

**Discovery Working Group Meeting**

University Librarian’s Conference Room

Thursday, December 01, 2016

2:00pm – 5:00pm

Present: Stephanie Bartz, Judy Cohn, Vibiana Cvetkovic, Joseph Deodato, Rebecca Gardner, Dave Hoover (guest), Rhonda Marker, Orla Mejia (guest), Chad Mills, Cathy Pecoraro (guest), Glenn Sandberg (guest), Gracemary Smulewitz, Ela Sosnowska, Bobbie Tipton, Mary Beth Weber, Yingting Zhang

Excused: Christie Lutz

**1. Recommendations for Improving the Link Resolver and Access to Full Text**

In consultation with experts from ILL, IIS, and CSRS, the working group endorsed the following recommendations for improving the functionality of the library’s link resolver and streamlining access to full text.

<b>Recommendation #1</b>	<b>Remove the library’s print holdings from the link resolver and present the user with only two options: full text or ILL/document delivery.</b>
<b>Rationale</b>	<p>Most users are only interested in obtaining electronic full text and perceive any other outcome delivered by the link resolver as a failure. Even when an item is available in print, patrons find it more convenient to request a digital copy rather than retrieve the item from the stacks. Furthermore, linking to titles in the catalog via openURL is not 100% reliable because many serial records lack sufficient metadata to provide precise matching. Although catalog matching could be improved by adding/indexing all valid ISSNs and loading print holdings into the link resolver knowledge base, these solutions are labor intensive and .</p> <p>Eliminating the catalog from the link resolver reduces the number of erroneous matches while greatly simplifying access to full text. When full text is available, users will be taken directly to it. If full text is not available, users will be offered the option to request it. Requests will be routed to ILL staff who will check availability and determine the best option for delivery.</p>
<b>Concerns/Limitations</b>	<p>1. Increases workload for ILL staff ILL will likely see an uptick in requests as this will be the only option for any content to which the library does not have online access. ILL will not only require more staff but also additional training as the unit takes on a greater role serving end users in the discovery process.</p> <p>2. Privileges novice users at the expense of more advanced users This “simplification” would disadvantage more advanced library users (i.e., librarians, faculty, and grad students) who regularly interact with the library’s print collections and would lose an important avenue for discovery.</p>

Users interested in print holdings would not find them through the link resolver and would have to search the catalog separately.

3. Privileges articles at the expense of other formats

Eliminating the catalog may disadvantage non-article content (book chapters, dissertations, video, audio, etc.) which are less likely to be available online or requestable via ILL, but may be found in the library's physical collection. And while books are increasingly being made available online, workflows must be in place to ensure that they are added to HLM in order to be discoverable through the link resolver.

**Recommendation #2 Rank full text providers to ensure that users are always directed to the best available source for full text.**

**Rationale**

The link resolver is configured to send users directly to full text when available. However, not all full text providers are created equally. Some link directly to the article while others link only to the title or issue. Some provide HTML full text while others provide PDFs. In cases where there is more than one provider for a given source, ranking ensures that users get the best copy of full text available. Toward this end, the working group suggests adopting one of the following scales for ranking full text providers according to criteria such as link depth, reliability, and format:

**Option A: More complex**

Rank	Depth	Reliability	Format
1	article	paid	pdf
2	article	paid	html
3	article	free	pdf
4	article	free	html
5	issue	paid	pdf
6	issue	paid	html
7	issue	free	pdf
8	issue	free	html
9	volume	paid	pdf

10	volume	paid	html
11	volume	free	pdf
12	volume	free	html
13	journal	paid	pdf
14	journal	paid	html
15	journal	free	pdf
16	journal	free	html

**Option B: Less complex**

Rank	Depth	Reliability
1	article	paid
2	article	free
3	issue	paid
4	issue	free
5	volume	paid
6	volume	free
7	journal	paid
8	journal	free

**Concerns/Limitations**

1. Difficulty of applying these criteria uniformly across all providers  
 Full text providers are set up at the platform level and may handle different packages or even individual titles differently. As a result, it may be difficult to apply these criteria uniformly across providers. Further investigation may be required to determine whether the above criteria can be universally applied or whether some modification of the scale is needed. At the very least, known offenders (e.g., Westlaw, Factiva, Newsbank) should be assigned the lowest possible rank and only offered when they are the sole full text provider.

<b>Recommendation #3</b>	<b>Resolve outstanding issue with Full Text Finder iframe</b>
<b>Rationale</b>	Some full text providers are not compatible with the new Full Text Finder iframe. The iframe offers users alternative options in case the link resolver fails to get them to full text. Some providers (e.g., Taylor & Francis) refuse to load their content within the frame. Others (e.g., Oxford and Sage) load their content but remove the iframe. Needless to say, these inconsistencies makes for an uneven and sometimes confusing user experience. The issue was reported to EBSCO several months ago and has since been escalated but we are still waiting for a resolution.
<b>Concerns/Limitations</b>	1. EBSCO cannot force content providers to play nice with its products A status update on this issue has been requested from EBSCO. Ultimately, however, its resolution will require the cooperation of other vendors. Rutgers may need to reach out to these vendors if EBSCO cannot resolve the problem on its own.

<b>Recommendation #4</b>	<b>Reduce dependence on link resolver in EDS by maximizing the availability of full text through Customlinks and Smartlinks+.</b>
<b>Rationale</b>	Link resolvers are fragile and can fail for a variety reasons. EDS offers alternative options for linking to full text that may be more direct and more reliable. For example, by using SmartLinks+ we can increase the number of direct links to full text in EDS for up to 5,000 titles. We should also investigate whether we are taking full advantage of EBSCO CustomLinks by enabling CustomLinks on our account. There also needs to be ongoing workflow for identifying and activating relevant full text links for all content added to EDS.
<b>Concerns/Limitations</b>	1. This recommendation only applies to EDS  2. SmartLinks+ increases reliance on EBSCO subscription management Because Smartlinks+ are only available for titles ordered through EBSCO, use of this feature increases the library's reliance on EBSCO's subscription management service.

Recommendation #5	Limit EDS results to full text by default.
<b>Rationale</b>	<p>Most users are primarily interested in content that can be accessed online and consider results that provide only abstracts a “waste of time.” By limiting EDS results to full text, users would only see content that is immediately accessible but retain the option to view all results by removing this filter. Full text includes not only content that is available in full text within EDS, but also any content that is accessible via “Get it @ R.”</p>
<b>Concerns/Limitations</b>	<ol style="list-style-type: none"> <li data-bbox="505 554 1024 579">1. This recommendation only applies to EDS</li> <li data-bbox="505 625 1419 760">2. Privileges convenience over relevance Defaulting results to full text favors convenience over quality or relevance. While convenience has been proven to be an important factor in information seeking behavior, its importance may vary according to user group.</li> <li data-bbox="505 806 1365 940">3. Allows for an inconsistent user experience EDS would be the only resource that limits to full text by default and this might cause confusion or false expectations since other databases would behave differently.</li> <li data-bbox="505 982 1390 1079">3. Users should be made aware that they are receiving pre-filtered results It must be made clear (within the interface as well as any support documentation) that search results are being limited to full text by default.</li> </ol>

Recommendation #6	Standardize labels and icons for full text links in EDS
<b>Rationale</b>	<p>Users are confused by the different kinds of labels and icons used in EDS to describe full text links (PDF Full Text, HTML Full Text, Linked Full Text, Full Text from [insert publisher name], etc.). The working group recommends that the different type of full text links in EDS be reviewed with the aim of adopting more uniform language and visual consistency. At the very least, it is recommended that the language used for CustomLinks be standardized and all publisher branding be removed.</p>
<b>Concerns/Limitations</b>	<ol style="list-style-type: none"> <li data-bbox="505 1589 1024 1614">1. This recommendation only applies to EDS</li> <li data-bbox="505 1661 1419 1829">2. Uniform labels may make it more difficult to troubleshoot broken links Although users do not care whether a link is CustomLink, Smartlink, or Smartlink+, this information is important for troubleshooting purposes. Accordingly, the working group recommends that alt tags be retained so that library staff can still distinguish between link types.</li> </ol>

<b>Recommendation #7</b>	<b>Remove language on proxy login page that does not apply to ILL</b>
<b>Rationale</b>	When ILL is accessed via the link resolver, users are directed to the proxy login page which contains text that may be confusing because it does not apply to ILL. Accordingly, the working group recommends: a) replacing “Accessing library databases and electronic resources” with the generic phrase “Login required”, and b) removing the link “How do I connect from off-campus?” The revised language more accurately reflects the dual role the proxy login page plays in providing access to licensed resources as well as library services such as ILL.
<b>Concerns/Limitations</b>	None

## 2. “Get it @ R” Button

At the last meeting, the question was raised as to whether the “Get it @ R” button could be redesigned in a way that might better communicate its function. To facilitate discussion, a list of link resolver buttons used at Big 10 institutions was compiled for review. Based on this sample, it was clear that the majority of libraries seem to favor the phrase “Find it” or “Get it” followed by the name or logo of their institution. Although “Get it @ R” not be immediately intuitive to all users, at the very least it seems to follow common practice among peer institutions.

## 3. Next Meeting

The next meeting will be held December 12th at 10am in the University Librarian’s Conference Room. The agenda will primarily focus on brainstorming methods for improving discovery of ebooks. In preparation, all members are advised to read the article entitled [E-books in Academic Libraries: Challenges for Discovery and Access](#) on Sakai.

Meeting was adjourned at 5:00pm

Submitted by Joseph Deodato