AGENDA

EBSCO
USER GROUP
for EDS customers

Boston, MA
May 10-11, 2016

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Agenda
Tuesday, May 10, 2016

EBSCO USER GROUP for EDS customers

7:00 am–9:00 am **Grand Ballroom B**	Breakfast – sponsored by the *APA*
9:00 am–10:00 am **Grand Ballroom A**	User Group Welcome and EBSCO Vision – all attendees Don Gilstrap & Gwen Evans, *EBSCO User Group* Tim Collins & Sam Brooks, *EBSCO Information Services*
10:00 am–10:30 am	Break – sponsored by *IET Inspec*

10:30 am–11:30 am **Grand Ballroom A** One Search to View Them All: Using the EDS API to Provide a Single Searching Experience for Users Drew Parker, *The University of Alabama*	**10:30 am–11:30 am** **Statler** Consortia-ing Out the Details Lauren Fancher, *Galileo* | Theda Schwing, *OhioLINK* | Ellie Collier, *EBSCO Information Services*	**10:30 am–11:30 am** **Arlington, Berkeley, Clarendon** One Size Does Not Fit All: Tuning the Discovery Service to Meet Stakeholder Needs Esther Onega, *University of Virginia* | Kristi Lobrano, *Franklin University* | Eric Frierson, *EBSCO Information Services*
11:30 am–12:30 pm Search Global, Find Local: Integrated Discovery at Indiana University Courtney McDonald, *Indiana University*	**11:30 am–12:30 pm** EBSCO and SirsiDynix Product Integration and Partnership Mike Waugh, *Louisiana State University* | Eric Keith, *SirsiDynix*	**11:30 am–12:30 pm** Website Design and Information Literacy Instruction with EDS Yuliya Lef, *Colorado Mountain College*
12:30 pm–1:30 pm **Grand Ballroom B**	Sponsors Lunch - Hear from our sponsors: *APA & IET Inspec*	
1:30 pm–2:30 pm **Grand Ballroom A** Customizing the EDS Interface to Meet User Needs Bennett Ponsford, *Texas A&M University* | Mike Abrahamson, *EBSCO Information Services*	**1:30 pm–2:30 pm** **Statler** Implementing Encore Duet Michael Monroy, Bill Schickling & Scott McCausland, *Innovative Interfaces Inc.*	**1:30 pm–2:30 pm** **Arlington, Berkeley, Clarendon** Disruptive Discovery: EDS and Beyond Katherine Rose, *Regent's University London*
2:30 pm–3:00 pm	Break – sponsored by *IET Inspec*	
3:00 pm–4:30 pm **Grand Ballroom A**	Library Leaders Discuss Library Technology – all attendees James Mouw, *The University of Chicago* Kristin Antelman, *California Institute of Technology (Caltech)* Curtis Thacker, *Brigham Young University (BYU)* Moderator: Marshall Breeding	
4:30 pm–5:15pm **Grand Ballroom A** Maximizing Management: Getting More out of Your E-Resources Management Strategy Athena Hoeppner, *University of Central Florida* | Roën Janyk, *Okanagan College* | Oliver Pesch, *EBSCO Information Services*	**4:30 pm–5:15pm** **Statler** EDS as OPAC: the Pros and Cons of Retiring Your Legacy Catalog Jeff Karlsen, *Sacramento City College* | Melissa Belvadi, *University of Prince Edward Island* | Ellie Collier, *EBSCO Information Services*	**4:30 pm–5:15pm** **Arlington, Berkeley, Clarendon** Improving Discovery through Collaborative User Testing Joe Deodato, *Rutgers University*
6:30 pm to 8:30 pm **Georgian**	Networking Reception – sponsored by *IET Inspec*	

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10:30 am–11:30 am

One Search to View Them All:
Using the EDS API to Provide a Single Searching Experience for Users: Grand Ballroom A
Drew Parker, *The University of Alabama*

The appeal of a single search box for academic libraries is straightforward: if we can offer students a user-friendly interface and have it search a wide range of library resources, we can potentially help draw students - especially undergraduates - into more substantial engagement with library resources. The University of Alabama Libraries embarked in 2014 on an effort to implement such an interface, with the results from the EBSCO Discovery Service API exposed as articles, books and other media alongside results from other resources. We will discuss some of the challenges we ran into in the process of integrating our single search box with the EDS API. Additionally, we will share usability results and usage statistics that suggest the extent of our success at providing a user-friendly experience that increases resource discoverability.

Consortia-ing Out the Details: Statler
Lauren Fancher, *Galileo* | Theda Schwing, *OhioLINK* | Ellie Collier, *EBSCO Information Services*

Implementing discovery in a consortium environment has its challenges. Each member library, after all, has its own unique content and approach to supporting the research needs of their end-users. At the same time, a consortium requires a centralized implementation and optimized workflows for administrators.

This session will address the challenges and approaches to implementing discovery in a consortium environment. Panelists will discuss how discovery can indeed be centrally deployed while enabling end-users to access the holdings of individual libraries within the consortium. Panelists will also address options for member libraries to define and retain the individuality of its information and services—the data, profiles and branding.

One Size Does Not Fit All: Tuning the Discovery Service to Meet Stakeholder Needs:
Arlington, Berkeley, Clarendon
Esther Onega, *University of Virginia* | Kristi Lobrano, *Franklin University* |
Eric Frierson, *EBSCO Information Services*

More often than not, one size does not fit all. When implementing a discovery service, each institution has its own requirements and different types of users have different needs.

In this session panelists will look at the different configuration and customization options that are available to libraries when implementing a discovery service. Panelists will discuss what libraries can do independently, and where vendor support comes in. Topics include branding, profile options, catalog and IR loading, linking, and website integration.

11:30 am–12:30 pm

Search Global, Find Local: Integrated Discovery at Indiana University: Grand Ballroom A
Courtney McDonald, *Indiana University*

In 2013, Indiana University Libraries launched a Blacklight-powered open-source discovery layer interface for our shared statewide catalog, IUCAT. Since then we've launched a number of enhancements, including integration of EDS results (via the API) in the Bloomington-specific campus view. This session will describe how we balance the need to maintain a consistent user experience across our nine campus system while simultaneously allowing each campus to make choices about how – and even what – additional content platforms are best for their students, faculty and staff.

EBSCO and SirsiDynix Product Integration and Partnership: Statler
Mike Waugh, *Louisiana State University* | Eric Keith, *SirsiDynix*

While the library adoption of discovery services have matured, there are persistent challenges in integrating next-generation discovery with traditional library systems. Recognizing these challenges, vendors and customers on both sides of the problem have aligned and started to move in parallel to offer seamless system interaction and improved user experience. Mike Waugh, Systems Librarian at LSU Libraries, will examine the successes and challenges of their integration of SirsiDynix Symphony and EDS. Eric Keith of SirsiDynix will discuss the partnership between SirsiDynix and EBSCO: its goals, what the key integration looks like and the future roadmap.

Website Design and Information Literacy Instruction with EDS:
Arlington, Berkeley, Clarendon
Yuliya Lef, *Colorado Mountain College*

This presentation will discuss strategies adopted by Colorado Mountain College for using EDS as the focal point for information literacy instruction and website design. By teaching research with EDS, the library is able to scaffold instruction, helping students to perfect their skills and to change their search strategy depending on the topic, discipline, and assignment requirements. The library's website and EDS search forms design reflects and supports the emphasis on Discovery for research and instruction.

1:30 pm–2:30 pm

Customizing the EDS Interface to Meet User Needs: Grand Ballroom A
Bennett Ponsford, *Texas A&M University* | Mike Abrahamson, *EBSCO Information Services*

The TAMU Libraries had already developed a number of add-ons for our catalogs before we selected EDS, including links to library floorplans, to text a call number, and to our very popular "Get It For Me" feature which combines paging available books with interlibrary loan of those that are checked or missing. In order to meet user needs and expectations, EBSCO worked with various teams to add these features to EDS. This included work by Cataloging Specialists to help get all the right data into Discovery from Voyager, Discovery Service Engineers to create the necessary API connectors, apps and UI modifications, and a Discovery Service Coordinator to help facilitate communication between TAMU and EBSCO on a regular basis. The speakers will cover the issues involved in creating the specific apps and customizations necessary, as well as how other EDS customers can get apps and customizations of their own.

Implementing Encore Duet: Statler
Michael Monroy, Bill Schickling & Scott McCausland, *Innovative Interfaces Inc.*

Partnerships offer choice. When partnerships are realized, libraries can choose the solution that works best for them. Through the integration of EDS with Encore from Innovative Interfaces, library patrons enjoy a single environment to explore the entire library's collections - both print and electronic. In this session, presenters will demonstrate and discuss the integration of EDS with Encore, how a new knowledgebase will further enhance the solution, and the benefits for library patrons.

Disruptive Discovery: EDS and Beyond: **Arlington, Berkeley, Clarendon**
Katherine Rose, *Regent's University London*

EDS, and discovery technology in general, is changing our Libraries in interesting and sometimes unintended ways. Discovery services have had a far-reaching impact on diverse areas of the Library (some of which we would not have necessarily assumed it would affect): from information literacy and user engagement to the popularity of open access resources and subscribed resource usage. In other words, discovery technology is disruptive. It has fundamentally changed student information seeking behaviour and expectations, and changed day-to-day Library work and wider strategy. Sometimes these changes are positive, and sometimes less so. In this presentation I'll highlight a few key areas which EDS is disrupting from the perspective of UK academic libraries, drawing on themes which will be explored in the 2016 EDS user group conference, taking place in London in July. I'll also take the opportunity to do a little future-gazing: is discovery technology in its current form what our users want or have students moved beyond it? What's next and how can EDS adapt?

3:00 pm–4:30 pm

Library Leaders Discuss Library Technology: **Grand Ballroom A**
James Mouw, *The University of Chicago* | Kristin Antelman, *California Institute of Technology (Caltech)* | Curtis Thacker, *Brigham Young University (BYU)*
Moderator: Marshall Breeding

What considerations are imperative when selecting software for our libraries? What strategic role does discovery play in libraries today? And what technologies, in fact, best serve end-users and staff across the information management life cycle and beyond?

This panel of industry leaders will discuss key technologies in libraries today. Each panelist will present how discovery serves his or her library's particular goals. Moreover, panelists will take a close look at key technologies that advance the library's mission in support of research and learning outcomes – today and into the future.

4:30 pm–5:15 pm

Maximizing Management:
Getting More out of Your E-Resources Management Strategy: **Grand Ballroom A**
Athena Hoeppner, *University of Central Florida* | Roën Janyk, Okanagan College | Oliver Pesch, *EBSCO Information Services*

Librarians who manage electronic resources will readily testify to the challenges; from managing holdings to setting up linking, there is much to account for. What are the best practices to consider when managing electronic resources? What tools exist and how do they work together? Where, how can, and should, vendors assist by enabling better workflows and interoperability?

Hear how University of Central Florida and Okanagan College are optimizing their e-resources management needs. Topics of discussion will include the evaluation and assessment process, current pain-points in workflows along with opportunities for improving those workflows. Beyond workflow pain-points, panelists will also look at the impact e-resource management has on users, including how e-resources usage information can inform services such as collection development, interface design, and instructional practices.

EDS as OPAC: the Pros and Cons of Retiring Your Legacy Catalog: **Statler**
Jeff Karlsen, *Sacramento City College* | Melissa Belvadi, *University of Prince Edward Island* | Ellie Collier, *EBSCO Information Services*

EDS can be used to create a new search experience for patrons designed to replace your native OPAC. Jeff Karlsen will present on how his 4-college community college district replaced its aging catalog with EDS. Custom scripts and widgets allow integrated course reserves searching, on-screen item requests, college-level branding, automated responses to problem search queries, and enhanced Google Analytics to track user behavior.

Melissa Belvadi will present on how her small university library is also working to replace their OPAC with EDS, but focused specifically on making a separate "profile" from their main EDS search experience.

Ellie Collier will present on working with a Discovery Service Engineer on custom projects and describe some of the widgets already available to enhance the user experience in this specific context. Hear about successes, challenges, and lessons learned.

Improving Discovery through Collaborative User Testing: **Arlington, Berkeley, Clarendon**
Joe Deodato, *Rutgers University*

Implementing a web-scale discovery service can be a complex and challenging task, but the process doesn't simply end once your service goes live. In order to ensure that your service is meeting the needs of its users, your implementation strategy should include a plan for iterative user testing. This presentation offers practical guidance on how to apply insights from user testing to improve your web-scale discovery tool. In particular, it describes the results of collaborative user study conducted by Rutgers University and EBSCO User Research employing a three-pronged approach of local customization, product enhancement, and user education. As such it offers an instructive model for how libraries and vendors can become partners in user research and develop holistic solutions for improving future web-scale discovery offerings.

Join colleagues and friends for the Networking Reception

6:30 pm–8:30 pm

Georgian Room on the Mezzanine
Lively music, food, drinks, and fun

Sponsored by **IET Inspec**

Agenda
Wednesday, May 11, 2016

EBSCO USER GROUP for EDS customers

6:30 am–8:00 am **Grand Ballroom B**	Breakfast	
8:00 am–9:00 am **Grand Ballroom A** Taking Action on Usability Testing Findings: Simmons College Case Study Andrew R. Clark, Jennifer Ferguson, Jeremy B. Shaw-Munderback & Annie Erdmann, *Simmons College* | Khalilah Gambrell, *EBSCO Information Services*	**8:00 am–9:00 am** **Statler** Small Libraries Win the Biggest Vince Mussehl & Nicole Ashman, *Chippewa Valley Technical College*	**8:00 am–10:00 am** **Georgian** Open Source Library Services Platform: Re-thinking the ILS Panel Discussion Sebastian Hammer, *President, Index Data* David Carlson, *Dean of University Libraries, Texas A&M University (OLE member)*
9:00 am–10:00 am Impact of EBSCO Discovery Service on Reference Inquiry Alyssa Koclanes & Kim Copenhaver, *Eckerd College*	**9:00 am–10:00 am** The ABC's of EBSCO Subscriptions and Services at Siena College: an Analysis of *A*ccessibility, *B*udget and *C*ontent Kelly MacWatters & Alison Larsen, *Siena College*	Brendan Gallagher, *CEO, ByWater* Alexander Nietzold, *CEO and Co-founder, TIND* Neil Block, *VP Open Source Innovation, EBSCO Information Services* Moderator: Marshall Breeding
10:00 am–10:30 am	Break – sponsored by *IET Inspec*	
10:30 am–11:30 am **Grand Ballroom A** Engaging Your Users Digitally: Lessons from Psychology and Motivation Dr. Amy Bucher, *Mad*Pow*		**10:30 am–12:30 pm** **Arlington** Open Source LSP Workshop 1 for Strategists, Practitioners and Developers Jacob Jaskov, *The Behaviour Bureau*
11:30 am–12:30 pm **Grand Ballroom A** Library Jargon on the Website: Do Students Speak Your Language? Debra Kolah, *Rice University*	**11:30 am–12:30 pm** **Statler** Take Charge of EDS: Vet Your Content! Jody Fagan & David Gaines, *James Madison University*	**10:30 am–12:30 pm** **Berkeley-Clarendon** Open Source LSP Workshop 2 for Strategists, Practitioners and Developers Filip Jakobsen, *The Behaviour Bureau* **10:30 am–12:30 pm** **Georgian** Open Source LSP Discussing the Future of Library Technology Mike Winkler, OLE | Neil Block, *EBSCO Information Services*
12:30 pm–1:30 pm **Grand Ballroom B**	Lunch	
1:30 pm–3:00pm **Grand Ballroom A**	**What, Where, How and Why?** Features, Functionality, and Forthcoming Innovations that Support Library Research Today and in the Future – all attendees Clive Wright, *EBSCO Information Services*	
3:00 pm	Meeting concludes *for all attendees except User Group Board members*	

8:00 am–9:00 am

Taking Action on Usability Testing Findings: Simmons College Case Study: **Grand Ballroom A**
Andrew R. Clark, Jennifer Ferguson, Jeremy B. Shaw-Munderback & Annie Erdmann, *Simmons College* | Khalilah Gambrell, *EBSCO Information Services*

In April 2015, Simmons College and EBSCO User Research conducted in-person and remote usability testing to:

• Observe users' motivations and expectations for selecting full text links
• Learn when students use Interlibrary Loan and their opinions

This session will discuss: team's findings, actions taken and progress, and the value of usability testing in understanding users.

Small Libraries Win the Biggest: **Statler**
Vince Mussehl & Nicole Ashman, *Chippewa Valley Technical College*

Learn how a small technical/community college Library won big by using EDS. Chippewa Valley Technical College in Eau Claire, Wisconsin has a relatively small Library. In fact, it is the leanest staffed library in the Wisconsin technical college system. Discover how EDS has changed how the Library functions with a staff of only two librarians and how it has changed their process of cataloging, reference, instruction, and digital learning in general. Was EDS worth the work? Was EDS worth the money? We think so, join us to learn how and why!

9:00 am–10:00 am

Impact of EBSCO Discovery Service on Reference Inquiry: **Grand Ballroom A**
Alyssa Koclanes & Kim Copenhaver, *Eckerd College*

Learn how the implementation of EBSCO Discovery Service (EDS) shifted the level of reference inquiry at a small liberal arts college library. The purpose of this study was to examine shifts in the volume and complexity of reference questions received both before and after integration of EDS. Research findings may be utilized to support evidenced based redesign of reference services aligning library staff, services and collections with user behavior.

The Warner model of reference classification was utilized to review and classify reference questions from one academic year prior to the implementation of EDS and one academic year following EDS implementation to evaluate the percent change in question volume, and degree of question complexity as defined by Warner. Research findings were significant as they revealed a 34% decline in overall reference activity following EDS integration into the research process, 45% decline in Level 1: nonresource-based questions, but a notable 19% increase in higher level inquiry or consultation type reference transactions. Libraries preparing for implementation of EDS or a redesign of reference services post EDS implementation would benefit from the findings of this study.

The ABC's of EBSCO Subscriptions and Services at Siena College: an Analysis of *A*ccessibility, *B*udget and *C*ontent: **Statler**
Kelly MacWatters & Alison Larsen, *Siena College*

Join us for a discussion of our EDS journey at The Standish Library. Topics will include the selection process, implementation, EBSCO link resolver, A-Z migrations, and an evaluation of budget and collections.

10:30 am–11:30 am

Engaging Your Users Digitally: Lessons from Psychology and Motivation: **Grand Ballroom A**
Dr. Amy Bucher, *Mad*Pow*

Digital technology offers many benefits for our users, but unless we can engage people in the technology, the benefits don't matter. Learn why engagement is so critical with digital tools, and how to leverage the psychology of motivation to craft a digital experience that will hook your users. This talk will include theoretical background on motivation as well as examples of digital tools that bring the theory to life.

11:30 am–12:30 pm

Library Jargon on the Website: Do Students Speak Your Language?: **Grand Ballroom A**
Debra Kolah, *Rice University*

Library jargon can be a barrier to success on the library website. Libraries can be especially confusing because there are the services of the "building" and the services of the "internet." Fondren Library at Rice University plays a large role in the community, assisting with government and business research and community archiving needs, and there are many services listed on the website that some users (especially students) may not need to use.

In 2015, Fondren's resource-focused website was redesigned into a user-centered site, and determining appropriate jargon for library users was one of the biggest challenges. The new Fondren website is highly responsive, and has resources and materials that users frequently search for clearly visible at the top-level of the site. Another important aspect of the redesign was to reduce the total number of pages, by migrating pages that were solely for librarian use, to a wiki instead. With a reduction to the overall volume of the site, Fondren users can now experience a more streamlined path to the content they seek.

To make these changes to the library website, Fondren UX Library staff utilized micro-feedback, surveys, guerrilla testing, focus groups, and one-on-one user sessions to understand which library terms users understood, and which terms left them feeling confused and overwhelmed. Join me for a presentation of findings about changes in word choices, descriptions, and navigation – and the stories behind them.

Take Charge of EDS: Vet Your Content!: **Statler**
Jody Fagan & David Gaines, *James Madison University*

Just because you can automatically enable all content in EBSCO Discovery Service (EDS) doesn't mean you should! Learn how a large academic library selects which metadata to include in EBSCO Discovery! We will cover

• Our discovery mission statement and metadata selection policy and procedures
• Examples of problematic metadata issues, and issues stemming from problematic metadata
• Comparisons of searches with and without metadata selection
• Notes on many of the metadata sources currently available to EDS customers

We welcome additional perspectives and we plan to conduct a few "audience polls" to guide parts of our presentation.

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8:00 am–10:00 am

Open Source Library Services Platform: Re-thinking the ILS Panel Discussion: Georgian

This panel of industry leaders will discuss a new collaboration to develop an open source library services platform. There is much at stake as libraries look to extend into new areas of relevance, attain cost savings, and reduce single-vendor dependency. How then should a new library platform come into fruition? Panelists will look at the principles of a new platform: open source, supported, modern, modular, and community-based. And they will discuss the effort that is well underway to deconstruct legacy systems and construct a new, open environment that is ripe for ongoing innovation.

Sebastian Hammer, *President, Index Data*

David Carlson, *Dean of University Libraries, Texas A&M University (OLE member)*

Brendan Gallagher, *CEO, ByWater*

Alexander Nietzold, *CEO and Co-founder, TIND*

Neil Block, *Vice President Open Source Innovation, EBSCO Information Services*

Moderator: Marshall Breeding

10:30 am–12:30 pm

Open Source LSP Workshop 1 & 2 for Strategists, Practitioners and Developers: Arlington and Berkeley, Clarendon

ILS have traditionally been designed as monolithic software packages and have not always proven to be very flexible for users or developers. We are now in a period when the role of libraries is quickly evolving in many directions, and this raises the question – what should a new library platform look like? As a new open source library platform is developed from the ground up, one of the project goals is to rethink workflows. Another is to allow mixing and matching of modules, for example, combining a reporting module and an acquisition module developed by different groups or vendors. And yet another goal is to ensure lower cost of ownership for libraries. Finally we also want to consider new functions for libraries of the future.

Facilitated by The Behaviour Bureau, join one of two concurrent workshops to contribute your thoughts and priorities for the next thing underway in library technology today. The workshops will be highly interactive. First we will present our preliminary view on the challenges and future opportunities within library systems (based on initial user research and analysis). Then we'll ask you to help us prioritize and discuss. Your input will feed directly into our learning process. You will be invited to follow how we use the insights and participate in our learning journey.
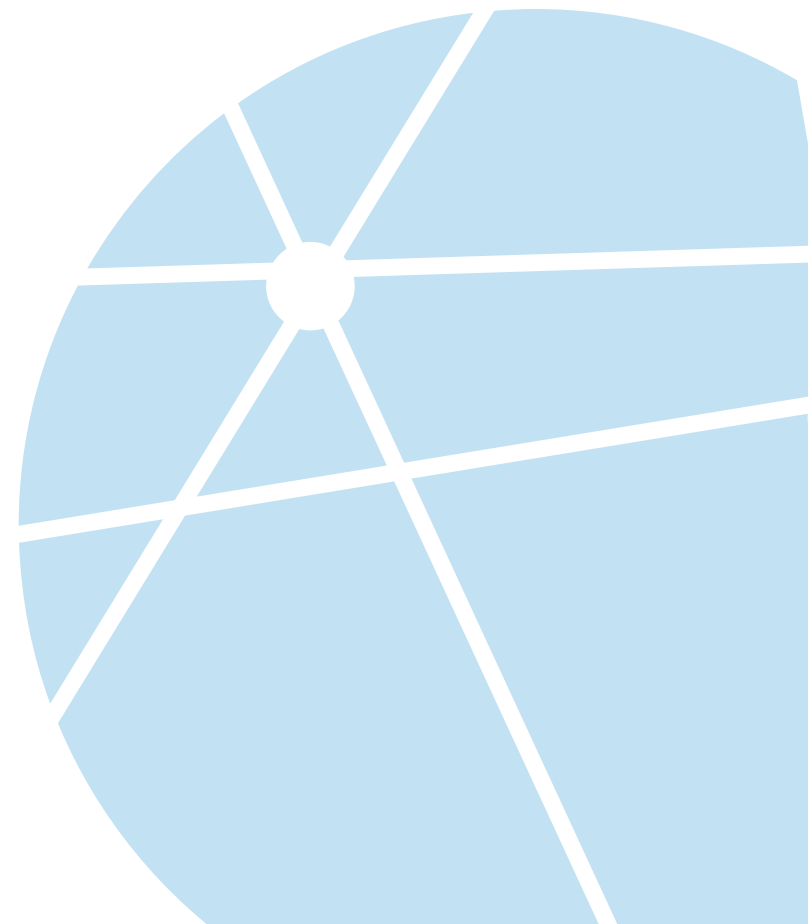
Facilitators: Jacob Jaskov and Filip Jakobsen, both of *The Behaviour Bureau*

Open Source LSP Discussing the Future of Library Technology: Georgian

Q&A with Mike Winkler and Neil Block

The development of a new open source library services platform is a community initiative that is bound to fundamentally change the nature of library-vendor collaboration. In an industry ripe for real technology innovation, libraries of any size will enjoy a choice of applications - from vendors and libraries alike - that best meet workflow needs, support end-user requirements, and extend into vastly new areas.

Join this Q&A with Mike Winkler, Managing Director of OLE, and Neil Block from EBSCO for an in-depth overview and discussion of the open source library services platform project. Mike and Neil will share the project vision and will solicit your input on your library's priorities and strategic direction.

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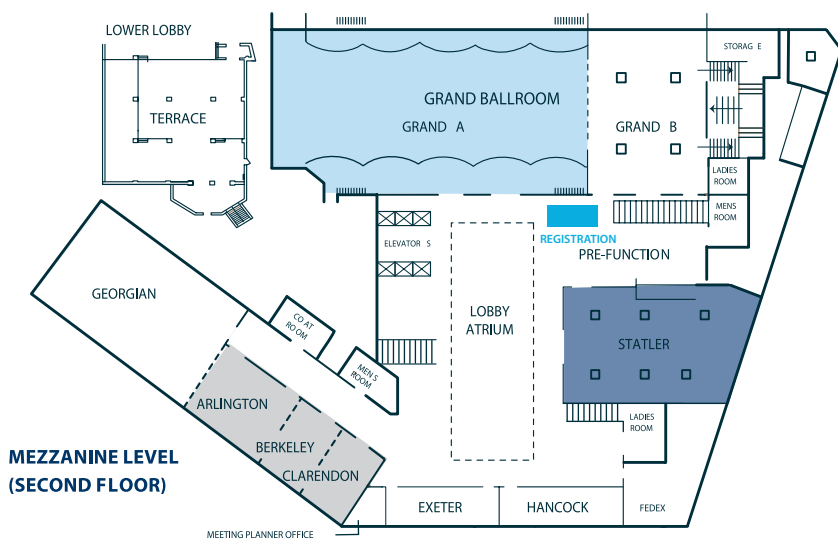- Mechanical and production engineering

For more information on Inspec and to request a free trial on the EBSCO*host* platform, please visit:

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All User Group sessions and events will occur on the Mezzanine level.

LOWER LOBBY

TERRACE

GRAND BALLROOM
GRAND A
GRAND B

STORAGE

LADIES ROOM

MENS ROOM

ELEVATORS

REGISTRATION
PRE-FUNCTION

GEORGIAN

COAT ROOM

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STATLER

ARLINGTON

BERKELEY

CLARENDON

**MEZZANINE LEVEL
(SECOND FLOOR)**

LADIES ROOM

MEETING PLANNER OFFICE

EXETER

HANCOCK

FEDEX

The EBSCO User Group Board of Directors is made up of libraries currently using EDS and interested in fostering relationships with other EDS users.

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