

Sherif EBSCO Enhancement Group

28th April 2023

Meeting: 2.00-4.00pm

Present:

Kathryn Halfpenny (KH), University of Liverpool – Chair

Peter Reid (Bath Spa University) – Minutes

Heather White (HW), EBSCO

Helen Buchanan (HB), Imperial College London

Sarah Robbins (SR), Liverpool John Moores University

Alison Carroll (AC), University of East Anglia

Nadine Edwards (NE), University of Greenwich

Geraldine O'Beirn (GO), Queens University, Belfast

Steve Giannoni (SG), EBSCO,

Annette Kraweitz (AK), EBSCO,

Tammy Wolf (TW), EBSCO

Bonnie Leavitt (BL), EBSCO,

Andrew Yavarow (AY), EBSCO

Richa Tiwary (RT), EBSCO

1. Apologies for Absence:

Susan Craig (University of Sunderland), Emma Hollinshead (Aston University)

2. Welcome & Membership Update (KH).

Alison Carroll from the University of East Anglia was welcomed to the group. Kerry Hadaway from the University of Southampton has left the group.

(The session was recorded from this point on.)

3. EBSCO Developments – new EBSCOhost UI/ Mobile App (moved from item 6. on the original agenda).

AK (product manager for the new UI and EBSCO mobile app) introduced the EBSCO mobile app UX and research roadmap. The app now defaults to full text; there's now a web-based eBook viewer. In April releases we'll see recommendations on the landing page and in July release, on the detail page (up to three recommendations will be generated).

TW (Senior UX researcher) presented a UX research report (on the EBSCO mobile app). EBSCO undertook a diary study – a way of understanding long-term behaviour, having a user making daily logs, which allows insight into real-time user behaviour. Eleven participants from a public research University in the US took part over a week long study, using researcher personas and interviews pre and post to the research.

Findings showed that behaviour was similar across personas, apart from where refining and filtering goes. The mobile app was seen as a complimentary tool to more in-depth research (most articles being emailed and read on a desktop). Having an audio version of articles was considered important. Related

terms were considered helpful for general searches in particular. Desirable features for future development included being able to rotate screens to landscape to read articles. The benefits of My EBSCOhost account weren't quite clear and having non full-text results appearing was considered a negative. All participants would recommend the app to a peer. EBSCO assessed against a metric called System Usability Score (SUS), used across industry, and the app scored highly. Tammy shared a link to a system usability score system: <https://www.usability.gov/how-to-and-tools/methods/system-usability-scale.html>

SG suggested members could perhaps forward their own students to recruit for a future study; Tammy welcomed this, and shared her email to that effect: twolf@ebSCO.com.

AK spoke on the mobile road map. She went through the list of development priorities, in order: one, to bring the eBook reader back into Android (it was removed a year ago). Two, the ability to un-filter the source type limiter (to remove the check mark). Three, to make the publication date filter more granular than the set current choices (past year, five years, ten years, etc). Four, citations and sharing – EBSCO intend to implement a new PDF and HTML viewer with citation and share options (similar to new EDS / EBSCOhost UI). Five, sharing and export options, including the PDF within the email. Six, auto translate function for 30 plus languages. Seven, text to speech (TTS), to improve the tone of the voice to one that's less computerised, for both PDF and HTML full text. Nine – bringing in language filters – possibly under the 'Source type' filter. Ten – advanced search – considering what is needed for the app (especially for 'power researcher' persona) – considering things like multiple search fields, additional filters, search modes and expanders. EBSCO see the app as a quick-use for on-the-go use, so not sure whether advanced search is needed. Asked for feedback. AC suggested that more emphasis on post-search filtering than advanced pre-search inputs would seem to be more useful for the app use-case. Eleven – search enhancements - searching for terms within the full text of the article may be baffling advanced searchers who don't see their term in the results, so the functionality to toggle this on or off is being considered.

BL: is working on new UI, authentication, APIs. New UI for EBSCOhost is going to be a heavy focus for the coming year and 2024. It will utilise a lot of the same components as the EDS UI. So – for basic search and full text retrieval customers (e.g. schools), adoption is recommended now. They anticipate academic customers adopting by June or July of 2024. Recommendations (as with mobile) will come in July – suggested or recommended results.

Major EBSCOhost milestones were shared (recommendations and top of results placard in July '23; ability to default to Advanced Search, have search alerts and MeSH Authority Tree view in October '23; Publication and Classification Subject Authorities as well as Database-specific limiters in January '24; Journal alerts in April and Exposing field codes and migration of custom folders in July '234.

HW gave a search update (EBSCOhost and EDS): update to the roadmap is coming soon – this a sneak preview. Filter enhancements – the ability to narrow results, and to exclude records from catalogues and institutional repositories. Heather is also interested in user recruitment for UX testing in the areas of filtering; one area is the 'stickiness' of filters – when modifying a filtered search, having some selections sticking for that modification. More options to customise the display of filters will be part of gradually moving over from EBSCOadmin to the configuration part of EBSCO Experience Manager (a complex process!), which will be over the coming two years.

AY spoke on his work taking subject authorities like MESH, CINHALL etc from old UI into the new UI. In Academic Search they've dispensed with an alphabetical list of search terms when thesaurus searching within Advanced Search; they've also dispensed with the 'terms contained' search of a database (there was not enough functional difference with 'term begins with'). The ability to explode a search into related terms is now there. The ability to quickly add recommended terms (e.g. when a search term is not the correct one for a subject) to an advanced search is also now there. Tree view is in development (hopefully for the end of summer), and will have the hierarchy of the tree, with major concept and explode options, with sub-headings, to pinpoint different terms within the tree. Search alerts will come in stages. Users will need to be authenticated; inputs include descriptions, date created, frequency, expiration date. Under the Searches menu of MyEBSCOhost, both search history and alerts will be viewable, starting with saving a search alert for an individual, and moving towards sharing searches with others in projects, and finally towards journal alerts.

SG reiterated that the new EDS UI is being rolled out by customer choice, via preview access (seeing your current EBSCOadmin EDS profile settings in the new UI, also having access to Experience Manager to tweak things). The actual change is a flip of a switch by EBSCO staff on their admin side.

AC asked whether some integrations like Third Iron Browzine are only available after you have migrated. BL answered that no, they will show on the preview instance. Saved items will migrate (items from the general folder), but the nested folders won't migrate until July 2024. Only 2% of customers have users with nested folders. [cWolf@ebSCO.com](mailto:cwolf@ebSCO.com) can help with questions over things like this.

4. Minutes of Previous Meeting & Matters Arising

Attendance list in minutes was updated. PR fed back about assessing the accuracy of metadata in EDS through customlink testing on search terms for the most-used database in Bath Spa's profile to achieve a percentage score for likelihood of reaching the desired full text. As in the exercise from 2021, Gale's databases (e.g. OneFile and OneFile:News) score lower (lack full text or links don't resolve to the expected location), so are likely the cause of more student dissatisfaction, and in 2022 ERIC was leading to many more broken links than in 2021, although on investigation in early 2023 these had been fixed.

5. Enhancement/Issues raised by Sherif members / Feedback from EBSCO

EBSCO Platform	Issue or Enhancement	Description	Reported /Requested by	Status April 2023	Action
(a) GOBI	Enhancement	<p>OA eBooks - planned enhancement for GOBI & ECM to show OA titles in 'your collection'</p> <p>OA Monographs from the following publishers now available to order in GOBI (not ECM) Bloomsbury, De Gruyter, Duke UP, EBSCO eBooks, John Benjamins, JSTOR, Manchester UP, Project Muse, Taylor & Francis, World Scientific</p>	Queens University Belfast	<p>New EBSCO ebook platform to be released to beta partners Nov 2023. Official name of new ebook platform not yet announced. It will have a new back-end infrastructure.</p> <p>KP asked whether the new platform not require Adobe Digital Editions, and it was clarified that the new platform is for ordering and management of titles via the desktop (ADE is for the end-user platform).</p>	EBSCO to update on progress Nov 2023 meeting
(b) EBSCO Ebooks	Enhancement	The further requirement to register for & install an Adobe Digital Editions, create and log into an EBSCO profile, appears to be onerous and unusable	University of Liverpool / Observations from SHERIF Group	EBSCO mobile app does not require ADE. JM EBSCO accessibility goal to deliver DRM	Joe Munzer to investigate instances where ADE is required – update from EBSCO at Nov 2023 meeting

		<p>for some of my students and the above is being subject to complaints and requests to obtain texts from other sources such as Vital Source.</p> <p>One institution reported they have switched off the option to download to ADE due to the issues it creates</p>		<p>free content where possible. SG :Content can be downloaded DRM free if users download eBooks by chapter rather than the whole book. SG is considering talking to libraries about engaging with them on requirements for a replacement for Adobe Digital Editions.</p>	
(c) EBSCO Mobile App	Issue/Enhancement	Some experience of failure to link to content when successfully authenticated & logged into personal accounts	University of Liverpool	New version of mobile app tested by UoL & initial testing shows improvement	SHERIF group to test functionality of new app & report at next meeting
(d) EBSCOhost /EDS	Issue	Google sign in option is problematic for some; particularly due to library staff being unable to carry out user password resets	Multiple institutions	EBSCO have made some changes to the sign in page – alternative sign in options are	

				now grouped together below the boxes asking for credentials, which has made a difference.	
(e) EDS	Issue	EDS administrators can no longer reset any user passwords, whereas previously this was possible for username/password accounts.	Teesside University University of Sunderland	EBSCO encouraging users to use 'forgot password' process. SG is advising housekeeping for EBSCOadmin accounts – using the same email for multiple accounts may lead to the impression that there are more expiries. Reducing the number of admin accounts is advised	How do members feel this approach is going? Any on-going issues?
(f) EBSCHost/EDS	Issue	Issues with exporting results from EBSCOhost databases to 3 rd parties such as Endnote were reported; including insufficient export	University of Liverpool	Usually occurs with systematic reviews, max export limit is 25,000	KH seeking feedback from U of Liverpool colleagues

		limits and error alerts appearing to be more frequent			
(g)EDS/EBSCO net	Issue	Activation inaccuracies in EDS where there is integration with EBSCOnet		EBSCOnet/EDS institutions to monitor at 2023 renewal season	No significant issues reported

6. Accessibility (SG)

SG referred to his email from 17 April to the EBSCO enhancement group titled 'EBSCO Sherif Group & European Accessibility Act Discussions', where he invited members to engage with Kara Kroes Li, who wishes to understand our responses to the European accessibility act regarding eBooks, and how this might shape and validate EBSCO's eBook strategy. Kara followed up Steve's email on 27 April with a little more detail on what she's looking for.

KP suggested that accessibility could be a focus for the next Enhancement Group meeting, to which there was general agreement from members.

7. Any Other Business

None.

Next meeting: TBC; Possibly 8 November 2023