EBSCO USER GROUP

AGENDA

Grand America Hotel
Salt Lake City, Utah
October 25-26, 2017

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Welcome to the EBSCO User Group for North American Libraries.

We are delighted that you are here with us in Salt Lake City. We have a full agenda, featuring topics and engaging presenters that we think will pique your interest. This year, we also added bonus content for those of you arriving on Tuesday, including Library Service Engineer office hours and a student focus group. I look forward to the reception on Wednesday night, where we will have a chance to network and unwind.

I want to give a special thank you to our event sponsors, the *American Psychological Association* and *Inspec*, for helping to make this event possible.

If you have any feedback, please do not hesitate to let us know.

Sincerely,
Don Gilstrap
President, User Group Board

Tuesday, October 24, 2017

Time	Event
2:00 pm–5:00 pm	Office Hours with EBSCO Library Service Engineers
5:00 pm–6:00 pm	Student Research: The Reality Show

Wednesday, October 25, 2017

Time			
7:00 am–8:30 am	Breakfast: Sponsored by the APA		
8:30 am–10:00 am	Opening Session - Don Gilstrap, *EBSCO User Group*; George Kowal, *APA*; Carolyn Clini, Sara Earley and Gar Sydnor, *EBSCO*		
10:00 am–10:30 am	Break: Sponsored by Inspec		
10:30 am–11:30 am	**EDS Integration with SirsiDynix Symphony** - Cathy Sicard, *LOUIS: The Louisiana Library Network*; Rick Branham, *SirsiDynix*	**User Research at EBSCO** - Kate Lawrence, *EBSCO*	**FOLIO: An Update** - Neil Block, *EBSCO*
11:30 am–12:30 pm	**The What and How of Managing the Library's Collections** - Becky Cottrill, *EBSCO*	**Integrating EDS into the Curriculum: Using Search Queries to Enrich Information Literacy Endeavors** - Rachael Cohen, *Indiana University Bloomington*; Angie Thorpe, *Indiana University Kokomo*	**FOLIO Services from EBSCO** - Ron Burns, *EBSCO*
12:30 pm–1:30 pm	Lunch		
1:30 pm–2:30 pm	**Case Study: Implementing EBSCO Usage Consolidation at the University of Alabama** - Millie Jackson, *University of Alabama*; Mary Sue Hoyle, *EBSCO*	**Improving User Engagement: A Case Study from Caltech** - Heather Wilson and Laurel Narizny, *Caltech*	**FOLIO Development, Roadmap and Community** - Sebastian Hammer, *Index Data*; Michelle Suranofsky, *Lehigh University*
2:30 pm–3:00 pm	Break: Sponsored by Inspec		
3:00 pm–4:00 pm	**Choosing and Implementing Discovery – An International Perspective: Sponsored by the APA** - Takeshi Kuboyama, *Osaka University Library*; Adriana Magarotto, *Sapienza University of Rome*		
4:00 pm–5:00 pm	**From Acquisition to Discovery to Usage: How Collection Development Impacts Discovery and UX** - Michael Arthur and Kevin Walker, *University of Alabama*; Ashley Bailey, *GOBI Library Solutions*	**Falling Through the Cracks? Using EBSCO Exact Match Finder to Link Students to Forgotten Content** - Casey Swenson and Kristen Vogt, *Western Governors University*	**The Rise and Shine of the Knowledge Base in the Age of FOLIO** - Oliver Pesch, *EBSCO*
6:30 pm–8:30 pm	Reception in the Grand Salon: Sponsored by Inspec		

Thursday, October 26, 2017

Time			
7:00 am–8:30 am	Breakfast: Sponsored by the APA		
8:30 am–9:30 am	**Flipping Over Flipster: An Academic Library's Journey into the Unknown** - Ali Larsen, *Siena College*	**Moving Beyond IP Authentication: The New Frontier in Single Sign-On** - Robert Scaysbrook, *OpenAthens*; Christopher Holly, *EBSCO*	**Have Your Cake and Eat it Too: Streamlining Resource Access via Interoperable Discovery and Patron Empowerment Integration & SSO at Seton Hall University** - Elizabeth Leonard, *Seton Hall University*; Marc Keepper and Andy Sanford, *EBSCO*
9:30 am–10:30 am	**Collaborative Coding: Stanford's Blacklight and the EDS API** - Jessie Keck, *Stanford University Libraries*; Alexis Manheim, *Stanford University Libraries*; Bill McKinney, *EBSCO*	**Discovery Elsewhere: Using the EDS API in Mobile, Voice Searching, and Beyond** - Rob O'Connell, *Smith College*; Bill Mischo, *University of Illinois*; Eric Frierson, *EBSCO*	**Tips and Tricks - Widgets and Special Profiles** - Melissa Belvadi, *University of Prince Edward Island*
10:30 am–11:00 am	Break: Sponsored by Inspec		
11:00 am–12:00 pm	**Assessing Perceptions and Usability of EDS** - Dave Comeaux, Emily Frank, and Mike Waugh, *Louisiana State University*	**Forming Partnerships to Meet Accessibility Needs** - Elizabeth Leonard, *Seton Hall University*; JaEun Jemma Ku, *University of Illinois*; Jill Power, *EBSCO*	**Responding to Diverse Needs in a Large Consortium with EBSCO Applications** - Mike White and Russell Palmer, *The University System of Georgia: GALILEO*
12:00 pm–1:00 pm	**EDS Configuration Decision-Making: Lessons in Systems Thinking and Service Adaptation** - Courtney McAllister, *The Citadel*	**Virtual Reference Tools and Techniques to Facilitate Remote Discovery and Access** - John Burns, *Dixie State University*	**Transform the Users' EDS Experience: A Response to Usability Data** - Margaret Hoogland, Jessica Morales, Christine Rigda, *The University of Toledo*
1:00 pm–2:00 pm	Lunch		
2:00 pm–3:00 pm	**Spreadsheet Tips and Tricks For Working with EBSCO Usage Reports** - Melissa Belvadi, *University of Prince Edward Island*	**Improving Workflows and Saving Time: The Power of Interoperability** - Ann-Marie Breaux, *EBSCO*	**Made From Scratch: Baking QA and UX Into the SFX to EBSCO Migration** - Tina Buck and Athena Hoeppner, *University of Central Florida*

Key to Event Locations

- 🟩 Savoy: LSE Lounge
- 🟦 Grand Ballroom A
- 🟩 Murano Garden Salon
- 🟧 Venezia Garden Salon
- 🟦 Grand Ballroom D
- ⬛ Grand Salon

Tuesday, October 24, 2017

Office Hours with EBSCO Library Service Engineers

Join us for office hours on Tuesday, June 24, 2:00pm – 5:00pm, where you can meet one-on-one with EBSCO Library Service Engineers, get to know them and ask questions.

Eric Frierson, Madeline Dale, Bill McKinney, Chad McInnis, Carolyn Clini, Mike Abrahamson, Ellie Collier, David Podboy, Jesse Jensen – EBSCO Library Service Engineers

Student Research: The Reality Show

EBSCO's VP of User Research, Kate Lawrence, welcomes students from Salt Lake City universities to a focus group to demonstrate the reality of today's student searchers. Come peek "behind the curtain" and see students as they walk us through their organic search process, with lots of time for interactive Q+A!

Kate Lawrence, EBSCO Information Services

Wednesday, October 25, 2017

Opening Session

The user group meeting will kick off with welcome remarks and a look at the EBSCO product strategy.

Don Gilstrap, EBSCO User Group
George Kowal, APA
Carolyn Clini, EBSCO Information Services
Sara Earley, EBSCO Information Services
Gar Sydnor, EBSCO Information Services

EDS Integration with SirsiDynix Symphony

It goes without saying that partnerships between software companies are undoubtedly beneficial. While this may be apparent, it sometimes behooves us to restate the purpose: partnering allows us each to focus our software development on our core competencies and then work together to deliver an integrated user experience across platforms. What's more, partnerships offer choice. When these types of partnerships are realized, libraries can choose the solution that works best for them– both in terms of the back-end and the front-end.

This session will focus on the integration between EDS and SirsiDynix Symphony. Panelists will discuss the different types of integration between Symphony and the discovery layer, the implementation options that are available to libraries, and demonstrate how interoperability delivers a better user experience for end-users.

Cathy Sicard, LOUIS: The Louisiana Library Network
Rick Branham, SirsiDynix

User Research at EBSCO

Discovery has improved library search methods beyond a doubt. But how has this improvement come about and how can we ensure that the research experience is optimally aligned with user behaviors and expectations?

Improving the discovery search experience means understanding how users are in fact searching. Users, especially those from the digital native generation, are accustomed to the open web. If information professionals insist that users learn a different way of searching on discovery products, we risk imposing a poor and unfamiliar experience on those users. The design of discovery products must therefore be in harmony with the experiences that are natural reflexes for users, so that their overall experience is intuitive and aligns with their mental models and expectations.

The presentation will look at the role and methodologies of user research in informing the design of discovery services.

Kate Lawrence, EBSCO Information Services

FOLIO: An Update

In June 2016, the FOLIO project – a community collaboration to develop an open source library services platform – was announced to the library community. FOLIO seeks to change how software is developed, deployed and enhanced to allow for continuous innovation. What's more, FOLIO is built around community participation, of many libraries and vendors, who can continue to innovate over time and develop applications on top of the FOLIO platform. This presentation will discuss the current status of FOLIO. Presenters will look at how FOLIO is taking shape. The presentation will cover community momentum, the FOLIO project underpinnings and the development progress that has been made to date.

Neil Block, EBSCO Information Services

The What and How of Managing the Library's Collections

As electronic content increasingly takes center-stage in library collections, the functionality to ensure an optimized e-resources management experience must follow suit. Librarians must after all be able to manage electronic resources in an optimized way. From managing holdings to linking to full-text content, what EBSCO tools are available to support successful research? This presentation will discuss the functionality of Holdings and Link Manager (HLM).

Becky Cottrill, EBSCO Information Services

Integrating EDS into the Curriculum: Using Search Queries to Enrich Information Literacy Endeavors

At one point Google could predict a flu outbreak up to two weeks sooner than the CDC by evaluating users' search queries. Analyzed in the aggregate, search queries hold the capability of revealing not only users' information needs but also broader trends in searching behaviors. During the fall 2015 semester, librarians from two Indiana University campuses initiated a research project to examine user search terms from a semester's worth of EDS data. Queries were pulled from Google Analytics reports, assigned classes and subclasses using the Library of Congress Classification schedule, and then parsed using text analysis tools in order to identify common terms and search issues. This session will describe the methods for text retrieval and analysis, present the prevalent search queries and concerns at each institution, and share the unexpected challenges and benefits experienced during this project. We will present some of the emergent trends and issues identified from our search query examination and what steps

can be/have been taken to improve our users' experiences. Lastly, we will also illustrate how search query analysis may facilitate deeper collaborations with faculty both inside and outside the library to improve information literacy. By using search query data to connect actual user information needs with individual instructors and courses, we may have more meaningful conversations about the behaviors that are taking place and how, together, we can build students' information literacy skills.

Rachael Cohen, Indiana University Bloomington
Angie Thorpe, Indiana University Kokomo

FOLIO Services from EBSCO

In June 2016, the FOLIO project – a community collaboration to develop an open source library services platform – was announced to the library community. EBSCO is a proud participant in the FOLIO project, providing funding and project and product management expertise. For libraries who want to run FOLIO in a highly cost-efficient way, but don't have the resources to host or the staff to support the library services platform, EBSCO will offer a suite of services to meet institutions' needs and goals. These services will include implementation, data migration, workflow simplification and staged or 'phased' implementation of the FOLIO platform. Additionally, EBSCO will offer hosting, maintenance and support as well as a dedicated team of specialists for implementation and custom development. Join this presentation to learn more about the planned FOLIO services from EBSCO.

Ron Burns, EBSCO Information Services

Case Study: Implementing EBSCO Usage Consolidation at the University of Alabama

Measuring usage and gaining information about electronic resources is an ongoing issue in academic libraries. Calculating the cost per use and return on investment for high-cost resources are of particular interest in the current era. Usage is also of value when creating plans for marketing resources that may have lower use than anticipated. The University of Alabama has been transitioning from a home-grown system of usage collection that was combined with use of Serials Solutions to using EBSCO Usage Consolidation. Discussions about switching systems began in 2011. We did not fully implement Usage Consolidation until 2016, however. This case study will examine the challenges and values of implementing a new system during a time of transition in the library staff and faculty and how internal resistance to change was addressed. We will discuss the collaboration and training from EBSCO as part of the successful implementation and the current state of implementation. Finally, we will address the value of Usage Consolidation for making decisions about renewals and cancellations this year and for assisting us with creating marketing plans for electronic resources.

Millie Jackson, University of Alabama
Mary Sue Hoyle, EBSCO Information Services

Improving User Engagement: A Case Study from Caltech

There are many approaches to discovery that seek to improve the user experience and engagement with the library overall. Yet maybe the most consequential decision involves where and how to incorporate discovery in the library's front-end interface. What's more, when considering the discovery experience the library must take into account not just the front-end but also the interoperability with the ILS.

In this presentation, Heather Wilson from Caltech will discuss how the library integrated EDS within the front-end of the library's choosing. Heather will look at how the library uses a Drupal-based content management system (Stacks) to manage the front-end experience, control day-to-day content updates, and deliver an optimal discovery experience to users without involving IT. This presentation will cover a variety of solutions and how these work together including EBSCO Discovery Service (EDS) and Stacks.

Heather Wilson, Caltech
Laurel Narizny, Caltech

FOLIO Development, Roadmap and Community

The FOLIO project, now well underway, has set out to reimagine the library services platform. Design and development of the platform has progressed at a steady rate over the last year with an engaged and growing community of librarians, developers and commercial entities. Most importantly, the platform fundamentals that have been established through a network of participants are focused on delivering architecture for evolution and growth. In this session participants will have the opportunity to learn about the FOLIO project and community, as well as its current status. The presenters will discuss the project underpinnings that support community collaboration and innovation. And the presenters will address the industry shift in vendor-library collaboration that FOLIO addresses through the creation of a true platform built for community participation – vendors and libraries alike.

Sebastian Hammer, Index Data
Michelle Suranofsky, Lehigh University

Choosing and Implementing Discovery – An International Perspective

Leading universities worldwide are adopting discovery services to support the advanced research needs of a myriad of users. Indeed, discovery services are the gateway to research and institutions' collections. And there is much to consider when evaluating discovery services: the user experience, seamless access to full text, and, primarily, the relevance of results.

While similar in many ways, discovery implementations vary across the globe. From supporting different languages to accounting for different users, libraries may have different considerations when choosing and implementing a discovery service.

In this session, panelists from Osaka University Library in Japan and Sapienza University of Rome, Italy, will share their discovery experiences. Panelists will share best practices, showcase local implementations that may benefit a global audience and discuss how discovery plays a strategic role in fulfilling the library's mission.

Takeshi Kuboyama, Osaka University Library
Adriana Magarotto, Sapienza University of Rome

From Acquisition to Discovery to Usage: How Collection Development Impacts Discovery and UX

While the ability to discover important research resources such as scholarly monographs and e-books is a key priority for library patrons, the ability for libraries to find and acquire the best tools and develop focused strategies for making discovery more meaningful for their patrons is critical. In this session, attendees will learn about various ways that GOBI Library Solutions can facilitate this process.

By taking advantage of the GOBI platform, approval profiles, and a robust collection development and workflow solution, The University of Alabama has created efficiencies between GOBI and EBSCO products to help streamline their collection development practices for both print and e-books. The presenters will discuss recent changes to maximize efficiency throughout the process, using GOBI, EBSCO Discovery Service, and Usage Consolidation. Content and workflow enhancements including the availability of eCollections on publisher platforms, implementation of a streamlined DDA program, activation and upgrade to e-books in minutes for specified publishers and aggregators, tools for minimizing turnaways as well as faster print fulfillment rates will be covered. In addition, the presenters will discuss how, through workflow analysis and changes to internal policies, the library is now making discovery and access to content more efficient in meeting the needs of users. A new focus on access to content when and where it is needed has benefited greatly from the value-added services provide by GOBI and EBSCO. Specific information will be provided that supports the benefits achieved in e-book selection and access through close interaction among the library, GOBI and EBSCO. A study from one year of data on demand driven acquisitions will be presented as a basis for discussions about overall impact this program is having on usage and how EBSCO and GOBI are working closely with the library to help analyze subject coverage and other key measures. Attendees will leave with an understanding of how streamlined collection development can positively impact discovery and patrons' ability to successfully find and access the best resources for their research needs.

Michael Arthur, University of Alabama
Kevin Walker, University of Alabama
Ashley Bailey, GOBI Library Solutions

Falling Through the Cracks? Using EBSCO Exact Match Finder to Link Students to Forgotten Content

Research has shown that students don't always understand what content is available to search through the discovery platform. Exact Match Finder allows librarians to customize EDS results to reduce confusion, and point students toward content that they deem as important. This session will focus on the use of EBSCO's Exact Match Finder SaaS application to create links to content which might not otherwise show up in EDS results. Topics include using EBSCO's top search terms reports to find out what your students are actually and oftentimes erroneously searching for in discovery, using exact match finder to create a searchable knowledge base

directly in discovery results, the step-by-step process of setting up exact match finder including using branding and images to highlight specific results, and tracking usage of the application using Google Analytics. If you've ever wanted to include research guides, course reserves, and link out to other departments at your University through EDS, then this session will provide some ideas on how to do so.

Casey Swenson, Western Governors University
Kristen Vogt, Western Governors University

The Rise and Shine of the Knowledge Base in the Age of FOLIO

With the development of FOLIO – a new open source library services platform built for innovation – libraries and vendors have an opportunity to rethink legacy workflows and identify key areas of improvement. This certainly holds true for the role of the knowledge base, which, after all, is critical to supporting library workflows. The knowledge base not only provides libraries with extensive details about their collections, but underlies everything from collection development and holdings management to discovery and access. Library applications at each stage of the information life–cycle interact with the knowledge base to provide continuity of workflows and seamless integration.

There are many examples. Consider an integration with the acquisitions workflow when a faculty member identifies a much-needed resource within the global knowledge base. It also supports detailed analytics, visibility of purchasing options and streamlined ordering. Moreover, the library relies on knowledge base holdings as the system of record.

This presentation will look at the various library services that must leverage a global knowledge base to ensure overall workflow efficiencies and data integrity. In particular, the presenter will discuss the importance of the knowledge base in the context of the FOLIO open source library services platform. The presentation will look at how the knowledge base can help integrate different applications, ensuring a uniform representation of holdings. And finally, the presenter will look at how libraries can leverage the knowledge base to make informed collection decisions and efficiently report outcomes to administration, funders and other interested parties.

Oliver Pesch, EBSCO Information Services

Thursday, October 26, 2017

Flipping Over Flipster: An Academic Library's Journey into the Unknown

Many would agree that print magazines in academic libraries are on life support. While tracking usage reliably has always been tricky, we do know that their use is down, almost non-existent, as is evident by a consistent stream of titles converting to electronic format or ceasing altogether (and maybe mostly by the dust bunnies that try to take up residence). To top it off, the print collection, current and bound, is now seen as occupying coveted library real estate.

However, we know that the content remains valuable, relevant and timely; so what do we do about it? After what seemed like endlessly pondering this conundrum, while simultaneously missing the emails from EBSCO advertising Flipster, I finally connected the dots and clicked one open…

This session will document one small academic library's journey of investigating, implementing, marketing and evaluating Flipster. General and targeted advertising and outreach opportunities for Flipster to community members have resulted in documented, increased use. Coordinated efforts with specific departments and people have resulted in positive outcomes, breathing new life into our overall periodicals collection, including the current print collection! Additionally, the personal savings of time, money and counter space have been well received! Unexpected challenges along the journey won't be ignored. And, of course, there's always the money factor. Recommendations for maximizing Flipster will also be shared as well as what the future holds for our print collection. Is Flipster for your library? Perhaps! Come see how one library is flipping over Flipster to find out more!

Ali Larsen, Siena College

Moving Beyond IP Authentication: The New Frontier in Single Sign-On

The pathway to trustworthy research depends on many factors, yet single sign-on may be the one area where frustration often looms. Today's libraries often rely on IP-based authentication systems. However, these systems can pose significant security risks, lack transparency for accurate usage reporting and do not offer personalization features for users.

This session will look at the next frontier in authentication. The session will address how libraries can address authentication in a way that is more secure, supports a personalized research experience for users and is easy to set up, customize and manage. Presenters will look at the shift away from IP authentication to one that is based on readers' credentials. And the presenters will discuss how libraries can leverage statistics to gain insight into usage not just by individual users but by user categories as a whole.

Robert Scaysbrook, OpenAthens
Christopher Holly, EBSCO information Services

Have Your Cake and Eat it Too:
Streamlining Resource Access via Interoperable Discovery and Patron Empowerment Integration and SSO at Seton Hall University

When Seton Hall University (SHU) Libraries migrated to OCLC's Worldshare Management Service (WMS) in 2014, the library faculty wanted to keep EBSCO Discovery Service (EDS). However, the campus Library Information Technology group wanted to ensure patrons could access their account functionality (checkouts, holds, fees) easily; the requirement was for EDS to provide the same information (including local catalog, real-time availability, etc.) and patron account functionality as OCLC's WorldCat Local and Discovery would. In addition, Seton Hall added SAML SSO into their EDS-WMS ecosystem, moving them forward with the industry best practice of migrating various resources from proxy to SSO, achieving simplified, more secure, and personalized resource access for patrons. This presentation will review how SHU, OCLC and EBSCO cooperated to improve and streamline SHU's patrons' login process, as well as to provide unified access to SHU's catalog, availability, and patron account functionality directly within

EDS, resulting in improved, user-centric resource access, both on and off campus. This session will explain the structure of the integration, as well as perform a live demonstration for the assimilated services. We will wrap up with a discussion of possible next steps and further enhancements.

Elizabeth Leonard, Seton Hall University
Marc Keepper, EBSCO Information Services
Andy Sanford, EBSCO Information Services

Collaborative Coding: Stanford's Blacklight and the EDS API

The implementation team from the Stanford Libraries worked in close collaboration with the technical team from EBSCO to integrate EDS into their Blacklight-based discovery environment SearchWorks. This required significant work by both teams. The EBSCO team developed new technology to make its service compatible with SearchWorks. The Stanford team designed a new interface that looks and behaves like SearchWorks catalog search, but also supports many of the new EDS features.

Jessie Keck, Stanford University Libraries
Alexis Manheim, Stanford University Libraries
Bill McKinney, EBSCO Information Services

Discovery Elsewhere:
Using the EDS API in Mobile, Voice Searching, and Beyond

As the discovery user experience continues to evolve, libraries are evaluating and implementing new approaches that deliver further engagement with the library's collections. Indeed, at its core, the discovery index, a powerful, comprehensive and searchable listing of the library's resources, can be meaningful outside of the immediate discovery environment. Consider these examples: the integration of discovery within the learning management system, within a Bento environment, within a mobile interface, within Alexa or Google Home, or within the ILS interface of the library's choosing. In this session panelists will examine the use of the EBSCO Discovery Service (EDS) API to enhance the discovery experience for users.

Rob O'Connell, Smith College
Bill Mischo, University of Illinois
Eric Frierson, EBSCO Information Services

Tips and Tricks - Widgets and Special Profiles

This session will offer creative ideas on how to go beyond the basic uses for EDS. First, some interesting widgets will be demonstrated to add functionality not yet part of the main product. Second, some creative uses of profiles beyond just the obvious subject-specific ones will be offered.

Melissa Belvadi, University of Prince Edward Island

Assessing Perceptions and Usability of EDS

Louisiana State University (LSU) Libraries launched EDS in 2012, and librarians completed an initial assessment in 2014, using staff and user surveys and search logs to assess perceptions and usability. These findings led to immediate enhancements, and further adjustments have been made to the service during the subsequent years through upgrades and user feedback. In 2017, EDS was reassessed to compare how attitudes and user behaviors have shifted over this period of time. Additionally, the Web Development Librarian led user testing comparing LSU's EDS with two other academic library discovery systems. These exposed users to variations in search box and result display, including the Bento box display and traditional interfiled results display. Insights gained on user perceptions and preferences in search design and results display were used to inform changes to LSU's EDS. This presentation will discuss the planning and design process for assessing and user testing EDS, the analysis of the resulting data, and the problems identified through these processes.

Dave Comeaux, Louisiana State University
Emily Frank, Louisiana State University
Mike Waugh, Louisiana State University

Forming Partnerships to Meet Accessibility Needs

Reaching and maintaining accessibility of EBSCO products for all users takes a lot more than just putting code in the right place. EBSCO strives to get a better understanding of how all of our users approach their research. In this spirit, EBSCO strives to work directly with libraries and their students to understand their unique needs. Working with the Carroll Center for the Blind and Bentley University, EBSCO recently conducted a usability study for the visually impaired. Engaging directly with this unique population has made a significant impact on the way EBSCO thinks about its products and offerings.   In this session, presenters from EBSCO, Seton Hall University and the University of Illinois will discuss their unique approach to making their services and offerings accessible for all their students.

Elizabeth Leonard, Seton Hall University
JaEun Jemma Ku, University of Illinois
Jill Power, EBSCO Information Services

Responding to Diverse Needs in a Large Consortium with EBSCO Applications

GALILEO, Georgia's Virtual Library, serves a uniquely diverse group of institutions. Most statewide consortia serve public higher ed and public libraries. GALILEO adds public and private K12, private higher ed, and technical colleges to that mix. Join us for this 45-minute overview session, and learn how the GALILEO support and technical staff uses a range of EBSCO applications, including discovery, Curriculum Builder, placards and others, to address the access needs of a variety of library types across multiple applications, including ILS, Learning Management Systems, and an Institutional Repository.

Mike White, The University System of Georgia: GALILEO
Russell Palmer, The University System of Georgia: GALILEO

EDS Configuration Decision-Making: Lessons in Systems Thinking and Service Adaptation

When The Citadel's Daniel Library adopted EDS in Spring 2014, librarians had to make decisions about how default search results would be filtered. While EDS offers a robust suite of search refinement tools and filters, many of our users are heavily influenced by how default configuration settings dictate their search results. Initially, our librarians selected EDS settings that were designed to retrieve results based primarily on relevance to the user's query. These settings introduced users to a wide variety of resources we did not have immediate local access to, such as abstracts and indexed materials.

In Spring 2015, after receiving complaints from users who were frustrated by the plethora of top results they could not access immediately, the librarians decided to alter the default settings to privilege local availability. Rather than prioritizing the most relevant query matches, the default settings now assign greater weight to resources that the user can access immediately. This had a dramatic and instantaneous impact on the library's resource sharing transactions. Article borrowing through ILL plummeted 35% during the month following the configuration adjustment. Resolving this issue required some adaptation and experimentation. The process also revealed the profound impact of personal philosophies and organizational values on these decisions.

This session will explore the complex and nuanced facets of EDS configuration decision-making. Specifically, it will outline the ILL department's response to EDS, and reflect on the library's attempts to address how the current default filters affect user behavior, collection development, and other aspects of library service, including instruction and research assistance. While each institution must determine the default settings that best meet their users' needs, these decisions need to be considered carefully. It is a process that requires systems thinking and perpetual analysis. Even relatively simple adjustments in filters and settings can instigate wide-ranging consequences for library services and users.

Courtney McAllister, The Citadel

Virtual Reference Tools and Techniques to Facilitate Remote Discovery and Access

Virtual reference can be as simple as a phone call or a chat session, but in order to teach information literacy skill while helping users discover and access resources, one really needs to show and tell. Obviously, the librarian, in a virtual reference interaction, needs to connect in an auditory or textual manner with clientele, but add a visual component and the encounter is far more potent. Telling a student or other end user how to discover and access material for research is nowhere near as effective as showing them how. This is why the reference desk is still a viable service point. Virtual reference transactions can take on the same benefits as in-person assistance with the use of free, easy to use online tools.

Join this session to hear and learn how the librarian in any library can use the free tool JoinMe to facilitate online screen sharing to show, tell, and teach users to discover and access resources in your library collections. Using EBSCO databases, watch a live transaction take place over the Internet with the JoinMe tool, and discuss how this tool combined with best practice techniques can upgrade your libraries virtual interactions.

John Burns, Dixie State University

Transform the Users' EDS Experience: A Response to Usability Data

Discovery layers provide a one-stop shop for users within a streamlined familiar interface and have now proven to be a mainstay in libraries. After careful evaluation of discovery service products, The University of Toledo Libraries moved forward with the implementation of EBSCO Discovery Service (EDS) in January 2016. A year post implementation librarians found themselves asking – did we make the right customization selections? Are users receiving the search results they want? Are users satisfied with EDS? Did we brand the product appropriately? In order to answer these questions and to gain a better understanding of how users navigate EDS, the University Libraries conducted a usability study. This presentation will cover an overview of the implementation process of EDS, conclusions from the usability study, the data driven decision-making process to address issues unveiled by the study, and our experience working with EBSCO to resolve issues.

Margaret Hoogland, The University of Toledo
Jessica Morales, The University of Toledo
Christine Rigda, The University of Toledo

Spreadsheet Tips and Tricks for Working with EBSCO Usage Reports

This session will introduce techniques to get the most out of EBSCO's non-COUNTER reports. It will focus on using Google Sheets, but most methods will also apply to Excel. This is designed for beginner/casual spreadsheet users, i.e. who aren't familiar with features like pivot tables and lookup.

Melissa Belvadi, University of Prince Edward Island

Improving Workflows and Saving Time: The Power of Interoperability

Libraries, like any enterprise, deploy a large number of software applications. Ranging from ordering solutions, to ILS, to discovery, these applications should work together to remove redundancies in workflows and deliver an optimized experience to library staff and end-users. What then does interoperability mean, and how does this support improved workflows? And how does EBSCO support interoperability throughout its solution suite and third-party applications?

This presentation will focus on the different aspects of interoperability. The presenter will discuss EBSCO's approach to interoperability and the benefits to libraries. Specifically, the presenter will discuss the integration between the different ordering environments – GOBI, ECM and EBSCONET – and the ILS, LSP or other institutional purchasing systems. And finally, the presenter will look at the road ahead for interoperability across the EBSCO suite of products.

Ann-Marie Breaux, EBSCO Information Services

Made From Scratch:
Baking QA and UX into the SFX to EBSCO Migration

This summer, the University of Central Florida Libraries (UCF) migrated from SFX to EBSCO's link resolver, journals list, and knowledge base products - Full Text Finder (FTF), Publication Finder (PF), and Holding Management (HM).

UCF chose an atypical process for establishing our HM knowledge base. Rather than exporting our SFX knowledge base for EBSCO to load into HM for us, we opted to manually activate each package and thoroughly check titles and holdings. This rigorous approach provided us the opportunity to fix errors, remove redundancy, and ensure the accuracy of our new knowledge base. Simultaneously, we revisited some assumptions behind our link resolver menu and examined the user experience it provided in several contexts and situations.

Our approach involved a steep learning curve for the new system, including: a new vocabulary; a layered and complicated admin interface; multiple options and settings for managing links and holdings; the intricate, often confounding, connections between Full-Text-Finder/Holdings Management, Publication Finder, EDS, and EBSCONET; and, of course, documenting our decisions and processes to make the whole process clear and better for our community.

In this presentation we will outline our reasons for the unusual approach, the process of building the knowledge base manually, the challenges we faced and how we addressed them, our decisions about EBSCO managed collections and on-going maintenance plan, UX findings and goals for PFI and FTF, and plans for integration with Sierra ERM and future evolution.
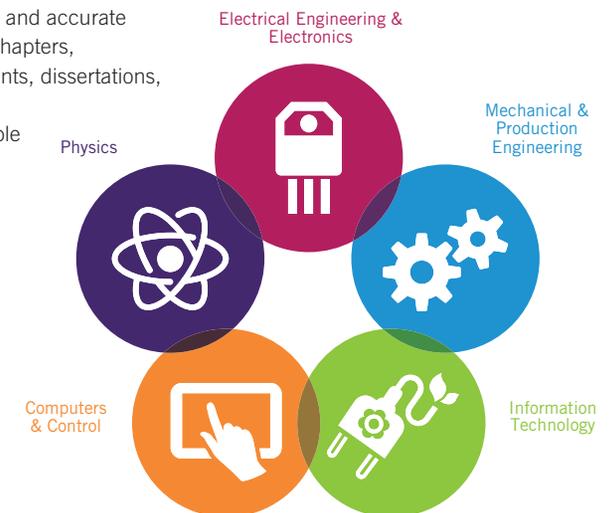
Tina Buck, University of Central Florida
Athena Hoeppner, University of Central Florida

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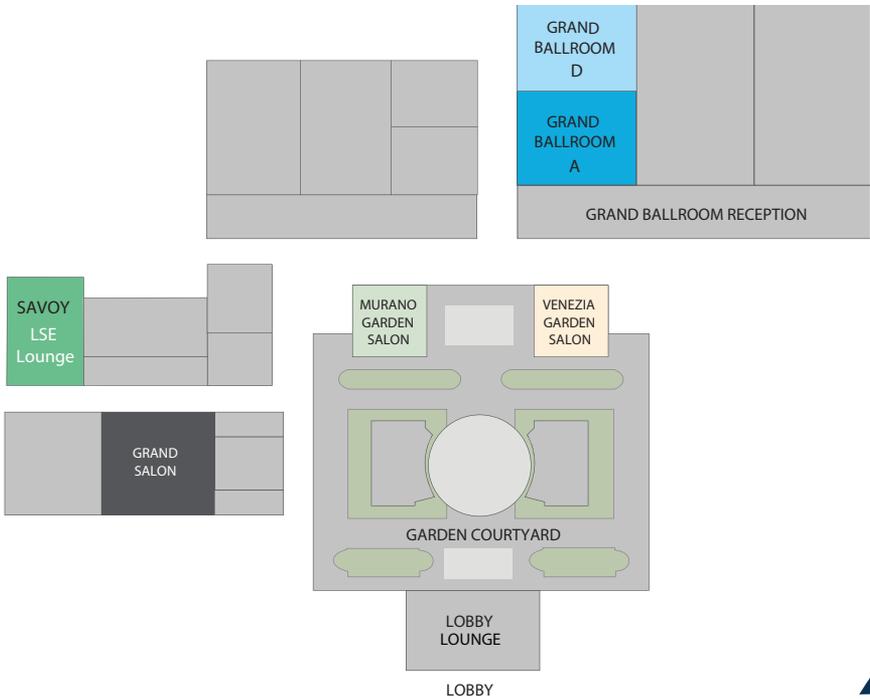
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