

Sherif EBSCO Enhancement Group

Meeting via Teams, 15th May 2024

Present:

Helen Buchanan (HB), Imperial College London

Allison Carroll (AC), University of East Anglia

Susan Craig (SC), University of Sunderland

Beverley Delaney (BD), Open University

Nadine Edwards (NE), University of Greenwich

Kath Halfpenny (KH), University of Liverpool (Chair & Minutes)

Nicola King (NK), Teeside University

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

Peter Reid (PR), Bath Spa University

Sarah Robbins, Liverpool John Moores University

Steve Giannoni (SG), EBSCO

Bonnie Leavitt (BL), EBSCO

Chris Atkinson (CA), EBSCO

Becky Cottrell (BC), EBSCO

Michael Napoleone (MN) EBSCO

Nathanael Jyh-Neng Lee (NL), EBSCO

1. Apologies for absence:

Apologies were received from Emma Hollinshead of Aston University and Dita Krauze (City University)

2. EBSCOhost new UI: Update & Latest Developments

BL -Updated on the development of the new EBSCOhost user interface (UI). Over 50% of EBSCO customers worldwide are using new UI for either EBSCO Discovery Service (EDS), EBSCOhost (Ehost)or both. EBSCO are looking to have migrated most EDS customers in August 2024, and eHost in January 2025. Overarching goal is to that by August 2025, the classic UI will have been deprecated, and all customers will be using the new UI. An opt-out model for adoption of the new UI is in place, with acknowledgement that academic customers will want to migrate over a vacation period rather than mid-academic year. Migration date will be assigned to institutions with a minimum of four months' notice, with the option to opt-out of the proposed date via EBSCO Sales Representative.

EDS new UI is largely complete aside from some work focused on patron empowerment and real time availability.

Ehost new UI functionality development in progress and centres around specialised limiters, alerting, bulk export, custom folder import. Most of this functionality is coming out over the next six months, hence the January 2025 timeframe for migration to the new UI but acknowledged this is tricky for the academic calendar so institutions will have the option to opt out until summer 2025.

The [EBSCO NEW UI Roadmap](#) shared with the Group, available in EBSCO Connect, is being updated frequently (previous version of Road Map was updated quarterly). EBSCO customers can obtain detail on features and functionality, with expected release dates. Date stamps will be available to show when a feature was delivered.

Enhancement requests are being monitored to collect direct feedback from EBSCO customers to continue to inform the Road Map and decisions around product functionality. 10-20 enhancement requests per day received by EBSCO. The product team deduplicate these and assign to the appropriate product manager, who then prioritise.

Small focus groups and user groups such as the Sherif group are also feeding into developments.

The EDS listserv is in the process of a refresh. A new option expected later in Spring 2024.

'Recommendations' for users is available in the EDS new UI (desktop and mobile app versions), powered by subject metadata and algorithms.

Sticky filters – first requested as an enhancement in 2011 is available in the new UI. Users can keep persistent filters when changing search terms, rather than having to reapply filters each time for a new search

Question (AC): Will enhancements be rolled out in a cycle, or as and when as priority dictates?

Answer (BL): Enhancements roll out in two ways. Either by incorporating suggested enhancements in the full support for a product area, or smaller features may be resolved via a 'quick win list' where possible. Any resolutions are noted in the release notes on EBSCO Connect

Artificial Intelligence (MN)

MN updated the group on EBSCO's development of artificial intelligence (AI). EBSCO have been using AI for several years in back-end processing and metadata categorization, support team and basic chatbot services. EBSCO are exploring the opportunities generative AI will bring, with acknowledgement of some of the concerns there can be around the use of large language models, inherent biases, inequalities or ethical concerns around the use of AI. EBSCO have developed a set of guiding principles to support ongoing development projects. These principles are Quality & End User Value, Information Literacy, Transparent Equity, Privacy & Data Protection and Publisher Integrity.

Current Beta testing of four AI features:

Generate AI Insights to help user evaluate search relevancy, labelled as AI so user is aware they are opting to use an AI feature

AI Search Results Insights – constructs searches based on natural language searching

Literature Review AI interface – retrieves relevant text, summarises.

Research Assistant to chat with

Question: Why is the Generate AI Insights option not available on all records?

Answer: Due to the guiding principles, the option is only available when the full text article is available to prevent hallucinations and inaccuracies. Some publishers have different levels of willingness for their content to be included in Generate AI Insights, so some have opted out of it

Question (BD): Will Generate AI Insights be standard functionality or a paid option?

Answer (MN): EBSCO is still evaluating but anticipate that at least some of the Insights functionality will be standard.

Question (AC): For publishers who have currently opted out of having their full text included, is this something EBSCO will continue to revisit as confidence grows in this kind of tool?

Answer (MN): Yes, we are all learning through this together and some publishers have expressed that they want to see how things play out. EBSCO envision it being an iterative process.

Publication Finder / Full Text Finder (BC)

BC provided a demonstration of the newest version of Publication Finder. A new version was released a few years ago as an optional adoption. A number of improvements made since then. The migration for all customers using PF will align with migration of a customer's EDS or Ehost migration. New features include targeted search where a user can target their search for a particular data element eg. title, identifier author or subject. An all-field search is also available.

Title history (Eg merged publications, change of title, change of publisher) have always been a challenge for users and librarians. The title history and title relationship option allow a user to search for an old publication

name and find where that title is now (eg. new title or titles if split), provide those result items to the user and enable them to continue their research.

EBSCO Folio customers – licence terms configured in Folio will be exposed in the new UI for EDS customers.

Full Text Finder – new UI FTF link resolver is available. The URL for new FTF is slightly different so libraries can keep classic FTF for their users while they review the new version. Full transition to new FTF will coincide with migration to the new EDS UI.

HLM Marc updates service: improvements are planned for package level metadata

Collection Assessment Tool –Will be available in Holdings Management and provides overlap analysis functionality to assist libraries in making better budget decisions. Partial and full overlap analysis will be available.

Holdings Management- enhancement in progress will allow library administrators to configure their custom package display names to provide a more meaningful name to end users

Package level search & browse workflow within Publication Finder

Full Text Finder Diagnostics feature – will benefit Tech Support but also institutions who want to understand more about why certain links qualify for display and others don't.

Question (PR): Is the new UI for the link resolver landing page already available and do we have to ask to be migrated?

Answer (BC): Yes it is available, via your account in the configuration in EBSCO Experience Manager, where there is a new Full Text Finder area on the left hand side. The URL specific to your institution can be copied there.

Question (PR): Do we have to request EBSCO to make it live or do we just press a button on Experience Manager?

Answer (BC): Just start using it and update any of your links. At the point in time we do start to do that definitive migration of customers over to new UI, we will put in a redirect service that would redirect any classic links over to new links.

Question: (GO): Can I just check Summer 2025 is the time everything will have moved over for Ehost and EDS? No legacy after that?

Answer (BC): Yes that is the goal

Linked Data (NL)

EBSCO want to use linked data to make academic research more intuitive and support the role of the libraries of core research partner. NL outlined developments in this area which is closely linked to AI developments. Citation discovery is one feature under development. A Beta programme is open to interested institutions and is expected to run from late 2024 with a first set of features due in May 2025.

3. Minutes & Matters Arising

Minutes from the meeting of February 2024 were accepted'

KH has requested the Group webpage be updated on the Sherif website with the minutes of the April 2023 meeting

EBSCO Platform	Issue or Enhancement	Description	Reported/Requested by	Status Feb 2024	May 2024 Update
Pidgeon Digital content on EDS	Enhancement	Add Pidgeon Digital content to EDS	Pidgeon Digital	Pidgeon Digital content not currently available for EDS customers	SG will check with BL on status but contact between Pidgeon Digital & EBSCO is active

4. Enhancement/Issues raised be Sherif members

Platform/Service	Issue/Enhancement	Details	Raised by	EBSCO Comments (SG)
EBSCOhost (Classic)	Issue	Wildcards. According to EBSCO help pages, searching for, eg, "tumo#r" should bring up the results for both "tumour" and "tumor". However, in practice the number of results for "tumo#r" is smaller than either than the variants. EBSCO Connect Case 5715221	City University	<ul style="list-style-type: none"> • Using wildcard characters turns off query expansion for plural and possessive forms of the word and for synonyms. Consequently, search results can be lower when searching with wildcards. • Results with wildcards are not always lower or always higher. It depends on the search and how wildcards are used. • Currently, a search for tumor automatically searches for tumour because these are alternate spellings of American and British English. • Our search engine automatically searches common American/British spellings behind the scenes, along with searching plural and possessive forms (tumors / tumor's / tumours / tumour's). • Also, our search engine automatically expands a search for tumor or tumour to

				<p>neoplasm because neoplasm is an alternate term for tumor and is generally useful for users searching for tumor.</p> <ul style="list-style-type: none">• Using any wildcard in a term turns off automatic expansion to alternate forms and synonyms for that word, so a search for tumo#r searches only for tumor / tumour. <p>This occurs because wildcards have the potential to greatly expand the number of search terms, beyond the maximum number of 2000 expansions per term, which would slow response time for search results</p> <p>The help page on EBSCO Connect identifies restrictions and limitations when using wildcards. Excerpt shown below.</p> <p>https://connect.ebsco.com/s/article/Searching-with-Wildcards-in-EDS-and-EBSCOhost?language=en_US</p>
--	--	--	--	--

		<p>(In addition, use of wildcard suddenly was getting autocorrected which wasn't immediately obvious - this issue can be switched off in</p>		<ul style="list-style-type: none">• This negative behaviour of autocorrect was an unintended consequence of implementing autocorrect and was not known at the time autocorrect was released.• There is a feature in the backlog to address this issue with a software enhancement.• The enhancement is being considered for the next development cycle (PI) beginning in mid-July and is in the process of being prioritized against other features.• If the autocorrect/wildcard feature makes it into the next release, it would be delivered in the Aug-Oct timeframe. We can't say yet whether it will make the release.
--	--	--	--	---

		admin but no notification of the change		
EBSCOhost (Classic)	Issue	Deduplication. When cross-searching several EBSCO databases, the number of unique (deduplicated) results is not immediately displayed. The displayed	City University	<ul style="list-style-type: none"> • Currently, there is no way to report the number of unique records in search results where hundreds, thousands, or millions of records are returned from many different databases. • Unique records exist within each database and are not known <i>across</i> databases. • Deduplication occurs at retrieval time, as records are retrieved for display from distributed indexes for different databases.

		<p>number of results is the total of all databases (database A + database B... etc). User doesn't know how many unique results they are getting, unless they click through to the very last page of the results where there's a message: "Note: Exact duplicates removed from the results". This should be</p>		<ul style="list-style-type: none">• Only a small number of records are retrieved for display initially, enough to display a few pages of results, so the user gets a speedy response.• After the initial set of records is retrieved and deduped, further deduplication occurs as more records are retrieved for display as the user pages forward.• The customer's requested enhancements will be possible once we execute across major initiatives on our search architecture roadmap that will match all content globally before indexing.
--	--	--	--	---

		<p>made clearer from the beginning. The unique results also don't appear in search history. In addition, the search results page is hard to navigate, it would be useful to be able to have a "First" and "Last" page option at the bottom of the search results, not just a couple of pages back or forth as it is now. EBSCO</p>		
--	--	--	--	--

		Connect Case 5815964		
--	--	-------------------------	--	--

5. Membership Update

Dita Krauze from City University has joined the group

6. Future Meeting Topics

The forthcoming new UI migrations were discussed as an important future and on-going topic for the Group. Some immediate discussion on the new UI took place.

BD asked if dual access for the new Ehost UI and classic UI would be available. SG confirmed tandem access is available to preview the new UI and institutions can contact their EBSCO databases account manager to arrange this. SG confirmed EBSCO is confident the functionality expected to be delivered by January 2025 will be available. If opting out and requesting a Summer 2025 migration, institutions will be able to update their user guides for the new academic year.

KH: University of Liverpool have been assessing the preview of the Ehost UI. Liaison Librarians have tested functionality and identified some as yet unavailable features they regard as red lines for migration. This combined with the need to update user guides indicates a summer migration would be Liverpool's preference.

PR: Bath Spa have migrated to EDS and Ehost new UI. Noted that a filter on Business Source new UI for Marketline reports was a desired feature. SG confirmed there will be a specific business searching interface due for preview later in 2024 (likely summer 2024)

BD: Asked about links re-directing. Will re-directs be permanent? Open University runs modules for 5-7 years so longevity of links is important. SG believes it will be a long-term re-direct but will get a definitive answer

Action: SG to confirm longevity of URL re-directs from legacy systems

Further discussion on AI developments took place, and also suggested as a future meeting topic. EBSCO Passport (browser-based plug-in) was also suggested as a future topic.

7. Any Other Business

SG noted some structural changes to the UK EBSCO team. The focus is now more geographic in focus, covering all markets. SG, Chris Atkinson and Claire Honeybourne cover the three geographic areas for databases and discovery. SG still covers journals and books nationally.

Next meeting November 2024 (TBC)