# sherif Clarivate PQ Ex-Libris Enhancement Group

2nd Dec 2024 14:00 – 17:00 UTC

Microsoft Teams

## 1 Attendees

- Sherif member libraries
    - Wendy Mears – Open University (Chair)
    - Rachel Scott – University of Reading
    - Sarah Lowe - University of Brighton
    - Mas Sore – University of Northampton
    - Elie Vicente Tsarouhis – SOAS
    - Geraldine O'Beirn – Queen's University Belfast (minutes)
    - Leah Emery / Susan Craig – University of Sunderland (for item 3.1 on agenda)

- Clarivate
    - Jed Gilmore - VP Customer Experience
    - Lesley Thomas – VP Product Operations
    - Scott McCarthy – Director Technology
    - Tamar Ganor – Product Management
    - Christopher Rennie – Director of Product Development
    - Stuart Beach – Director of Product Management

## 2 Welcomes and Apologies

Welcome to Lesley Thomas, and many thanks and best wishes to Jed on his upcoming retirement.
Apologies from Amanda Quimby.

## 3 Issues from member libraries

### 3.1 Incorrect metadata in Primo for holdings in Cinahl Ultimate; full text indicated where none is available. (University of Sunderland – Leah Emery and Susan Craig)

- **Case numbers -** 07768208 – CINAHL current case, 07715166, 07721693

Leah Emery and Susan Craig discussed the problems with CINAHL Ultimate electronic collection including ahead of publication articles, supplemental content and additional portfolios. This has resulted in articles being retrieved on Primo where no full text was available. All issues raised have subsequently been addressed, however, there were concerns about work involved resolving problems with CINAHL Ultimate collection. ExLibris cannot do anything unless it is an enhancement request.

Sarah Lowe highlighted that there is an issue with the linking technology in that it says you've got access to all issues from which articles in press are excluded.

Jed pointed out that preprints do not fit the normal serial sequence. Tamar explained that ahead of print do not have an issue and are not assigned with coverage, which results in content being retrieved that is out of scope for subscription rights.

ACTION: There is an enhancement request for "Ahead of print" is being reviewed now within the Primo NERS. We do not know a timeline for that. Follow up on the schedule and review with Amy Pemble (amy.pemble@clarivate.com) as needed.

Clean up of EBSCO collections - removing titles not part of collection title list.

Advocacy to manage own perpetual holdings as content providers instruct ExLibris to remove holdings from collections. Update: The discrepancy of 110 titles has been addressed and the collection is no configured to reflect the actual title list.

## 3.2    Research Assistant in PrimoVE and e.g. ProQuest One Literature: (Open University – Wendy Mears)

 AI powered Research Assistant is included in PQ1Literature basic search.  The new feature became apparent in recent training. The new Research Assistant will require updates to OU training materials and helpdesk support for students.

> **Clarivate**: Regarding the advance notification for the ProQuest Research Assistant, the point is a valid criticism - we do think some sort of broad advance announcement would have been better. In advance of the ProQuest Research Assistant release, we announced it in several newsletters, invited all customers with holdings of included products to a training webinar, sent a customizable email template to sales reps so they could personally share the news with the right contacts at key accounts, and published a blog post. We would welcome feedback as to what suits you better so we can learn from this so that we can do better in the future.

PrimoVE with Research Assistant uses book reviews from the CDI in its answers which results in book reviews being retrieved rather than full text of book.  The retrieval of content that is not full text is a barrier to the OU launching the Research Assistant.

> **Clarivate**: Please check the Primo Research Assistant Overview from our Customer Knowledge Center. This overview covers functionality, Setup and configuration, what sources are included and other topics.

> Specifically on the use of book reviews, Yes, they are included because often they have good information about a book so there should be some benefit in that regard, but we take the point about not having the full text of the book. Generally, reviews do not rank very high in CDI so if there is better material, like the books, this should be preferred. Just a reminder, at this time we base the Research Assistant on materials in CDI only. If the books are in the local index, and not in CDI, they will not come up. Any examples of where this is problematic would be welcome so we can check the specific queries and see what the problem could be.

> The Research Assistant functionality is based on the expanded search in Primo. That is, everything the institution has searchable. It is not restricted to only items whey you have full text available. This is to achieve better coverage and we had feedback from a number of customers that they often cover material for which they do not have subscriptions with resource sharing or other delivery methods. Currently we have no plans to restrict to full text availability, but we are open to feedback.

**Clarivate**: Please note this ProQuest Research FAQ article from our ProQuest Support Center.

Some feedback we heard and observations about ProQuest Research Assistant that you might find illuminating:

- Research Assistant Panel on document page: 25% of users that see this panel interact with it in some way.

- Key takeaways:

  - When we ask users why they like the Key Takeaway feature, 55% of them say that it "*helped [them] evaluate the document*". Our goal with this feature is not to prevent students from reading articles, but help them figure out if the document they have in front of them can help them with their research or not, without spending large amounts of time on that quick evaluation.

  - When we asked end users why they didn't like this feature 44% of them said it was because the content was "too vague/general", because they were probably expecting an extensive summary à la ChatGPT that would prevent them from reading the article, but we're not providing that – and that's intentional.

  - Out of all the people that used the feature, only 5% of users said they didn't like it (and 44% of them was because of the reason mentioned above)

- Important Concepts:

  - 14% of users that clicked on this feature have used the embedded search to find documents containing those terms

- Brainstorm Research Topics:

  - 17% of users that clicked on this feature have used the embedded search to find more documents about those topics

- Search Term Suggestions:

  - 42% of users of this feature are undergraduates, 35% are master's students

  - 9% of users that see the terms on the results page interact with them

  - Users that use this feature are more likely to find documents they are interested in than those that don't use it.

Some Beta testers feedback:

- On the positive side*:*

  - *It's obvious you've talked to students and faculty… [PQRA] is well targeted at our student population and what they struggle with.*

- o *For me the research questions are most helpful; for students, probably the key takeaway is most helpful. With them all working together that it's definitely something I would use in my classroom.*

- o *I just wondered if you were considering marketing this to other vendors of information to use on other platforms? This would be really helpful for a lot of the articles that I'm having to read now - I wish I had this functionality.*

- On the negative side:

- o *A more interactive, dynamic layout could significantly improve the user experience.*

- o *I wish important concepts could be more transparent and state how those concepts were selected.*

- o *The Key Takeaways section isn't always available when I'd expect it to be.*

- o *Here is a search that suggested problematic terms. What steps are being taken to remove bias from the algorithms used by the Research Assistant?*

Some additional Reponses on the specific points:

Alt search terms often seem rather basic

Our experience shows that the terms that are retrieved vary a lot from search to search. We're looking at ways to improve this feature, and this feedback is very helpful. Please share any examples.

Key takeaways – 3<sup>rd</sup> paragraph often inaccurate and based upon simple keyword search inputs

The intention of the 3<sup>rd</sup> paragraph is to explain to the user how the document is related to their search query. We would welcome examples of any inaccuracies that turn up.

Is there advice on how to credit/ acknowledge key takeaway text in student essays?

We are planning to add messaging (on the screen or via our FAQ) that instructs users to check their institution's policies regarding citing AI, as that's what we have overwhelmingly heard from librarians. However, we had discussed other options, like pointing to specific guides on how to cite AI-generated output (MLA, APA, etc.) or simply telling users directly how to cite the text using various citation styles. We are keen to hear what this group thinks would be most helpful.

Discussion focused on relevance and accuracy of results retrieved using AI Research Assistant and further development of the tool. AI Research Assistant came out brilliantly in accessibility testing at OU. Jed says they are continuing to develop knowledge around sculpting and prompt technology for Research Assistant. The more information inputted into Research Assistant; the more Research Assistant will work as intended.

ACTION: Clarivate plan to add a message to databases that offer Research Assistant instructing users to check the AI use policy as defined by their institution.

**Open invitation to submit feedback on AI Research Assistant:**
ProQuest Platforms - Christopher Rennie, Director of Product Management, ProQuest Platforms

christopher.rennie@clarivate.com

Primo - Christine Stohn, Senior Director, Product Management Academic AI Christine.Stohn@clarivate.com

ProQuest Research Assistant – Cristina Blanca-Sancho, Senior Director, Product management Academic AI
cristina.blanca-sancho@clarivate.com
Ebook Central (launch end February 2025) - Stuart Beach, Directory of Product Management, Ebooks
stuart.beach@clarivate.com

There is more information on Clarivate and AI across Academic products and platforms: AI Solutions for Academia & Research | Clarivate.

# 4 Any other user issues?

Geraldine O Beirn asked when new Jisc 2025 deals will be available in Alma's CZ KB.
ACTION: ExLibris received metadata for 2025 in November 2024 and this will be made available in resource knowledge bases during the period December 2024 to February 2025. Jisc have not developed their new platform or API which will accelerate automated process of adding/updating collections in KBs.

# 5 Matters arising from the minutes of the previous meeting held 17th June 2024

## 5.1 Item level linking delays for new collections: Jisc journal big deals on Ex-Libris (Birmingham, Brighton, Open and City Universities): Update on progress

ACTION:. The Knowledge Articles have been updated so should both be suitable for your purposes. For any further queries, reach out to Tamar.

- https://knowledge.exlibrisgroup.com/Content/Knowledge_Articles/360_KB/Knowledge_Articles/360_KB%3A_360_Link_Linkers_-_Collections_that_were_recently_added
- https://knowledge.exlibrisgroup.com/360_Services/360_Link/0Product_Documentation/Configuring_360_Link_and_Setting_Up_Sources_and_Targets/Setting_Up_Linking_Targets/Linkers/360_Link%3A_Available_Target_Linking-Syntaxes_(%22Linkers%22)

## 5.2 Interoperability between Ebook Central, ExLibris 360KB and Summon CDI. City University. Tamsin Thomas – workaround discussed

This is now resolved.

# 6 ProQuest and ExLibris updates

## 6.1 Christopher Rennie, Director of Product Management - ProQuest Platforms
- ORCiD mnemonic - ability to find documents by a particular author by searching with ORCiD.

- Nursing & Allied Health Premium has added a new, more descriptive title for video carousel. MedComm videos have been removed from carousel.
- MARC records are available in administrator module for subscribers of History Vault and APA PsycTherapy.
- Date filtering quick links have been added to Health Records Premium and its child products; Medical Database; British Nursing Index; British Nursing Database and all APA Psyc products.
- My Research now allows user to sort saved searches alphabetically.
- Pendo guides have recently been added to the platform. Higher usage and account creation on My Research linked to inclusion of guide.
- The beta release of ProQuest Research Assistant denoted by sparkles icon in 2 workflows, 'Search – Search Helper' and 'Docview – Document Insights'. This can be turned off or on at account level.
- New abstracts view in Results page in certain medical products. It will be rolled out when it is verified there is no adverse effects on user experience.
- If vendors send inbound links with DOI it will be used to locate record. If no match is found, search will use other metadata included in link i.e., journal, title, ISSN, date, page, title.
- Outbound linking users are required to enter ExLibris ID in PAM.
- New products include:
  Ethnicity & Culture Magazine Archive
  Editions & Adaptations of Shakespeare (former Chadwyck-Healey)
  The Bible in English
  History Vault: Planning for the Post-World War II World, State Department Records of Harley A. Notter, 1939 - 1945
  Allied and Complementary Medicine Database (AMED)
  ProQuest One Sustainability
  History Vault: Labor priests: Progressive Politics and the Catholic Church, Francis J. Haas Papers, 1904 - 1953.
  The BBC News Bulletin Scripts Archive
  Feature enhancement for multimedia playlist on Alexander Street products – playlists more intuitive and accessible.
  Popular Culture Studies in Video
  Music Online: Classical Music in Video, Vol. III
  Global Issues library: World Events and the Media
  Global issues: Aging in the Modern World
  ProQuest TDM Studio new 'How TDM Studio works' guide

### 6.2 Tamar Ganor - Product management
- Proactively enriching bibliographic records. Enhancement is denoted in 588 field - 'Part of the metadata in this record was created by AI, based on the text of the resource.'
- No new updates from Jisc on their new platform or API. Have received 21 new collections for 2025. Up to date with 2024 collections. Average time of adding from Ideas Exchange for 2024 was 44 days.
- 7 providers - Adam Matthews, DeGruyter, GALE, ProQuest, Bloomsbury, Taylor & Francis Group and SAGE Publishing - are now live with Manifest aiming to add new collections quickly.
- Content and Metadata Management in 2024 – Updates and News webinar on Thursday 5th December https://clarivatesupport.webex.com/weblink/register/rc609edc899ba81eb9f05a77cc58cd005

## 6.3    Stuart Beach, Director of Product Management – Ebook Central

**Ebook Central (EBC)**

- Working with publishers to ensure compliance with WCAG 2.2 and planning for the European Accessibility Act 2025.
- Ebook Central Research Assistant beta available as part of product with no additional cost. It is automatically enabled but can be turned off. Insights generated from scholarly content on EBC. Insights are generated at chapter level and on subscribed/owned content. Opt-out is supported at publisher and title level. Option is available to sign up as early adopter in January 2025.
- EBC App is coming in 2025. It replaces Adobe Digital Editions on Windows, Apple, iOS and Android. It allows streamlined authentication. New user interface. A secure platform to prevent piracy or misuse.
- Moving to EPUB as preferred format in January 2025. EPUB reader will have enhanced features.
- Encourage the use of Curated Topics and Collections including librarian curated content in LibLists. Any suggestions for LibLists can be shared with PQ.
- Title Matching Fast (TMF) offers collection insights for collection development and to help maximise library budgets.
- Open Access Complete 32,000 titles is available for all EBC customers.  Opt-in via LibCentral.
- What's New in Ebook Central on Wednesday 11th December https://clarivatesupport.webex.com/webappng/sites/clarivatesupport/webinar/webinarSeries/register/2095b20f601f41c1ad7855020042e79c

**O'Reilly for Higher Education**

- Highlights available in the reader for academic customers only.
- Video transcripts sit alongside videos.
- New content inc. books, audiobooks and videos.
- AI powered search.
- New admin console navigation - cleaner usage reports and insights.

**Rialto and Rapido Integration**

- Search Rialto directly from Borrowing Request if title not available from partner.
- Acquired materials links to Rapido Borrowing Request.
- A new page in Rialto with links to commonly requested forms and services via 'Market' menu.
- Initiate requests and service access restricted to users with admin.
- New 'Subject' field in Query Builder and Facet.
- 'Holdings' toggle added to Library Activity Facet allow users to include/exclude library holdings in search results.
- Rialto Acquisitions and Rialto Selection Plans added as subject areas in Alma Analytics.
- Rialto's awards data source has been updated from Bowker to Syndetics Unbound.

**OASIS**

- New format tabs for improved accessibility.
- Three new tabs visible in Search Results, Authorize Orders, Express Checkout and Cart: Electronic, Print, and Other (Physical AV items).
- A new 'Comparison' function to compare formats and licence options.
- Tables can be sorted by price, availability and expected delivery times.
- Ebook Price API coming soon, currently in testing.
- OASIS Q4 Customer Update Webinar, Wednesday, 4th December at 16:00 GMT
  https://clarivatesupport.webex.com/weblink/register/rb005841a4a4685080d82fe40314532e4
- Previous OASIS Customer Updates are at:
  https://proquest.libguides.com/oasis/updates

## 7    AOB

Wendy thanked Jed for commitment, dedicated support and work with Sherif group over the years.

## 8    Date of next meeting: Jun 2025 tbc – online