JIBS/ProQuest User Enhancement Group Minutes

June 9, 2016

1) Attended and Apologies

Attended – Catherine Robertson (University of Birmingham), Amanda Quimby (University of Birmingham), Adam Edwards (University of Middlesex), Steve Gray (Open University), Cristina Blanco-Sancho (ProQuest), Scott McCarthy (ProQuest), Zoe Loveland (ProQuest), , Linda James-Gilboe (ProQuest), Sophie Panagi (ProQuest)

Apologies - Sarah Lowe (University of Brighton), James Allen (University of Salford)

2) Approval and queries of minutes from last meeting

- JUSP – outstanding issues with collection of ProQuest statistics have been solved, but two new issues have been found. ProQuest are working on fixing it and institutions will be contacted by JUSP. Once the institution responds then they can go live and access ProQuest reporting via JUSP [update: Sushi login credentials were created and sent to JUSP in July to allow the harvesting of journal sushi usage statistics. ProQuest will need to make some minor changes to the format of the report sent but in the interim, JUSP will apply a workaround to allow download and use of the usage statistics. We are waiting for JUSP to confirm that this has been made available to institutions. ProQuest has received requests from a number of JUSP institutions about the availability of Ebooks Sushi usage statistics on the JUSP portal. This has been added to the roadmap for 2017. ProQuest will confirm next year when this will be available.]

- PDA Adobe Digital Editions – Members had been asked to feed back about how they use it. UoB and MDX reported that they do not have it on their public PCs as users are expected to download to memory stick or to read online rather than download to a shared PC which will be wiped clean overnight. MDX also fed back that download time would be more useful if longer than 15 days (eg they have students on a Shipping and Logistics MBA whereby the student is travelling for long periods and will not have internet access to download that often). Feedback was also that public PCs at Universities are very heavily used by students generally [ACTION – AE to post on wider JIBS list for information about how public PCs are used at institutions]

- Platform analytics – UoB would like figures for turnaways for embargoed material. Currently this isn't possible. [ACTION SM to investigate and report back]

- ProQuest Dissertations and theses (logo placement) – logo is appearing in the right place but some institutions may need to update the link to their image if not displaying correctly.

- Google Scholar ranking – works better with unique material, eg PAO material. Institutions to forward any individual queries to ProQuest directly.

3)   Change from Legacy RefWorks to New RefWorks

- MDX purchased RefWorks Flow which has now been discontinued. Now there is Legacy RefWorks and New RefWorks. Feedback the group suggested several things – the move between products was too early as it was felt that New RefWorks is not a fully complete product yet; the name change wasn't useful as it isn't meaningful; name change to Write-N-Cite not useful especially for people preparing training materials for teaching; the timing isn't useful when universities often only add new software to all PC's once a year. It was also felt that the whole switch felt muddled and was not conveyed usefully to customers. ProQuest explained how their release and testing works – a product is released quickly and then has lots of ongoing modifications responding to user feedback. This allows the flexibility to adapt a product during its lifetime but may have contributed to customers' frustrations in this instance. ProQuest to consider future communications to ensure the process is clear to the customer [ACTION – ProQuest to feedback comments to the RefWorks team, LJG to share feedback with ProQuest senior leadership]. This has been done – 2.9.2016

- The latest version of Write-N-Cite needs to be on all PCs. It is now an add-on in Microsoft Word and so is installed from within Word. The Add-in is secure and cannot access any other parts of the PC. It works with both legacy and New RefWorks [ACTION – members to check they have version 4.4 as this will reduce problems].

- ProQuest asked whether their comms were generally useful, and the feedback was yes they were but a face to face discussion is often best, especially for technical and software issues, as much easier to explain and question in person. The feedback was that the recent webinar was useful [ACTION – members to watch the webinar if needed and feedback any queries to ProQuest]

- The group agreed that any comms from ProQuest about systems should be clear and simple, and have clear dates stating exactly what will happen on what date [ProQuest to feed this back to RefWorks team]

- The Open University reported that they had recently cancelled their subscription to RefWorks. Factors involved were: a) cost and b) time spent helping users with queries. OU have an ongoing query from an alumnus who has now lost access, currently speaking to the RefWorks helpdesk ProQuest advised this should be possible [OU to contact ProQuest directly if helpdesk can't resolve]. MSX reported that their users

prefer free, web-based referencing software as no risk of losing access if they change jobs.

- Chadwyck-Healey databases retiring – House of Commons Parliamentary Papers has migrated but other databases are staying live, and dual running is available for the switch over. Policy File, Colonial State Papers and the Cecil Papers will migrate later in the year.

- A&I databases – ProQuest have changed how these are sold. The main change is to the Science and Technology products which are being bundled to create small full text collections that map onto an A&I service, same with Social Science products. Not much change to Arts products. MDX fed back that they no longer buy A&I products, they buy full text only.

4) **Usability of EBL** – Feedback from UoB that wasn't very usable. ProQuest advise that when EBL and Ebrary are fully merged that this will no longer be a problem as the combined product will be using the Ebrary reader for display.

5) **KorText and VitalSource** – MDX use KorText and provide every student with a free eBook (eg paid for by MDX) per quarter of their choice, and the order is fulfilled by John Smith's bookshop. The students can access their free eBooks in perpetuity via the platform but can also access the library's other eBooks via the same platform. The budget for the 'free' eBooks is £2 million, paid for as part of a wider University initiative. For further information, the project lead is Paul Howells at MDX [ACTION – ProQuest to investigate if their eBooks can be incorporated into Kortext] – This has been done 2.9.2016

6) **Overview of ProQuest/Ex Libris merger in relation to the JIBS User Enhancement Group** – ProQuest confirmed that existing Ex Libris user groups would continue unaffected, and they will also invite an Ex Libris colleague to attend this group and answer any queries that touch on Ex Libris. (LJG note: Ex Libris is happy to participate.) The group asked whether Summon or Primo would be discontinued – ProQuest confirmed that there were no plans to discontinue either product. UoB gave feedback that lots of Ex Libris seems to be geared towards Alma, but a lot of customers still have Aleph and SFX. UoB also fed back that they did a PDA trial with EBL, which was very dynamic with additions and deletions made weekly, but these changes were not made at the same speed within SFX or Primo Central Index, leading to greater administration for librarians and ultimately user complaints about dead links.

7) **Membership** – the JIBS side of the User Group needs more members. [ACTION – all to recruit: ProQuest will mention this opportunity when meeting UK customers; AE will request that a call be put on the main JIBS mailing list; AQ to send out on eResources mailing lists, etc.] – update 2.9.2016 - Zoe has contacted the ProQuest sales and customer experience teams

8) **Metadata for ProQuest Academic Complete ebooks –** The Open University Library recently purchased the ProQuest Academic Complete collection, and requested access to be enabled through the ProQuest Ebook Central platform. The OU Library uses the Ex Libris Primo discovery service, and there is currently no metadata for ebooks in the Academic Complete collection stored in the Ex Libris Alma database. Alma only contains metadata for ebooks on the ProQuest Ebrary platform. Activating Ebrary targets within Primo will make these titles discoverable to members of the OU, but the absence of marc records in Alma for Academic Complete ebooks results in titles appearing without a 'Full Text Available' acknowledgement and link. The OU Library would like the relevant records made available to Ex Libris and added to Alma. The OU Library is currently unable to launch Academic Complete to its staff and students until this is done. ProQuest stated that Ex Libris are treating this as a high priority, and the work is nearing completion. [ACTION – ProQuest to contact the OU Library to confirm when work is complete.] – Update 2.9.2016 - Cristina is following up on this

9) **Update from ProQuest**:

   a. **Ebook Central** – EBL and Ebrary are merging. The Ebrary reader will be retained, but with a better search interface. It will be very clear to users what they can do with the content (eg exactly how many pages they can print and download, etc.). If user wants to download a chapter it is via PDF, if want to download more, a user needs Adobe Digital Editions or Bluefire. Users can highlight, make notes, maintain their bookshelf, etc. It detects which device the user is on (mobile, Mac, PC, etc.) and will resize the screen. 780+k titles have been merged. A new purchase model will be used and a new contract will be issued for Ebooks Central, and the systems are likely to be dual running while the new product is launched. Flexible acquisition models – choice of either PDA, subscription, or perpetual access. Participating publishers include OUP, CUP, Taylor and Francis, Wiley, etc. Approximately 5% of customer accounts have moved to Ebooks Central. [ACTION – institutions to let ProQuest know which method we will be using for authentication. Return form given out in meeting to ProQuest asap]

   b. **RefWorks update** – Word add -in instead of Write-N-Cite download (ProQuest confirmed the latest version of Write-N-Cite lets you choose whether you want to go to New or legacy version of RefWorks); keeping Z39.50; advanced search coming in June; improved deduplication; a 'last imported' folder; retrieve deleted items; highlighting where there are data gaps in a citation etc. Following a query from UoB, it was confirmed that there is a slider in admin account to disable document sharing facility as well as synching of accounts with Dropbox. [ACTION – UoB to contact ProQuest about fields not mapping when they import from their catalogue]. In Q4 users will be able to have multiple accounts linked to the same email account. When transitioning to New RefWorks, institutions can choose one of the following: 1) Call ProQuest support and ask for New RefWorks to be made available for dual running, 2) Call ProQuest support and ask to turn on 'soft migration' (still some access to legacy although all accounts moved to New), 3)

Call ProQuest support and ask for 'hard migration' (immediate switch, what will happen to any institutions who haven't moved platforms by the end of Q4). Users will migrate their own account – a button will appear for them to activate it. Release dates given are: 17th June, 23rd Sept, 16th Dec. MDX requested a high quality version of the RefWorks logo for promotional material [ACTION – ProQuest to send this to the group] – Update 2.9.2016 - Sophie to follow up on this

c. **New product update**:

i. User interface to the platform has been cleaned up and greatly improved based on user feedback. Resizing of screen with mobile access detection also greatly improved.

ii. Current news videos – now includes content from the NY Times, etc.

iii. Disputed works message – the message that appears when the object isn't displaying due to a copyright query (for example) has been made much clearer.

iv. Administrator module password – now much easier to change

v. Recommendations – more analysis of metadata and indexing to improve the recommendations results that are given within products.

vi. Chadwyck-Healey film migration – these are all migrated now

vii. Better non-English language support – better support in the display of alternate author, title and abstract fields.

viii. Text to speech feature – option set via ProQuest Administrator Module, and will then show in all HTML text pages. It will read it and highlight the text as it is reading. Can also download for later listening. Popular with non-native English speakers to help with pronunciation.

ix. Altmetric support – a 'donut' now appears on documents that a) contain a DOI, b) are published in 2011 onwards, and c) have an altmetric score of 1+. If the article meets these criteria then the donut appears which contains altmetric information

x. Wheel of subscriptions – useful model, and ProQuest are happy to share with JIBS members. Please contact your sales rep for a copy. The basis is an app which the sales reps have access to, to customize offerings to our purchasing and subscriptions. Feedback was that institutions hoped the app would be made available to institutions directly as would be really useful for online collection management.

xi. Recent products – Country Life Archive; Philosophy database IV; Harper's Bizarre Archive; INSPEC

xii. What is coming? - ProQuest are disabling MyResearch authentication as there was very low usage of accessing in that way plus a few people were posting their username and passwords on twitter etc. it will be discontinued from 15th June and institutions using this option for authentication have been notified. All other aspects of MyResearch remain the same.

xiii. New releases

1. House of Commons Parliamentary Papers and House of Lords will now be on the Government Platform and will be called UK Parliamentary Papers.

2. India Claims Insight Phase 2

3. Early English Books 9

4. History vault – new parts

5. Women at Work

6. FBI and Auto communism

7. Shoah Visual History Archive – began as Spielberg/ Schlindler's List' oral history archive, and then expanded to include testimony from people involved in other genocide events. Videos of interviews, plus transcripts – it has been collected over several years and contains material in several languages.

d. **Date of next meeting** – Late Nov/early Dec 2016 was proposed. Please can any institutions who are willing to host get in touch with Catherine Robertson or Amanda Quimby.