

sherif Proquest Enhancement Group

17th June 2021. 13:00-16:00

Microsoft Teams

Minutes

1 Attendees

- **Sherif member libraries**

- Adam Edwards – Middlesex University London (Chair)
- Amanda Quimby - University of Birmingham
- Michelle Perrott – University of Northampton
- Rachel Scott – University of Reading
- Sarah Davies – University of Nottingham (Minutes)
- Sarah Lowe - University of Brighton
- Wendy Mears – Open University

- **Proquest/ExLibris**

- Jed Gilmore - VP Customer Experience
- Cristina Blanca-Sancho - Director of Product Management
- Rebecca Ursell - Director Customer Experience EMEA
- Scott McCarthy – Director Technology
- Alexandra Follett – Software Sales Manager, UKI

2 Apologies

- Wendy Mears; Gavin Brindley

3 Welcome

- Claire Grace – Open University (item 7)

4 Clarivate purchasing ProQuest (University of the Highlands and Islands)

- What are the implications for the continuation of either RefWorks or EndNote? Does Clarivate see them as contrasting or competing products (particularly given that the JISC RefWorks deal expires this year)?
- Will there be staffing implications for ProQuest? Will their customer support address change and be managed via Clarivate?

Official response passed on by Jed Gilmore:

Please refer to the Press Release linked from about.proquest.com.

- Legal restrictions require that Clarivate and ProQuest operate as separate, independent businesses until the purchase is signed and closed. We expect that sometime in Q3. We do understand that Clarivate's current intention is to continue to offer both products to the market so that our customers will be able to use the tools that they feel comfortable using. In the future, and following closing, Clarivate may consider integrating EndNote and

RefWorks, to harness the best parts of each product, but nothing has been decided at this point.

- For the same reasons already noted, ProQuest and Clarivate have not discussed plans for staffing or any changes to customer support. However, Clarivate confirmed, “We will continue to provide the exceptional quality, client service, and support customers expect from us.”

5 Compatibility of EndNote ‘Find Full Text’ and Alma’s OpenURL (University of Birmingham)

- Currently the two systems are not compatible. Our users are unable to import the full text of references stored within an EndNote Library. The SFX OpenURL is, as it offers XML responses through REST. There is an [idea](#) on Ideas Exchange but Clarivate advise they need Ex Libris to develop something their end to make it work.
- Is there any way this could be developed as we get a lot of queries from our users?

Jed Gilmore confirmed this is on Proquest’s list of topics to discuss with Clarivate. No timeline available.

6 Primo description in Google (University of Birmingham)

- The description in Google for an institution’s instance of Primo is ‘No information is available for this page’ which is not editable by customers. As with most institutions they have rebranded the name of their Primo (For University of Birmingham we call ours FindIt@Bham).
- Please could Ex Libris add a description as it would not only help with describing what the result is but also with search rankings?

Scott McCarthy confirmed this can be configured in the Ex Libris Google console. Noted that this affects all sites. Jed Gilmore advised opening a support ticket to track this. **Action: Amanda Quimby.**

7 Elsevier / Academic Press withdrawals from the Proquest Academic Complete ebook subscription (Open University)

- The OU has tested all sorts of purchasing models over the years, having been an early adopter of ebooks (for obvious reasons). We have found that ‘evidence based’ purchasing provides the greatest return on investment. It appears that some aggregators are allowing their services to be used as an ‘evidence base’ for publishers, with which to determine the value of their ebook content and thereby the preferred licensing model to use in future so that the publisher receives maximum income.
- If a publisher places content into an aggregated collection with a view to building usage data then removing it and asking licensees to purchase it separately, we need to know upfront. The evidence of the usage data assists our purchasing decisions too but NOT our budgeting if it is done without our knowledge.
- We have been told that the Elsevier titles were added ‘in error’. Could we seek assurance that this will not be allowed to happen in future?

Claire Grace outlined the issue resulting in the loss of £50K of well used content, including a £20k encyclopaedia. Need for transparency and understanding of how the error occurred. Also June date is not a good time in the financial year for unbudgeted additional purchases.

Rebecca Ursell – Proquest and Elsevier are both convinced this was human error (at contract level not technical issue at the point of ingress). Both parties looking at their processes so that it doesn't happen again. This is the second occasion in 10 years that something like this has happened, lessons have been learnt and measures put in place to prevent a recurrence.

Action Rebecca Ursell: investigate the Taylor & Francis instance and revisit the June date for removals. August proposed instead of June.

8 Any other user issues

9 Matters arising from the minutes of the previous meeting held 17th December 2020

- Helen is now standing down from her place on the group and so a replacement is required.
Action Adam Edwards to advertise this in the new year. [Done but no applicants]

Action Adam Edwards to try again [will do so in September 2021 to avoid holiday period]

- **When are Proquest going to update Summon to APA 7th please? Response Robert Bley:** Custom citation styles will be addressed in (summer?) 2021, although trying to do APA sooner. Await more news Jan/Feb 2021. **Action: ExLibris**

Update Jed Gilmore: Confirmed APA 6th and 7th are now available through Summon. **Complete.**

- **Dedicated process for requesting titles as ebooks that are currently only available as print:** E.g. request form / page on Oasis or a dedicated email for requests, available to anyone with a Proquest or Oasis login. **Response Rebecca Ursell:** Liaised with Coutts. Sought clarification; If the form is in Oasis as well as eBook Central, is the request to make an ebook available on other platforms too? Agreement from the Group that improved ability to track progress to support academic liaison is desirable. **Action Louise Koch: post on Ideas Exchange.**

Update Rebecca Ursell: confirmed that this is on [Ideas Exchange](#). **Complete.**

- **Requesting official contract for a new resource, particularly multi-year agreements – University of Birmingham:** No timeframe yet but will get into development process. **Action:** Proquest. **Update Jed Gilmore:** Proquest does not use a contract management system. Works at order level; no concept of an institutional portfolio. However, can do this manually on request. Agreement in Group that it would be useful to have a view of everything an institution subscribes to. **Action Amanda Quimby: post on Ideas Exchange.**

Update Amanda Quimby: Unclear where such feedback should go, as it's not a product question.

Action Jed Gilmore: Will talk to the Customer Services group again.

- **Proquest eBook and Franchised partners – Middlesex University: Update Rebecca Ursell:** Outlined a new form defining authorised users and the circumstances under which institutions can give access to subscribed content. Confirmation checklist to ensure students meet criteria. Includes a section approved by Proquest lawyers around access conditions. Is the form clear and does it capture the pertinent points? **Action Adam Edwards: Share form and provide feedback by 15th January 2021 [Form shared 5.1.21]**

Update Rebecca Ursell: Answer relates only to the PowerBooks licensing model and not other products (e.g. perpetual purchases). Developed a form that goes through various scenarios. Criteria checklist determines whether partner students can be considered 'your' students and therefore authorised users. Lawyers say that if the student isn't located in the main country of the campus, some overseas areas will require an Office of Foreign Assets Control (USA Government) check¹.

¹ <https://home.treasury.gov/policy-issues/office-of-foreign-assets-control-sanctions-programs-and-information>

If partner students are not authorised users, talk to your book sales specialist to see if there's another way they can be given access. May always have to be a case-by-case decision. Documentation around the process remains internal because of the level of detail. Nothing to share publicly yet. Gratitude expressed for the clarification. **Complete.**

Deduping Academic Complete – University of Nottingham: Also thinks there are workflows they can help with to make process less cumbersome. Take offline. Action Rebecca Ursell/Sarah Davies. **Update Rebecca Ursell:** Colleague Louisa has been in touch with Jenny Hill, Acquisitions Librarian at Nottingham. **Carry action forward to June 2021 meeting.**

Update Rebecca Ursell: meetings with Jenny Hill and Digital Library Support Team at Nottingham. **Update Sarah Davies (after the meeting):** Deduping has taken a back seat until the completion of the Rialto implementation. A recent EbookCentral Auto-holdings Integration meeting highlighted that UoN good quality records for individual e-book purchases would be overwritten with inferior CZ records. The issue of duplicates within the system is seen as being secondary to the more important issue of record quality.

- **Community Zone updates area – University of Nottingham:** Log this as a bug in Salesforce. Action Sarah Davies **Update Sarah Davies:** Case has only recently been raised. **Carry action forward to June 2021 meeting.**

Complete.

- **O'Reilly ebooks collection – Open University (Wendy):** Advised to send examples to O'Reilly Support. Proquest interested in seeing extent of the problem. Rebecca taking granularity issue back. Action Rebecca Ursell. **Update Wendy Mears:** No further issues but won't be promoting this product. Impermanence of the content makes it unsuitable for OU's purposes. **Action Proquest: Feedback to O'Reilly**

Action Claire Grace to update Wendy Mears on developments since the last meeting.

14 ProQuest and ExLibris updates

15 AOB - None

16 Date of next meeting: December 2021 – online