoing.
- JIBS will ask its members to press the RDS providers to allow ProQuest to put their records in their indexes.
- It was noted that both the British Library and the University of Oxford have now turned off their original catalogues in favour of all users accessing material via their RDS's.

c) ProQuest New Platform : Searching and functionality

- *Number of search boxes available on Advanced search.* The advanced search screen has several options for boxes to fill out. This was chosen as a compromise between what was offered on the ProQuest databases, and what was on the CSA Illumina platform. Based on the feedback ProQuest have received from customers, they have determined that there are significant communities that prefer either the "single box" approach for Advanced Search, like the one currently used for Corporate users, or the multiple box approach currently used by Academic users. The approach ProQuest will be taking to address this will be to allow users to customize their experience by choosing the search form layout they prefer. They are investigating the inclusion of this solution in their 2013 development pipeline.
- *Searching a set of databases then switching to search another set and not wishing to re-key the search term in.* ProQuest reports that this functionality was considered and tested, but users were confused as more often than not they wanted to do a completely new search within the new set of databases. It was suggested that people switch to the new set of databases and then use the recent searches option to pull the search in. There is also a feature which, when a user changes database selection, provides a prompt saying 'Do you want to run this search in a different database'.
- *Lack of facility to specify UK data.* There may have been a misunderstanding about UK data in terms of a location v. data in terms of country of publication. The latter can be searched in the Advanced search on the new platform which it could not in the CSA Illumina platform.
- *Pages getting "stuck" when researchers perform big literature searches.* JIBS will seek use cases of this issue from members reporting it to take to the second meeting. ProQuest will be able to identify searches failing with date/time/account/IP/browser data if supplied.
- *Not easy to highlight all results (have to go through each page selecting records on that page then moving to the next)*

- *Shibboleth issues and platform migration.* ProQuest/JIBS agreed that the issues were probably related to the changes to the platform on which the Education databases (BEI, AEI, ERIC) were made available. These issues were resolved earlier in the year.
- *Highlighted search terms.* More detail is needed from JIBS on the issues here. Different screens display terms differently – in terms of fullness. The “Preview” screen for example displays A&I terms. The results screens as currently configured display terms and format options for downloading from ProQuest’s end user market research. ProQuest would like to investigate this further, and would welcome the opportunity to review any examples that can be provided.
- *ASFA thesaurus.* The September 2012 enhancement due in the new platform release in Q1 of 2013 will address the searching of the ASFA thesaurus issue.
- *Lemmatisation.* Lemmatisation can now be switched off if required.
- *Proximity searching not working correctly.* JIBS will seek use cases of this issue from members reporting it to take to the second meeting. ProQuest has no reports of this being an issue separately from the JIBS query and suggests the search operators (no. of words near and words in a particular order) available in the Advanced search may not be known by the users reporting the problem. ProQuest would like to investigate this further, and would welcome the opportunity to review any examples that can be provided.
- *Accessibility issues.* WM reported on the work done at the Open University towards maximising the usability of resources for disabled students. ProQuest would be interested to hear feedback directly from the OU. JC noted this feedback could be of interest for the wider JIBS community. ProQuest would like to investigate this further, and would welcome the opportunity to review any examples that can be provided.
- *Connectors for ProQuest resources in MetaLib.* CB-S will check that Ex Libris has the correct fields checked so that the requirements of institutions for full text / A&I searching are met ProQuest has reached out to Ex Libris about this, and they have requested that customers submit a support call with Ex Libris’ customer reports system, specifying database searched, an example search query and the resulting records retrieved based on the presence of the search terms in the full text. This should allow for a more rapid analysis of this issue.
- *Accessibility for users of mobile devices.* SL described the frustration of users with Shibboleth login on mobile devices. This led into discussion of personalization services that could be optimized with Shibboleth data by ProQuest (5(a) below).

5) Discussion

- a. Shibboleth can be set up so that users are automatically logged into MyResearch. Institutions are invited to contact ProQuest if they would like this functionality set

up. This in turn led to discussion about whether institutions would like to allow ProQuest to use Shibboleth more meaningfully and gather data about how they are using the resources. This data would be of interest to institutions as they would be able to see how users are using the material they are subscribing to, and it would be useful to ProQuest to see what material is being used so they can better plan future collections etc. ProQuest can put an optional cookie on their databases so users have to opt in. Institutions who are interested are invited to contact ProQuest for more details.

- b. 90% of searches on a ProQuest platform are cross-searches, and half of those are from a single database drop-in point (eg trend appears to be that people start in a single database and then switch to cross-search)
- c. There used to be databases that were highly used because people knew them (brand awareness) but seem to go down once an RDS is implemented. By contrast databases with difficult user interfaces have much improved usage once user access them via an RDS as suddenly users are able to access what they need without understanding the interface.
- d. JIBS/ProQuest agreed there is potential for much to be learned of mutual benefit about understanding user behaviour and adaptation to online developments for discovery via the newly-formed group

6) Actions:

- a. CR and JC to circulate minutes to JIBS Enhancement Group for approval, and to update JIBS blog once minutes are approved.
- b. CR and JC to arrange date and location of next meeting, and approach other institutions to increase the membership of the group
- c. CR and JC to compile list of questions for ProQuest in advance of next meeting, with examples.
- d. Any institutions interested in allowing ProQuest to set up optional cookies to contact ProQuest individually.
- e. Post-meeting (following discussion at Cambridge). JC to request ProQuest to supply a paragraph describing in broad terms the technical requirements for releasing Shibboleth data to ProQuest for experimentation with the issues involved under 5(a) above.
- f. Post-meeting note. In seeking attendance of JIBS members for the first meeting feedback was received from subject liaison librarians at King's College London. Discussion of this was not included in the first meeting so will be taken forward to the second meeting.