

sherif Proquest Enhancement Group

24th June 2019.

University of Northampton

Minutes

1 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

2 Apologies

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

3 O'Reilly (former Safari) platform problems (Open University)

- This was a major issue at the previous meeting, see minutes below.
- The OU are still having problems with seamless access to O'Reilly books. Students are able to find them in Library Search (Primo), but have to be guided to access the right link from the results screen to make sure they can open the title on the platform. This is a barrier to content.
- The Liblink system is used to embed direct links from course materials to library subscriptions: We have not yet been able to trial any of the various fixes that are being discussed on forums so most of our traffic is still going to the old platform.
- There is a strategic question about the role of ProQuest as broker in the purchase communications, and the OU wonders whether ProQuest could do better in terms of mediation with this poorly performing third party.
- Southampton, who also raised issues with O'Reilly have cancelled their subscription.

ACTION: Linda Jane Gilboe to contact OU to organise and facilitate a meeting between O'Reilly, OU and PQ staff, to resolve continuing problems, and discuss wider issues relating to product development.

4 Gale results in Summon (Manchester Metropolitan University)

- 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
- 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'."
- 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

5 Ereaders for ProQuest Ebooks: What are compatible? (Birmingham University)

- A lecturer has the ereader Sony Digital Paper DPT-RP1 on her MAC, however she is unable to use it to download PDFs from ProQuest ebooks. She finds this reader excellent for annotating and highlighting.
- Is this supported and if so how can she get it to work, or if not, could it be supported?

Answer: Not supported as this ereader does not support DRM. Readers might be able to download a chapter on a different device and then upload onto their reader.

NOTE: There has been a 500% increase in PDF use since PQ removed DRM on its content.

- Wider question is then what ereaders are supported and how can we make this visible to customers?

Answer: Adobe Digital Editions, BlueFire and Online Reader, as all these support DRM.

6 Flagging Proquest Ebooks as accessible texts (Middlesex University)

- Middlesex University are reviewing processes for accessible texts for print disabled students.
- Proquest and Askews Holts ebooks are accessible in most cases.
- Could there be a flag/button for ebooks from these vendors to say "**Accessible Text**" in Primo and Summon (not least to differentiate from Dawsonera books which are not)?
- Ideally the flag would be a button linking to the accessibility statement for the vendor e.g. <https://support.proquest.com/articleDetail?id=kA140000000PDsICAW>
- We are also discussing this with Talis so as to have the same flag in reading lists, to speed up checking and spot texts we need to work on.

Answer: Comments sent to product managers as all Ebook Central titles are accessible. Gavin Brindley (Coventry) suggested an authentication note might be added at collection level. Member libraries wanting to flag this up should contact support for advice.

7 ProQuest ebooks counter 5 compliance (University of Reading)

- When is Ebook Central to become Counter Release 5 compliant? Is there a date they are working towards?

Due October 2019. Alma's Sushi will be counter 5 compliant some time during Q4.

8 Legacy RefWorks (UWE Bristol)

- Currently supporting Legacy and ProQuest RefWorks. Issues are with Legacy as follows:
- We have Open Athens authentication for Legacy RefWorks but users on New RefWorks have username/passwords. If RefWorks is not open when exporting references they are asked to create new accounts but are unable to do so; this has resulted in infinite loops and on occasion duplicate accounts
- Where users have managed to create an unwanted account, we are unable to delete them from ProQuest RefWorks admin area. Admin functionality is very limited and we are unable to do anything except make people admin.
- Browser compatibility is a regular complaint, most recently with Edge (I don't think this is mentioned in guides)
- Responses from helpdesk are often quite technical and assume knowledge the user may not have- this leads to unnecessary confusion and extended response times.
- Help desk response always assume ProQuest RefWorks so users are given guidance that doesn't make sense on Legacy
- We have had a couple of instances of issues seemingly impacting individual users e.g. unable to export references and where there is no obvious solution e.g. clearing cookies, there has in some cases been no follow up.

RefWorks User group: The RefWorks product has become more stable, so there will be one meeting a year going forward. On new RefWorks, users can either have an individual username and password creation or an institutional login. They are aware of issues deleting old accounts in new RefWorks. New account deletion coming soon.

Middlesex want to switch off old RefWorks: Is there a setting to prevent new account creation? ACTION: Contact User support for explanation.

Adam Edwards suggested various UX ideas to deter users from choosing old RefWorks, e.g. make old RefWorks less bright colour, and shrink the login logo, put new RefWorks login logo on left of screen.

Praise for new RefWorks features including table view, separate logins, citation view.

9 Proquest cookies and timeout messages (University of Northampton)

- The cookies message on ProQuest requires you to click twice, once to accept cookies and again to close. We would like to ask for this to be changed if possible.
- The recurrent timeout message on ProQuest has returned. We raised it with support but are still getting this intermittently.

This is just an irritation, but it would be nice to just click once to accept Cookies. Noted that OU are still getting this too. PQ used an external company to provide their GDPR compliance but acknowledged they (external company) may have been overzealous in their requirements.

The timeouts issue has been reported. There is a confusion arising over timeouts when the user has more than one browser session open. System clocks continue to count time down in the background even when the user's device has suspended access to closed browser tabs.

10 Any other user issues

10 a. Gavin Brindley (Coventry) noted a problem with the way that Advanced search prefilters access to databases. All Coventry's dissertation and theses are open access, but all their links go to the Advanced Search screen in Primo.

Dissertations and theses are not discoverable there because they have no subscription to the product.

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.

NOTE – Not all libraries would want to completely automate this process (Birmingham) and would still require some human checking within the payment of invoices workflow, so any change made would need to accommodate different processes.

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

11.1 Summon – duplicate entries, sidebar (University of Reading)

UPDATE 24.6.19: Case closed. No further recurrence reported.

11.2 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].

11.3 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].

11.4 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.

11.5 Oasis (University of Reading)

- We appear to have lost the functionality to “see inside” e-books on Oasis.

UPDATE 24.6.19 : No further reports; issue closed.

11.6 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 17.5k 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!

Action: 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. [Done – see notes above]

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

11.7.1 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?

ACTION: Sophie Panagi will investigate and update.

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

UPDATE 24.6.19 (RB) one or two actions remain, they are being resolved.

12 Proquest and ExLibris updates

Refworks

- Account sharing is made possible using what is essentially a second RefWorks account)
- CSL: 100s of styles had been added including UK specific Harvard style. CTR Harvard is available and works!
- Improvements with proxies and linking out to other products.
- June 2019: Ability to sort folders.
- Q3: Version 2 of RefWorks Citation Manager with lots of additional functionality, including ability to edit citation within the citation manager, many fixes to original design features.
- Discussed issue of Microsoft Store (only current source of Citation Manager) being blocked by many UK HE departments.
- Deduplication improvements. Citation and other views moved to top of screen to aid findability. Choose import folder rather than default target of last imported.
- All RefWorks slides are available in the JISC mailing list.

ResearchResearch.com

- PQ have acquired this and are aiming to develop the alerting service, linking up with US research updates and integrating with ESPLORO, PQ's CRIS product.
- Research Research will still be available as a separate subscription.
- Surrey will be first UK HE site to use ESPLORO.
- PQ have been working on developing their support for consortia, primarily for their US market although one or two UK consortia interested, e.g. WHELF.
- Noted that international partnerships are increasing, and that Jisc have been trying to simplify licensing recently.

Central Discovery Index

- Updates outlined in this webinar: https://www.youtube.com/watch?v=m6-LvGO_7M.
- Plan is to merge CDI and Alma and provide updates using the one data source.
- Plan to bring in one stage enablement process. GB (Coventry) queried how to accommodate those with different subscriptions on different site libraries. He will contact technical teams.
- Where vendors agree to work with Alma, more packages may be added to provide more granular data.

Ebook Central

- Added Altmetrics package.
- Further accessibility improvements for individual account holders to set their account preferences.
- Working on UTF-8 to improve diacritics.

Oasis

- Clearer search screens planned.

Alma

- Improved search results layouts, icons for resource type have been updated to make them clearer and been made clickable, cover images now display for ebooks to help identification.
- New APA thesaurus added.
- Machine translation improvements.

Proquest

- Old LION platform will shut down 1st August 2019.
- Improved Alexander Street Press video experience – closer to YouTube experience.
- Chadwyck Healey migrations:
 - LION – done.
 - EEBO – coming later this summer.
 - German and Spanish literature products coming Q4.
- EEBO: Everyone will get TCP texts now. These are now public domain. National Theatre videos – new collection available for subscription.

13 Date of next meeting: December 2019 at Proquest offices in London.