sherif ProQuest Enhancement Group

Monday 11th Dec 2023 14:00 – 17:00 UTC

Microsoft Teams

Minutes

1   Attendees

Sherif member libraries

Wendy Mears – Open University (Chair)
Sarah Lowe – University of Brighton (Minutes)
Amanda Quimby – University of Birmingham
Rachael Scott – University of Reading
Mas Sore – University of Northampton
Elie Vicente Tsarouhis – SOAS, University of London (joined part-way due to other commitments)

ProQuest/Ex Libris

Jed Gilmore – VP Customer Care – Academia and Government
Stuart Beach – Director of Product and Platform Management
Cristina Blanca-Sancho – Director of Product Management
Martin Buescher – Director, Customer Care
Tamar Ganor – Senior Product Manager (unable to attend entire meeting)
Liron Klein Levy – Director of Content Ingestion
Scott McCarthy – Director Technology
Alan Oliver – Director of Community Engagement (unable to attend entire meeting)

2   Welcome and apologies

Apologies received from Sarah Davies, University of Nottingham.

Wendy gave her thanks to Gavin Brindley from Coventry University for his time and contribution to the group noting that his wisdom and knowledge will be missed.

The group welcomes Geraldine O Beirn, Queen's University Belfast. She was unable to attend the meeting.

Alex Follett was unable to attend and was replaced by Alan Oliver for this meeting.

3   Suggested name change

Suggestion to change the group name to reflect new company structure to sherif Clarivate – ProQuest/Ex Libris Enhancement Group was accepted.

Action Chair: WM to inform sherif committee.

4   Ex Libris update

Alan Oliver presented.

5   Issues from member libraries

5.1   360 starting to feel like a forgotten product. University of Brighton – Sarah Lowe

We have had a response via the Support Portal giving us a solution for Alma, but we are not Alma customers and responses from Customer Support should align with the products we subscribe to. I had a conversation with Bloomsbury Publishing, and they cross-checked which of their collections were available via Alma against the collections in 360 KB and confirmed that 360 KB was missing some collections even though the files have been passed to Ex Libris.

Ex Libris response: Reassurances that 360 is not a forgotten product and that all collections should be reflected in all knowledgebases (KBs). Currently work ongoing with Bloomsbury to make sure all collections are available in all KBs. Ex Libris is clear when they communicate with publishers to distinguish between the KBs and the discovery layer. Response from support portal that referred to Alma was erroneously routed; internal procedures have been refreshed so this shouldn't happen again.

Group response: AQ raised a similar query with regards to Classic Primo and Primo VE and the perception that Primo VE is taking precedence over Classic Primo.

Ex Libris response: Reassurance given that Primo is still an active product undergoing development. Most UK customers using our discovery products have Primo VE with the remainder split fairly evenly between Primo and Summon. It was also noted that customers wishing to move to Primo VE from Classic Primo could do so at no charge.

5.2   Unsustainable options provided via the Support Portal for a ProQuest product (Health and Medical Collection) with regional/territory restrictions. University of Brighton – Sarah Lowe

Case 06917169. Only 1 database choice in 360 KB so we chose it assuming that was for all customers, but users were then being directed to content we didn't have access to. We requested a collection that reflected the access we had in the UK. Options provided were to use the database already in 360 KB but deselect the titles we didn't have access to. I pointed out the solution provided was unsustainable as it would involve us checking about 3,000 titles each month. I was then told that what I was requesting was an unauthorized region-specific 360 database (how can it be unauthorized when the product was sold to us through ProQuest) and that we would have to create a library specific database. I pointed out the limitations of library specific databases and how that was not really a suitable option for a third-party database sold through ProQuest. This case was finally resolved on 20th November with the creation of a UK specific database for Health and Medical Collection, but the initial response was slow and the solutions offered to us were not acceptable.

ProQuest response: It is not possible for there to be every territory-specific option available in the knowledgebase so it is case of creating them as and when needed. University of Brighton is the only UK customer that has the Health and Medical Collection.

Group response: SL highlighted the requirement to have these collections in the KB if we subscribe to them and thanked ProQuest/Ex Libris for the creation of the database and also reported that article level linking was now also available.

5.3 Relating to item 5.2 of December 2022 meeting. Item level linking delays for new collections. University of Brighton – Sarah Lowe

March 2023 - response from Vivien Antwi: "We have taken your feedback on board and amended our process to better align the release of content and the article level links associated with them. We realised that we had a flow issue because of the way the content flowed through the sub teams. We implemented this process at the start of this year, and I hope you see an improvement in due course but do please flag if you still have issues. I will highlight this issue again within the teams to ensure the new workflow is being followed".

Ex Libris response: New workflow in place. From 2024, we can expect to see article level linking for new collections available quicker.

5.4 Unhelpful Primo site descriptions in Google search. University of Birmingham – Amanda Quimby

Long standing issue – closed case 05377921. The description of an institution's Primo site appears as 'No information is available for this page' in a Google search, so a user doesn't know what it is. It is not editable for a customer to do and requires Ex Libris to edit it.
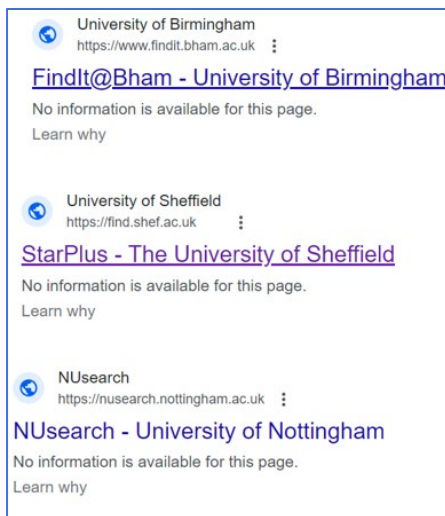
Ex Libris response: A new call was set up last week to revisit this.

Group response: SL reported the issue is the same for Summon instances in Google.

Action Brighton: Open a case related to Summon.

5.5 Metadata discrepancies over availability and pricing. York St John University – Chloe Beswick

These have impacts on budgeting and planning. Some examples:

1. Price query on 9781292251806, Order price £57.99. Price query as now £122 but still shows as £57.99 on Oasis.
2. Original order price for ebook 97899470710647, £60 – price quoted as £94.29 – a 57% increase.
3. Sales Order No: 25690845. Ebook title 9781915080394 advised no longer available on Ebook Central (11/10/22). Oasis states this item is still available.

ProQuest response: In example 1, the root cause is the pricing is not a continuous feed so the pricing only relates to the last time an updated price was supplied which may of course be out-of-date. Customer Services Team can always run a price check. In example 2, ProQuest were unable to match the ISBN in Oasis. In example 3, the title was removed from sale and then re-instated but was not for sale when query was submitted.

Action York St John University: Raise a case FAO Stuart Beach.

5.6 Linking issues from "Trial access to library electronic resource" letter. Nottingham University – Sarah Davies

Inconsistent links from Alma generated trial mailings are forcing a manual approach to gathering feedback from trials. The initial Trial access to library electronic resource letter, which is emailed to interested parties from Alma on the day a trial starts, is set up so it should include links to both the trial and the survey form. Only a few of the letters include both. Most letters only include the link to the survey. The same issue happens with the reminder letter, which is emailed out 7 days before the trial ends. Original case – 06053479 – raised in November 2021. In January 2022, we were told that ExLibris had understood and replicated the problem but weren't going to fix it and closed case. A new case 06696947 - Problem with trial - was opened in March 2023.

Ex Libris response: A fix related to this issue was implemented with September 2023 Release. However, Sarah confirmed before the meeting that according to their tests it is still not working consistently. A new case 06979956 was submitted. Issue is being chased with R&D.

5.7 Disappearing titles. University of Brighton – Sarah Lowe

360 Core - Subscribed titles set to not tracked in selectable databases.

Never have we worked with a product that undoes the work we have done. We have had to implement new and time heavy workflows to keep on top of this, but it is not really acceptable to have a product that undoes what a customer has already done.

Ex Libris response: This is a known issue and Ex Libris are aware that is a painful one, but it can only be resolved with a complete re-design of the underlying architecture. Ex Libris colleagues are working on increasing the levels of normalisation. If a particular database is problematic, then a support case can be opened.

6 Any other user issues

6.1 Delays creating new collections. University of Brighton – Sarah Lowe

SAGE Read and Publish 2023-2024 agreement released by Jisc on 23rd June; we were invoiced on 5th July. On the same day, I put in a request for a 2023 collection to be added to 360 KB via the Ideas Exchange:

[New Database Request - SAGE:Jisc Collections:SAGE Journals Read and Publish 2023-2024: Reading List - 360 KB](#)

- 11th July – response from Tamar Ganor: "We will reach out to the provider and ask for the metadata for this collection". Note: Ex Libris didn't need to reach out to the provider as I had provided them a link to the public KB Plus export page providing a KBART title list.
- 26th September – a customer asks when this will be added to Alma CZ.
- 4th October – a customer asks when this will be added to Alma CZ.
- 5th October – I add a comment to point out that we are still without a 2023 database.
- To date, I have received no further response.

Most publishers change their title lists every year to accommodate transfers, mergers, launches, cessations etc. This is not new, and it is not going to change but we need a product that can reflects those changes in a timely manner.

Group response: Since submitting this issue for the minutes, the idea was updated, and University of Brighton discovered a database has been created in October but we hadn't been informed. Submitting to the Ideas Exchange doesn't seem to be a very good solution and there doesn't seem to be any follow-up in place on comments left there by customers.

Ex Libris response: Comments sent post-meeting: We have created the new workflow to improve tracking and communicating the addition of new collections. This example is valuable for us to understand how we should fine-tune the process to improve the overall experience and satisfaction of both the community and the content providers. Our plans for 2024 are to use the newly introduced tracking process to identify bottlenecks and expedite the process.

7 Matters arising from the minutes of the previous meeting held 11th Dec 2022

8 ProQuest updates

Stuart Beach and Cristina Blanca-Sancho presented.

9 AOB

9.1 Default search parameter on ProQuest platform

Mas Sore, University of Northampton. Following up on a query raised at the December 2022 meeting, Mas requested instructions for changing the default search parameter from "everywhere" to "everywhere except full text".

Action ProQuest: Cristina to send instructions about how to do this in the ProQuest Administration Module (PAM) that Mas can pass on to a colleague.

9.2 Open Access Complete on Ebook Central

Following a query, a link to more information about Open Access Complete Ebook Collection was provided in the chat - [Open Access Complete on Ebook Central - FAQ](#)

10 Date of next meeting

June 2024 tbc – online