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Encore EDS Task Force Final Summary Report (6.4.14)

HELIN Consortium. Encore/EDS Task Force

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FINAL SUMMARY REPORT

encore/eds task force

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ENCORE/EDS TASK FORCE
Final Summary Report
June 2014

OVERVIEW & SUMMARY RECOMMENDATION

In February 2014, the Encore EDS Task Force was formed to test and evaluate the Encore/EDS Discovery platform integration using the Johnson & Wales and Providence College trials. The effectiveness and ease of use of the EBSCO A to Z with LinkSource products and the EBSCO Administration Module were also evaluated. A copy of the task force charge is provided in Appendix 1. The following summary report is based on the premise that III's Sierra will continue to be the HELIN ILS for at least the coming year, 2014-2015.

In response to the HELIN goals outlined in our charge, the task force recognizes that HELIN must provide a one-search option for its users that optimizes the discovery and utilization of library resources and services. Although discovery products lack the precision of subject and title indexing provided by the classic catalog and native databases, they do provide an excellent starting place for the novice user. Equally important, moving to a discovery service positions HELIN to move toward the future of cataloging and access, which will not be MARC-based. In keeping with our charge, the task force evaluated only the EncoreEDS product (which was renamed "Encore Duet" by III during the trial) and did not compare it with other discovery platforms, such as Summon or Primo, or seek solutions beyond the scope of our charge.

After careful consideration, trial and evaluation, the task force reached consensus that HELIN should move forward in switching from Serials Solutions to EBSCO's A-Z with LinkSource product for 2014-2015. This will allow each HELIN library to decide for themselves whether to start using Encore Duet immediately, or to hold off until upcoming enhancements become available. In order to be ready for the beginning of the 2014 fall semester, the task force recommends that the transition to EBSCO A to Z with Linksource be made as soon as possible and that the HELIN Board and Central Office communicate a timeline for implementation of EBSCO A to Z with Linksource and Encore Duet to the HELIN Libraries. This recommendation comes with the understanding that it is impossible to sustain two separate knowledge bases in the HELIN database. It also comes with an understanding that some HELIN libraries have a definite preference for the EDS skin, or for other functionality and usability features such as drop-down menus, which are not yet part of Encore Duet. Moving to the EDS skin will require that APIs become more fully realized and cost an additional \$4000 per institution. This amount could be subsidized by any savings realized by the switch from Serial Solutions to EBSCO AtoZ with LinkSource. ***We recommend that HELIN continue to explore the option of moving to the EDS skin for those wishing to move in this direction.***

The current situation regarding e-resources in the HELIN database is not sustainable for the following reasons:

- The rate at which we are adding new e-resources to our shared catalog is increasing.
- Accurate representation of each school's e-resources is growing more complex.
- MARC representation of e-resource records is currently achieved through a labor-intensive and time-consuming manual process. Because of this, records can only be loaded once every 30 days at best.
- There are so many records involved with this process that the dataset as delivered by the vendor is often inaccurate, sometimes requiring information to be removed and re-added to the catalog several times.
- The future of cataloging leads away from MARC. We need to position ourselves to stop relying exclusively on MARC.

The Knowledge Base – A to Z with LinkSource:

The HELIN Consortium's adoption of Encore Duet requires migration of our Knowledge Base from the current Serials Solutions product to EBSCO's A to Z with LinkSource. We feel this effort will prove worthwhile, as staff and patrons will benefit in the following ways:

- The knowledge base and holdings will be updated in real time with very little lag time. We have been told time ranges from 30 minutes to overnight.
- No more SerSol batch uploads to the catalog that are both a huge time drain and more importantly are incomplete because many titles in packages have no MARC record representation. For any individual library, between 10% and 70% of their electronic titles are not in the catalog at all.
- Each HELIN member will have control over behavior of their display of e-resources via EBSCO Admin. Patrons of each school will ONLY see that school's e-resource data.

Note: Although patrons can benefit by seeing only the items for which their school has access, there are occasions when viewing another school's e-resources is necessary. For example, a patron of one library may want to read an e-resource that is held by another HELIN library by traveling to that library and reading it there. Both EBSCO and III were made aware that we need such a tool, and they are looking into ways to satisfy it. To work around this issue in the near term, each HELIN library's A-to-Z list could be added to the HELIN website, enabling librarians to search the different lists and direct a patron to the library which has access to the title they need.

- Individual libraries will be able to enable DDA (demand-driven acquisitions) titles in their EDS profile for discovery. This is something HELIN has been unable to do using shared MARC records (unless all libraries opted to select the same DDA vendor).

It must be noted that four HELIN Libraries currently rely on the Classic Catalog, ("WebPac Pro"), as their primary public interface because it offers the capability for subject and title indexing that Encore does not. For these libraries, the removal of Serials Solutions records from the catalog will result in a loss of content. This is because only the Encore interface will display the integrated EDS e-content that is not cataloged. The only records that will show up in WebPac Pro are those represented by MARC records in Sierra - whether they

are print or electronic. WebPac Pro users will have the option to search the EDS interface without catalog content separately or purchase the EDS skin interface with all catalog and EDS content combined once the APIs are fully developed this year.

The current consensus among HELIN members is that only records for owned content would remain in Sierra. Records previously loaded monthly from Serials Solutions for subscribed content would eventually be removed. Since HELIN Central could not remove all records right away, there would be a transition period where some records would remain. This gives us time to allow the vendors to make progress in resolving some of the issues that the Task Force has identified, and which the vendors have agreed need to be changed, without impacting patron access to content. HELIN Central is also willing to continue to load MARC records into the HELIN catalog for ebrary until EBSCO has a metadata agreement with ProQuest for this database.

Schools might decide to keep subscribed records for some period of time. HELIN Central would need to delete the 856 fields from e-journal records because they point to the SerSol A to Z list for each school, not to the e-journals themselves, and will no longer work when libraries no longer subscribe to SerSol 360 core. However, the links directly to the journals live in the ERM coverage database and will continue to display to the public in the catalog.

The Discovery Platform:

In evaluating this discovery platform, the task force has made functionality and usability recommendations to both Innovative and EBSCO. It is essential that a HELIN Discovery Platform Working Group be created to continue to work with III and EBSCO to ensure that these recommendations are developed in future Encore releases. Necessary development enhancements determined by the task force are:

- The normalization and mapping of EDS and Encore of format facets.
- The ability to use check-off boxes (instead of open/close links) in order to select more than one facet choice simultaneously.
- A cleaner interface that makes facets and the results list easier to use and navigate – drawing on features currently available in the EDS skin.
- Book location and availability should be more readily apparent from the initial results screen.
- Increased Advanced Search functionality including limiters and expanders that allow for accurate field searching, limiting by library location, source type and date for both Encore and EDS results.
- Clear login instructions from the initial results screen for off-campus users.
- Numbered results for easier navigation.
- Functionality of the pop-up box scroll navigation. When clicking on more you get the pop-up but cannot navigate the scroll bar to read all the information provided.

As we work through the implementation of Encore Duet, the task force recommends that a Discovery Working Group be created for 2014-2015. There are several decisions that must be jointly agreed upon as we move forward. These include:

- Should purchased e-content be cataloged or maintained in EBSCO's LinkSource?
- Naming conventions for tabs and facets
- Ordering and mapping of facets
- Making further recommendations to the development of this discovery tool.
- Extending our evaluation to other discovery options as this landscape continues to evolve.

In making our recommendation to subscribe to EBSCO LinkSource, EBSCO A-Z, and Encore Duet for 2014-2015, the task force wishes to make the following options clear to all member libraries. These options are not mutually exclusive, and each library may change from one to the other at any time, and even offer different options for different audiences. In offering access to each of these options, the task force recommends that the HELIN home page have the Encore Duet search as its default search box and include links to WebPac Pro index searches and Catalog only searching in Encore.

Option 1: Use the integrated Encore/EDS interface as a one search option combining the catalog and EBSCO Discovery. Individual libraries can tailor their home pages to default to either Encore – the Catalog OR Catalog Plus – Encore/EDS combined. Access to native databases is always available from library home pages and people may prefer to use this access for instruction and reference.

Option 2: Continue to use WebPac Pro without Serials Solutions records and use the EDS Discovery Platform for database and e-content discoverability. Library home pages will need to have two separate links – one for WebPac Pro for searching primarily books and other cataloged resources (including cataloged e-resources and government documents) AND one for access to article database content, e-content packages, and non-cataloged e-resources in EDS.

Option 3: Continue to use WebPac Pro without Serials Solutions records and continue to use native databases with the EBSCO link resolver and Knowledge Base. This option will **not** allow you to search subscription e-book packages in the catalog (the records currently downloaded from S.S.) and will not give you access to any article content outside of individual database/vendor links.

Option 4: Once the Sierra APIs are ready to allow for catalog integration within EDS, HELIN libraries will have the option to use the EDS interface instead of the Encore interface. The additional cost to have the EDS skin with the catalog has been quoted to be \$4000. (Note: at IUG, it was suggested that the current Sierra API for harvesting catalog content is only robust enough to handle updates. There may need to be a one-time HELIN catalog load into EDS for this option.)

TASK FORCE WORKFLOW

During the course of the trial period, the Task Force met five times in 2014 -- February 26, March 11, April 3, April 24, and May 14.

In order to structure our testing and evaluation, a Review Matrix was established as a Google Doc. The Matrix can be found in Appendix 2 of this report and can be accessed at http://bit.ly/HELIN_EDS. As task force members tested the product they noted problems, questions, concerns, and observations. For each item listed, the task force co-chairs sought information from EBSCO and III and recorded conclusions or actions to be taken. At each meeting, items in the review matrix were discussed to inform this report and to make recommendations to EBSCO and III for enhancement.

Two webinars concerning EBSCO Admin and EBSCO A to Z with LinkSource were delivered by Kathy Kiely at EBSCO. Ed Roche attended the April 24th meeting to address task force questions and respond to concerns. In May, Susan McMullen, Julie Kliever (virtually), Bob Aspri, Martha Sanders and Ruth Souto met with Amy Bentz, Chris Holly, Neil Block, Laurie Shedrick and III executives at the IUG Annual Meeting in Detroit. The purpose of this meeting was to address usability issues with the Encore skin, discuss the mapping and normalization of format facets, advanced search functionality, and related issues concerning functionality. Bob and Sue also attended a session on Sierra APIs to learn more about the developing Sierra APIs that allow the Sierra database to work with Discovery partners. At our May 14th meeting, representatives from EBSCO (Neil Block, Harry Kaplanian, Amy Thurlow and Terry Walsh) and representatives from III (Amy Bentz and Laurie Shedrick) were available to answer and respond to questions and issues identified by the task force.

EVALUATION & FINDINGS FOR EBSCO ADMIN & LINKSOURCE

Trial Setup:

Two HELIN member schools were selected to host trial instances of Encore Duet: Providence College and Johnson & Wales University. Individuals at each school were designated to be trial coordinators – Julie Kliever for Providence College, and Sue Reynolds for Johnson and Wales. In October of 2013, both schools were asked to fill out questionnaires indicating which online resources they owned, and Martha Rice Sanders of HELIN Central was asked to export each school's Serials Solutions content. EBSCO then used this data to preconfigure the administrative tools used to configure the back-end (EDS) portions of the product: A to Z with LinkSource, and EBSCOAdmin. III then

configured the Encore server to harvest EDS content and display it via a separate Encore URL: <http://encore.uri.edu/iii/encoreEDS/?lang=eng>.

During the trial, HELIN Encore/EDS Task Force members were given access to both of the above administrative tools through Providence College's logins. Members were encouraged to log in to look at the admin interfaces, to get a feel for using them.

A to Z with LinkSource:

Beginning December 2013, both schools began participating in EBSCO trainings using A to Z with LinkSource. This is the Knowledge Base administrative tool which would replace Serials Solutions. An EBSCO "Discovery Coordinator" (Heather Smith) was assigned, and both schools were given access to EBSCO EDS Support Site <http://support.ebsco.com/eds/>. Both schools participated in separate WebEx trainings. However, both schools were told that the functionality in LinkSource would be migrating into EBSCOAdmin at some point in the future, and that because of this, it was not necessary to extensively learn how to use it, and that EBSCO support staff could make changes on our behalf. This forced both schools to rely more on email exchanges with EBSCO support for modifications, rather than time spent actively learning the interface. Despite this, there was still a steep learning curve needed to understand the product. In addition to using it to maintain each school's Knowledge Collection database, it includes customization of resources links, called "Custom Links", which allow customized URLs to display on the patron LinkSource page. Since similar CustomLinks, which are displayed on the results list page, are duplicated in EBSCOAdmin, this proved to be an ongoing source of confusion. The migration of this functionality into EBSCOAdmin should help reduce confusion, but it was not possible to evaluate the migrated product for this trial. There is also a site customization and branding portion of the product, where each school can tailor their own wording of CustomLink buttons. Again, both pilot libraries were told not to spend time learning to use the interface, but instead to ask EBSCO to make changes on their behalf, which both schools did.

EBSCOAdmin:

The heart of Encore Duet's flexibility and customizability resides in the profiles set up in EBSCOAdmin. Each school will be able to control settings for their own patrons who use the discovery interface. Since Encore Duet is a hybrid product, two profiles are used: an EBSCO Discovery Service profile (which defines the base EDS engine), and an ENCORE API profile (which routes data to the Encore interface). While both need to be maintained, most of the changes take place in the ENCORE API profile, called WSAPI. Both schools participated in separate on-site training sessions for EBSCOAdmin with EBSCO trainer Kathy Kiely in early February. Kathy emphasized that the same on-site trainings would be offered for each future HELIN participant. Kathy also made herself available for one-on-one WebEx trainings.

EBSCOAdmin is configured for Encore Duet using a subset of 4 admin tabs:

- Searching: Used to configure and control Boolean search options, term proximity, default settings on results, and control over searching document metadata vs. full text.

- Databases: Used to select/deselect which owned resources are searched.
- Viewing Results: Controls how results are displayed to the user (number of results per page).
- Linking: Used to configure custom links, which are displayed on results page. Custom links allow the patron to navigate directly to a full text resource from a result listing. The order of links can be ranked, allowing a school to show custom link buttons in a preferred order. Custom links are tailored using query strings, which parse the metadata retrieved from the search, and use it to customize the buttons available on each result and on the “Detailed results” page. Since query strings are written using cryptic parameters, EBSCO advises their EDS customers to email them with instructions on how they would like each custom link to behave, rather than trying to modify links for themselves. A custom link can also set up as a one-click option to direct a user to an ILL form if EncoreDuet determines that the item is not available as full text.

Each school will need to work closely with EBSCO to configure their results lists.

Issues requiring immediate attention:

EBSCOAdmin is used to configure and maintain the EDS search engine and the EDS skin. The Encore interface lies on top of EDS, resulting in a hybrid product from two different vendors. When configuration problems and questions arose, there were times when the two active trial participant coordinators either did not know which vendor they should ask, or were shuttled back and forth between EBSCO and III support as they sought answers. Examples of this include an issue where Encore EDS hangs without resolving facets, as well as an issue where EBSCO is unsure of how the “ebook” custom link is generated for the Encore skin. We suggest that the EBSCO Discovery Coordinator who is assigned to the account also include a counterpart at III, to avoid making the customer negotiate between the two vendors.

The EDS Support Site does not contain documentation or troubleshooting sections specifically for Encore Duet customers. Since discrepancies exist between the options available to configure EDS and those available to configure Encore Duet, some of the documents and video tutorials on the support site are misleading and confusing, as customers end up seeing information that does not pertain to their installation. The inclusion of a support section containing Encore Duet-specific information and tutorials would prove extremely helpful.

EBSCOAdmin configuration screens are supposed to be dynamically updated, meaning that any changes made and saved should be reflected in the patron results screen immediately. Testing during the trial period has shown this not to be the case. We originally assumed this problem was related to the way the trial is set up. Very late in the trial, we were told by III that some configuration changes to Encore Duet require Encore to be restarted (an automatic overnight process) in order to take effect.

EVALUATION & FINDINGS FOR ENCORE/EDS (Encore Duet)

Integration:

The Encore/EDS product, which is now called Encore Duet, works differently from other discovery solutions. Products like Summon and EDS harvest the library catalog and return results back to the user from a unified database of catalog holdings and other database providers & publishers. With Encore Duet, Encore harvests the content in EDS. They seem to be working in tandem to create an "interfiling" of results from EDS and from the catalog. The facets in this product are very important for narrowing a user's search by format type, location, availability, provider, publisher etc. Much of the work of the task force has involved working with both EBSCO and III to map and normalize the source/format types in the format facet so that users are not presented with duplicate source types -- one in CAPS coming from Encore and one in lowercase coming from EBSCO. Formats come from the metadata of indexed entries in EDS and from the material type in the MARC record for Encore. The combined EDS and Encore format facet is currently a jumble of format types with many redundant names that are confusing for the user. For example, the terms "Books", "Ebooks", "BOOKS, etc"., and "E-BOOK" are format types that can all be listed as format facets from a single search. "Books" and "Ebooks" (EBSCO metadata terms) were really both ebooks, so eventually we were able to map these terms, along with the Encore material type "E-BOOK" to a single format type labeled "Ebooks". This was also the case with "ONLINE VIDEO", E-VIDEO (Encore terms) and Videos (EBSCO term) – they were all mapped to "Online Video".

In addition to recommending the proper mapping and normalization of format types in the format facet, the task force made the following facet modification recommendations to Encore & EBSCO:

- Facet selections should have checkboxes instead of the open/close selection now being used.
- Users should be able to make multiple selections in any single facet via a checkbox.
- Facets should be condensed and re-ordered.
- Facets area should be more understandable and less cluttered.

Searching & Results:

The one-search bar appears to work as designed. Users benefit from typing in keywords as they would in a web search engine. Usability testing showed that most users search author's first name, last name and look for topics in a string of words. Results are interfiled using both Encore's and EBSCO relevancy ranking algorithms as described below. The user

can then limit their search by a number of facets including limiting by catalog or EDS content, location, format type, date, publisher, journal, content provider, etc. The only way to modify an existing search is by choosing to limit by facet.

The task force has found the Advanced Search in need of further development. Currently it appears to only be working as an Encore Advanced Search and is not using any limiters or expanders for EDS content. As noted above, increased Advanced Search functionality including limiters and expanders that allow for accurate field searching, limiting by library location, source type and date for both Encore and EDS results have been suggested to the Encore Duet development team. At IUG, it was announced that some limiters and expanders are now available for searching EDS content with Encore release 4.4.

Relevancy Ranking:

In examining search results it became evident that Encore and EDS were not operating in true discovery platform integration but rather co-existing and presenting interfiled results with two separate relevancy ranking algorithms. Encore's relevancy is based on words in titles and EBSCO's is based on subject headings from controlled vocabularies. III explained that EDS results have relevance among themselves, and the catalog results are relevance-ranked using Encore's Right Result algorithm. Encore shuffles these two relevance-ranked result sets together to ensure you will see some articles and some catalog records on each page. Although it seemed strange that results would be interfiled based on two different relevancy algorithms, the combined results list does appear to provide relevant results. One product is not being made to conform to the other so you get catalog results as you would normally get them ranked in Encore and database results as you would normally have them ranked in EBSCO databases. A comparison of native database search results with Encore Duet search results showed that the results were relevant, though they are not always the same and are ranked differently.

Comparison with Native Databases with EDS:

Task force members compared results against native databases. When comparing EDS results against those in a native EBSCO vended database the ranking and number of results were almost identical. However, we did see a difference in the number and ranking of results when compared to that same database in ProQuest. We assumed that this is because ProQuest uses different a relevancy algorithm than EBSCO.

Example: searched *Amelie Nothomb* in EBSCO's *MLA* and found results were the same in the native database and EDS. This same search in ProQuest *MLA* produced one additional result and displayed them in different relevancy order.

However, results became quite a bit different when comparing ProQuest native databases against EDS, especially when searching specific content that EBSCO did not have publisher agreements for. It was noted that the more specific the search was in relying on journals in the native database for which EBSCO did not have publisher agreements, the less relevant the results. A search of *neo-dada and Japan* in *Art Bibliographies Modern* retrieved 12 scholarly articles in that native database and none in EDS.

Comparison of Biological Sciences & EDS: Both the JWU and PC trials were searched because JWU has Biological Sciences and PC does not subscribe to this database. The results from each trial were very similar, not showing any preference (actually less results returned from JWU– for which *Biological Sciences* is checked off in their EBSCO Admin).

Search terms: DNA Barcoding and Rhodophyta

- 32 results in ProQuest’s Biological Sciences
- 18 Results in JWU EDS
- 23 Results in PC EDS

The ranking of results and actual results differed considerably between the native database and EDS. Of the 32 results found in ProQuest, only 15 were found in EDS. Results not found were from these journals – all of which are important journals for this research.

- *Journal of Applied Phycology*
- *Cryptogamie Algologie*
- *Phycologia*
- *Methods in Molecular Biology*
- *European Journal of Phycology*
- *Applied Microbiology and Biotechnology*
- *Biological Invasions*

Additionally, 2 results were found in PC’s trial but not JWUs and 1 result was in JWU trial and not PC’s. Duplicates (two at the most) were found in all results lists. Six results were returned in EDS results but not in ProQuest’s results. Results returned from dissertations or conference proceedings also do not show up in the EDS results list. Although the results returned in EDS were not irrelevant, they did not contain some of the major articles and journals for this research. Researchers must use the native database for the best results on this research topic.

Another search shows that the comparison between EDS and ProQuest native databases results is highly dependent on the research being conducted. A search on *Endangered Birds of Prey and Diet* actually found more relevant results in EDS.

- 74 Results in ProQuest’s Biological Sciences
- 103 Results in Encore EDS – JWU
- 90 results in Encore EDS - PC

Again there was not much difference in PC and JWU EDS results. Two found in the top 10 at JWU were not on the PC list. However from this search we found 7 out of the first 10 hits in ProQuest’s Biological Sciences were relevant (70%) and 8 out of the first 10 hits in EDS (80%) were relevant. Again a totally different set of results, but in this case it seemed EDS had more relevant hits.

When comparing results in ABI and EDS, we initially thought that the results would be more similar because EBSCO has publisher agreements with most of the journal publishers indexed by ABI. However this was not the case. A search on *Corporate Social Responsibility and Brand Image* retrieved 384 Results in ProQuest ABI (130 Scholarly) and 768 in EDS

(395 Academic & 142 in *Business Source Complete*). Although relevant results were retrieved by both, only one *ABI* hit was returned in the top 25 EDS results list.

Note: If a journal article indexed in a ProQuest database is available via full text in another platform or directly from the publisher, the EBSCO link resolver links to that content efficiently.

From the searches outlined above it is imperative that EBSCO and other Discovery Platform Vendors share their metadata. In April 2014, EBSCO issued a *Policy for Metadata Sharing & Collaboration with Discover Service Vendors* in which they announced an open policy around metadata sharing. Hopefully negotiations with other vendors will be successful since open sharing of metadata will benefit all users.

Interface Usability:

As noted above, Task Force members did some informal usability testing to test the user interface. Seventeen surveys from various institutions were gathered. The compiled results can be found in Appendix 3 of this report. The most notable issue concerned the location & functionality of the facet column – including users not seeing it, being overwhelmed by the choices offered, duplicate facet choices, and confusion over the open/close facet link function. Other issues included difficulty in locating book location from the *see all* link, not understanding naming conventions, i.e. *Catalog* and *Catalog Plus* and confusion over the functionality of the Advanced Search option.

These usability issues and others have been submitted to the Encore Duet Development Team.

CONCLUSION:

The curation of metadata for Library resources is undergoing a rapid change. As subscription electronic resources take up a larger percentage of our collection, the HELIN consortium cannot ignore the need to replace static MARC records with a more dynamic discovery service. But just as importantly, the consortium needs to leverage the rich resource that is our shared catalog. Migrating to Encore Duet allows us to maintain and share the resources we own while also allowing each school to offer their own customized discovery platform, which will continue to mature and expand.

As discovery platforms and their integration with catalog interfaces continue to develop, it is important that we continue to evaluate all products available in order to provide users with the best search tool for discovery catalog and e-resource content. As its final recommendation, the task force recommends that Encore Duet be evaluated again after libraries have been using it for one year. If issues identified in this report have not been resolved at that point, HELIN should evaluate and seek alternative solutions.

APPENDIX 1
Encore/EDS Task Force Charge

The Encore/EDS Task Force will report to the HELIN Executive Director on the following “Charges”:

1. Test and evaluate the results of the Encore/EDS integration using the Johnson & Wales University and Providence College trials.
2. Test and evaluate the results and ease of use of EBSCO’s A to Z and EBSCO’s LinkSource Products
3. Test and evaluate the effectiveness and ease of use of the EBSCO A to Z Administration Module
4. Determine if there are changes that need to be made to Encore to make it function better in a consortium environment.
5. Advise the Executive Director on the opportunities and challenges of switching from Serials Solutions and implementing Encore/EDS, EBSCO’s A to Z, and EBSCO’s LinkSource.
6. A final summary report should be available to the Executive Director by June 15, 2014. Specific charges (items 1-5) may be reported to the Executive Director throughout the EDS trial period as progress dictates.

In addition, during the testing of the integration of Encore/EDS the Task Force will address the following HELIN Goals:

Goal 1: Make the users’ needs central to the delivery of library systems and services

Key Results:

- *Increased use of HELIN systems and services as evidence of continuing relevance*

Goal 2: Collaborate as a regional and national leader in cooperative and consortial initiatives

Key Results:

- *New partnerships that enhance library systems and services to optimize the user experience*
- *Implementation of new systems applications and technologies for optimized delivery of library systems and services*

Goal 3: Create efficiencies and reduce redundancies in library systems and services.

Key Results:

- *Centralized cataloging of e-resources*
- *Cooperative collection development*

APPENDIX 2

Review Matrix for Trial and Evaluation

Review Matrix for testing Encore/EDS - http://bit.ly/HELIN_EDS						
Login URL: http://encore.uri.edu/iii/encoreEDS			LOGIN NAME / BARCODE FOR PC: PC EDS / 25125000236022 FOR JWU: JWU Prov / 25154000338935		other EDS-with-Encore implementations: University of San Diego: http://sallypro.sandiego.edu/iii/encore/plus/?lang=eng Langara: http://langara.bc.ca/library/	
Q&A for EBSCO at HELIN Encore EDS mtg 4/24/14--- http://bit.ly/1m5nKAP						
Question No.	Category	Date	Used PC or JWU?	Question / Asker's initials	Test Criteria / Observations	Conclusions or Actions / Responder's Initials
1	Integration	3/6/2014	n/a	How is relevancy determined when viewing an unfaceted result list. (SM)	Run a search -- check results unfaceted, then facet to Library Catalog, close facet and facet EBSCO EDS	3/13/14 Relevancy ranking description here: https://docs.google.com/document/d/1WxP4VI9bzkKwWkpCizqRA1_OeYcYxO8DG51w4xtA-U/edit
2	Integration	3/6/2014	n/a	Why are there separate Catalog and EDS Facets? Shouldn't everything be included in the EDS Facet and then you can just have a Catalog Facet or tab at the top. (SM)	It appears that there are really 3 separate categories (Catalog Plus, Catalog, and EDS Partners minus the catalog) and that the Catalog results are not fully integrated into the facets. It looks like Encore is keeping the catalog pulled out of EDS instead of a part of it. The initial results screen gives a combined list from EDS partners and the catalog -- not sure how relevancy is determined in this list. HOWEVER, it seems that EDS and the Catalog holdings are not fully integrated. And this can be seen by looking at the format choices (Capital letters for Encore and lowercase for EDS) and clicking on Catalog and EDS separately from the first facet choice. Books in EDS are the books that partners provide not books in the Catalog. (SM)	This lack of integration causes confusion for the user and points to a lack of true integration in the Discovery Product. Need to look at other EDS-with-Encore consortium schools to see how then handle this. (JK) It doesn't seem to happen in other consortiums where they are using the EDS Skin. i.e. Smith College. (SM) 3/17/14 Sent Amy Bentz and Amy Thurlow a screenshot of format types shown for a combined search, which shows several conflicting types for ebooks. 3/18/14 Reply from Amy Bentz: You are correct that the format designations terms come from the metadata of indexed entries for EDS, and from the material type in the MARC record for Encore. You can combine these terms by going to the public admin app and then to Encore Customization -> Material Types. There you can configure which EDS material types map to Encore catalog facet types. A method for mapping format types has been established. SEE QUESTION #20
3	Integration	3/6/2014	n/a	Can the Local Collections be removed and replaced by a Catalog Tab? (SM, JK)	Other EDS with Encore schools have done this (e.g. Univ of San Diego)	3/13/14 Question sent to Amy Bentz/ III (JK) 3/13/14 Received reply from Amy Bentz that tabs have been changed to CATALOG PLUS and CATALOG
4	Integration	3/6/2014	n/a	What are all the format choices and how are results categorized into certain fomats? (SM, JK)	Currently there more than one format choice for books, ebooks, "e-books, etc", videos, on-line videos. . It looks like they just duct-taped Encore format choices and EDS format choices together and the only way you see one is to facet to Catalog or EDS .SM/JK)	Is this true integration? 3/18/14 See response to QQuestion #20
5	Integration	3/6/2014	n/a	Will we need to remove e-book MARC records from the catalog?	Will we see duplicate records or no records?	3/1/14The best way to use EDS with Encore is to remove MARC records for subscribed e-resources from the catalog. MARC records for OWNED items would stay.
6	Link Resolver	3/6/2014	n/a	Can Custom Link Logic allow user to get to full text of article in one click without having to go to link resolver page? (SM)	Test by linking to articles found in search	Yes, actions which determine whether or not custom link appears can be configured in the Admin Module by EBSCO or by HELIN Library staff. (JK)
7	Link Resolver	3/6/2014	PC	If full-text is not available we currently get the link resolver screen, can this link be customized to go to Interlibrary Loan form? (SM)	Too many clicks just to determine item is not available.	See answer to question #23. Logic can be added to limit the patrons choice to what is available via CustomLinking. Each library would set this up accordingly. Also needs set-up by EBSCO.. (JK)
8	Results	3/6/2014	PC	Are results displayed in Encore/EDS the same as those in native database? (SM)	Search both -- native database and Encore/Eds	4/7/14 Julie K searched "chronic inflammatory response syndrome" in EDS. Limited search to MEDLINE articles. Got 1686 results. Did same search in native Medline, got 14 results. This may have to do with the boolean function and proximity settings in EDS. A search on a broader term ("neurotoxin") yielded the exact same number of results in native database Medline as with EDS limited to MEDLINE. 4/23/14 Sue Reynolds conducted search using term "Irradiated food" on EDS, then with 4 native databases. Limiting to full text: EDS returned 4363 results, 4 databases (EBSCO Food Science Source, Gale Science in Context, Proquest Bio Science Collection, Elsevier Science Direct) returned a combined total of 5582 results. It is not clear how many of the native database articles overlap. This can be adjusted via EBSCOAdmin / Searching / Search Modes / Precision Distance

9	Results	3/10/2014	n/a	The default # of search results displayed on each page is 25, and there doesn't seem to be a way for the user to change this (to 10, 50, 100, etc. Can this feature be added? (PK)		YES- this can be changed on the VIEWING RESULTS tab in EBSCOAdmin (JK)
10	Results	3/7/2014	PC	Questions asked about relevancy - see 2nd and 3rd screenshot in this document: https://drive.google.com/file/d/0BxIM-MFnPzCZNOVMbkx3y1kTXM/edit?usp=s haring (IA)	searching term "internal migration united states", "women in meiji era japan" not using any facets, results did not seem relevant	Relevancy of results is determined by EBSCO algorithm (Question 1) https://docs.google.com/document/d/1WxP4V19zbkbKwWkpCizqRA1_OeYcYxO8DG51w4xA-U/edit
11	Results	3/10/2014	n/a	Currently there are only two options for sorting a search results list: relevance and date. Other possible options to add might include recently added, author (A-Z), author (Z-A), source, title... (PK)	Comparison of current Encore/EDS instance to some native databases	III Encore issue. Will need to formally submit an enhancement request. (JK)
12	Searching	3/6/2014	n/a	How do you modify an existing search? (SM)	There is no "modify search" button	3/18/14 Use "Advanced Search", click again to modify search, or close and open new search window. . (JK) .III Encore issue. Will need to formally submit an enhancement request. (JK)
13	Searching	3/6/2014	n/a	Advanced Search Functionality? Does it really exist? (SM)	Click on "advanced search", get same choices as regular Encore. Want to select terms AND facets	3/13/14 Sent question to A. Thurlow (EBSCO) 3/18/14 From Brett Lebaron (EBSCO): In the EDS interface, it is not possible to limit by Source Type pre-search. It is only possible to limit by Source Type through facets once the results list has been returned. We do have an enhancement request open on our side to offer the ability to limit by Source Type before running the search in EDS: ER 45323 - Limiting by Publication Type or Source Type in EDS (JK) 4/1/14 Amy Bentz's reply to Bob Aspri: This is operating as designed for the current release of Encore. Everything above the line (keyword, title, subject, and author) searches both EDS and the local collection. Everything below the line applies to the local collection. Our roadmap includes advanced search for EDS as well, but the focus of the Encore ES release was to integrate the basic search functionality.
14	Searching	3/10/2014	n/a	Advanced Search Functionality? I tried a combination of keywords and format/collection (e-book/government publications) but results were not limited by format/collection. (JS)	Advanced search "Patriot Day" and collection: Gov Pubs brought results starting with a Columbia encyclopedia article! Looks like catalog records are limited but EDS results are not?	Same as #13 - advanced search does not apply to EDS facets. This will be addressed by III.
15	Searching	3/6/2014	PC	For non-EDS partners, are relevant results displayed near the top of the list or even found at all? (JK) PROQUEST materials need to be searched	Test native databases (i.e. Proquest) with EDS. RWU can search Biology and Business topics. (SM) Differing results EBSCO claims Proquest items will be discovered on Publisher platform.??? (JK) 4/22/14 Of PC - Searched "credit default swap"; narrowed down to results from Wall St Journal, which PC has via ABI/Inform.. Results list showed content provider was ACS (EBSCO). Linksource correctly resolved full text to Proquest platform. (JK) However: When journals indexed in Proquest databases, and nowhere else, will NOT be found. (Example: search for term "neo-dada"; get hits natively in Art Bibliographies Modern. None of the results show in EDS .	4/22/14 Items that are only found on Proquest platforms are NOT discoverable. They must be indexed elsewhere, in which case LinkSource will link them correctly. During HELIN EDS Task Force meeting on 4/24/14, EBSCO Sales VP Ed Roche told the group that Proquest and EBSCO were working on a metadata sharing agreement. THIS WILL BE CRITICAL IN OUR ADOPTION OF ENCORE/EDS.
16	Results	3/10/2014	n/a	Looking at search results if I get to one of the less relevant articles, I have to read the whole record to figure out why it came up. Shouldn't the keywords be highlighted or bolded in the record? (JS)	Is this just me? Is anyone else seeing highlighting/bolding of keywords in in results records?	This is an ENCORE "feature". Highlighting of results was removed in Encore ES. (JK)
17	Results	3/13/2014	JWU	Noticed that even if JWU (I am logged in as JWU) has book, the "see all" prompt is in result list and have to mouse over for location. This wouldn't be so bad, except that the "Request" button to the right is very prominent and I think a student would mistakenly think the book is not available. (OV) Seconded by Amanda Izenstark	Suggestion: Have locations show where the "see all" is now. Langara shows Available in green and then location of item where we have "See all"	5/28/14 This issue was addressed during the HELIN/ENCORE Duet meeting at IUG on May 8. This has been clearly demonstrated to III development team. At the very least the wording of the link will be changed to Check for location and availability. It is the task force hope that at least one location and availability be displayed with a more link within a location box.

18	Results	3/13/2014	PC	Why does Encore crash? (OV)	Looking at results and paging through the results, I have had Encore crash quite a few times. Crashed page displays a lot of "red" java and ERROR at top.	4/2/14 III installed a fix to Encore which should correct this problem. 5/28/14 JK We are still experiencing hangs and other odd behavior with Encore Duet occasionally. At the final HELIN Task Force meeting on May 22, Amy Bentz and Bob Aspri discussed the Encore server setup, and how we would most likely switched to a hosted service, which would provide more memory and better performance.
19	Results		PC	Items available as HTML do not show an icon, as do PDFs. (JK, IA)	See Amanda's 1st screenshot in this document (https://drive.google.com/file/d/0BxIM-MFnPzCZNOVMbkx3by1kTXM/edit?usp=sharing (IA) Look at 3rd entry which does not show any icon	3/6/14 Asked EBSCO, they forwarded question to III. 3/17/14 Received reply from Amy Bentz of III: We believe we have a fix for both the intermittent issue with hanging facets and the icons for the HTML facets. I need to have our release engineering team build a bundle and get it tested this week. My hope is to have the fix to you by the end of the week. I'm still waiting to hear back from release engineering and our dev team for a definite date, but we should have the fix for you soon. 4/1/14 Asked Amy Bentz if there was an ETA for this fix 4/2/14 Received fix, problem corrected. HTML items now show "Full Text" button.
20	Searching	3/25/2014	n/a	FORMAT TYPES - UPPERCASE/lowercase = ENCORE/eds (SM)	Material types for resources are duplicated in FORMAT facet. Example: Ebooks,Books,E-BOOK. How would user choose all of these?	3/17/14 Amy Bentz: You can combine these terms by going to the public admin app and then to Encore Customization -> Material Types. There you can configure which EDS material types map to Encore catalog facet types. 3/24/17: Martha and Ruth tried this; via Encore Admin, they were able to change Encore "E-VIDEO" to match EDS "Video". Now only "Video" displays. If we need to change the other way around, (make EDS match Encore), all schools would need to configure EDS the same way. We currently don't know where this setting is. 3/25/14 Asked EBSCO if we could combine duplicate terms in EDS, which would allow 1-to-1 mapping of EBSCO and Encore formats ANSWER FROM EBSCO: At this time, it is not possible to change the label or mapping for items returned in the Source Type facet. I will open an enhancement request to alert the development team that this is a requested feature for EDS. 4/2/14 Encore 4.4, which wa installed in early May, will contain the following enhancements (per Email from Anthony Rogers, III): Merged Encore and EDS facets (this should address your concern about overlapping facets) Create Custom Encore facets from any custom keyword indexes that are owned
21	Searching	3/31/2014	n/a	Advance Search /Format - Different results in Catalog and Catalog Plus tabs (OV)	Material types for resources are duplicated in FORMAT facet. Example: Ebooks,Books,E-BOOK. How would user choose all of these?	Same as question 20
22	Result Screen	3/31/2014	n/a	Variability in how to get to online content is a problem (OV)	Sometime there is only link on bottom left that says "Show Links To Web Content" with pop-up window, other times there is a list of school's various links directly in the record, other times the link says "view online", other times you have to go to right side to click PDF, other times there are three links in one record (one says "more", one says "ebook", one says "Find full text..."). This is too confusing, and should be standardized in terms of both how links are labeled and where the link button is located.	4/3/14 See answer to Question 23. Each school can control what is presented to the patron for each item. This is controlled through EBSCOAdmin parameters such as CustomLinks and Viewing/Linking options. Neither PC nor JWU has yet to do extensive refining with these parameters. CustomLinks will be the subject of the EBSCO WebEx on 4/14 (JK)
23	Result Screen	3/31/2014	PC	Where is article linker? (OV)	Why do some articles not have the article linker available, when there is no full text? A good example is to search for "chronic inflammatory response syndrome" Then scroll down the result list.	4/3/14 You can limit the display of results like this to ONLY present the ILL button. (JK) 4/7/14 Brett Lebaron of EBSCO is working on fixing this. EDS can determine if full text is available or not when results are displayed. If item is NOT available as full text, only the "Request via ILL" button will display. 4/23/14 Changes made to LINKING parameter in EBSCOAdmin. PC's results now show "Request item via ILL" link if no full text available (both on Linksource screen and Detailed Results screen). We are still waiting for an "ILL" custom link button to display directly next to result.

24	Result Screen	3/31/2014	n/a	More.. button problem (ov)	here is something wrong with the "more" button in links from EDS results(articles). After you click on the "more" button once you cannot click on it again unless you reload the page.	4/3/14 This is happening in Firefox, no one has documented it in another browser. Has to do with "popup" settings in browser. Group is being asked to document instances of this, send to Julie to forward to III.
25	Result List	3/31/2014	PC	De-duping (EDS results) (OV)	Sometimes there are duplicates in the result list. I thought EDS results were de-duped?	4/3/14 Duplicate results may appear if the logic for the CustomLink allows it to happen. This can be controlled via EBSCOAdmin configuration modifications (JK).
26	Result List	3/31/2014	n/a	Publication data (OV)	Variability in inclusion of publication location in records. Publication location is important to determine if you have the correct item & for writing bibliographies. Some records have publication location, others do not. However you can get to it via clicking on title. Should be standardized.	4/3/14 Martha - Innovative has already fixed the issue with publishers not always appearing in the Encore browse screen even when present in the MARC record itself. Please let me know if you see this again (of course, many bibliographic records don't actually list the publisher). As I'd expected, with some records the publisher was listed in secondary publication fields.
27	Result List	3/31/2014	n/a	Display choice of color "gray" (ov)	When you are not holding your mouse over a specific record, the buttons in that record gray out to a lighter shade. Often when something is grayed out like that it signifies that you cannot click on it (such as when you are using Microsoft programs) so I find this a bad design choice. The choices under "Additional options" in particular gray out so much that you can barely see them until you put mouse on the record.	4/3/14 This also happens currently with Encore Synergy. Encore enhancement request is needed.
28	Consortium	4/3/2014	n/a	How would a student find that another school had access to a non-owned journal? (JS)	Currently, librarian can see which school owns which journals, and can send them to that school.	4/2/14 Martha - Ask Amy Thurlow if they could put together a journal title list for all of HELIN. Or - Could EBSCO make a "Search Consortium" button? Or would this be a ILL function. Or, could link to A-Z list for each school with a drop-down menu on the HELIN home page.
29	Results List	4/7/2014	PC	Encore with EDS intermittently loses search terms when faceting to EDS only	Example: Search for term "Particle physics". See results in both Library Catalog and EBSCO EDS. Click on "EBSCO EDS" to see Discovery results. Get a blank screen with 0 results, with message "did you mean 'particle beams'?. This has happened with other searches .	4/7 Per Amy Bentz of III, this is an EBSCO problem. Amy Thurlow said she would check with EBSCO team. 5/14/14 Instances of this occurrence will be sent to III by Julie. This also may have to do with ENCORE server memory problems; this should be corrected when Encore becomes a hosted service upon our adopting of Encore Duet.
30	Results List	4/22/2014	PC	More...scroll bar	When you display the more box and then try to use the scroll bar if the text is longer than the box can hold, it is impossible to maneuver. Every time I click on the arrows or the bar itself the box completely goes away. (SM)	4/24 This would also need to be submitted as an enhancement request.
31	Results List / Det	4/22/2014	PC	"HELIN CATALOG" customlink does not work. (JK)	When clicking on the title of results with no direct full-text link, some of them have "Request item via catalog" customlink. I have 2 questions: 1) how does EDS determine when to show this custom link, and 2) the link does not work, query string needs to be fixed.	4/23/14 JK - This is an EBSCOAdmin customization issue. I was able to eliminate this occurrence by going into EBSCOAdmin Linking section, editing Providence College OPAC Link, changing SHOW LINK from ALWAYS to IF IN COLLECTION. This way, the link does not appear if the item is not available (instead should display "request via ILL" link)
32	Authentication	4/23/2012	RWU	Off campus Prompt to login is missing when no results are found in Library Catalog	If a user does not log in FIRST before doing any searching, and the terms they use return no catalog hits -- they see only a suggestion for a different search term even though there are multiple hits in EDS. No Login prompt, no EDS results. i.e. -- Run a search on dna barcoding and algae from off-campus.	4/24/14 Reported verbally to Ed Roche at HELIN EDS meeting, but will need formal follow-up
33	Results	4/24/2014	PC	Issue narrowing to 'peer-reviewed' results - JD. Looses results when I try to facet to peer-reviewed.	I did a search for "simpson, o.j. trial civil charges" and tried to narrow to "peer-reviewed" under EDS. The results didn't vary when I clicked the facet.	This is the same issue as Question 29. Please send screenshots to Julie K so she can forward them to III. This also may be due to the fact that there are no peer reviewed results for this search. If this is the case, the screen should indicate "0 results" instead of indicating that there are no terms found for your search. (Question 32)

APPENDIX 3
Usability Testing for Encore/EDS – Spring 2014
HELIN Consortium
17 Surveys completed

Quick Analysis of Findings

- Facets not seen at all in left gray bar
- Left column is confusing and users are not clear at first how or why to use it – so they ignore it.
- Users don't like scrolling through facets - don't find facets that are near bottom – i.e. date
- Facet names and labels are confusing – especially duplicate facet types
- Once users became accustomed to facets, they liked being able to narrow their search from them.
- Would like check boxes to select more than one facet choice.
- See all link is not clearly understood and it is frustrating to have to click on it to find a book's location and availability
- A lot of stuff going on
- User focus is on the center column
- Advanced Search functionality is not producing good results
- Icons not located in similar places on the screen are missed
- Some liked the idea of having everything together in one database, others found it more confusing.
- Not understanding the difference between Catalog and Catalog Plus

Question #1: Find two books at this Library by Tracy Kidder

Actions:

- | | |
|---|--------------------------------|
| • Searched author first name last name | 16 |
| • Search author last name, first name | 1 |
| • Used Library location Facet | 8 |
| • Used Books Format Facet | 1 (used before Location facet) |
| • Did not see facet | 1 |
| • Used see all link to see if library owned | 1 |
| • Did not see location facet right away | 7 |

Comments:

- See all link not easy to use because have to click it each time to see if your library owns the book – frustrating- especially when there are several editions listed.
- Page was not so clean and has a variety of icons – annoyed that she had to figure it all out
- One typed “book by Tracy Kidder”
- Location facets not always noticed at first. Some did find it eventually

- Students not seeing facets, clicked on book titles and were frustrated they had to keep clicking on the titles to find one their library owned.
- One student typed in Tracy Kidder PC in an attempt to limit to her library – was frustrated with see all link and did not see facet at first.
- One began search at Advanced Search to search Author and then typed in Tracy Kidder

Problems noted:

- See all link is frustrating and doesn't really describe well what the user will find
- Too much to take it at once
- Facets not noticed at first by almost half of the users – focus attention on center results column

Question #2: Does the Library own a copy of Catcher in the Rye by J.D. Salinger?

Actions:

- | | |
|---|----|
| • Typed in title | 15 |
| • Limited by Library – location facet | 9 |
| • Used only see all links to determine location | 2 |
| • Clicked on title to find location | 7 |
| • Clicked on see all to find location | 4 |
| • Used Title facet and then the see all link | 1 |
| • Did not see location facet at first | 1 |
| • Used Advanced Search – Keyword | 1 |
| • Used Advanced Search – Title/Author | 1 |
| • Switched from Catalog Plus to Catalog | 1 |

Comments:

- Did not notice “see all” but also would not expect to find call number from “see all”
- Users that found location facet in Question 1 used it here. Those who didn't continued on without seeing it. Again almost half did not see location facet.

Problems:

- Two users did not find book –2 (one didn't see it at top of results and gave up, one so compromised her search by choosing different facets – it didn't show up.)
- See all link confusing once again
- Have to click again on see all or title to find call number
- Some people learned to click on location facet from first questions, users that didn't see facets in question 1 continued not to see them in question #2 -- almost half

Question #3: Please find one book and three articles on this topic: Public Opinion during the Vietnam War. *One article needs to be written in the 1960s.*

Actions

- Search Terms:

- Public Opinion Vietnam War 2
- Public Opinion during the Vietnam War 10
- Public Opinion during the Vietnam War using Adv. Search-Keyword1
- Public Opinion during the Vietnam War using Adv. Search-Subject 2
 - Then later modified to search date in adv. search
- Vietnam War then decided to narrow with Public Opinion 1
- Public Opinion during the Vietnam War 1960 1
- Faceted by format 1
- Faceted by Date 6
- Faceted by Academic Journals 1
- Faceted by Books 3
- Faceted by Magazines 2
- Scrolled result list before finding facet 1
- Never found facets 1
- Used refined by tag for Public opinion 1
- In adv. Search typed in years 1960-2014 1

Comments:

- Never used facets, only looked at results – depending on Icon next to result to tell me if it is a book or article. Did not know she could limit to articles.
- Did not limit by date with Encore interface, but when asked to repeat her search on straight EDS interface, she saw the Date limit right away. She said she ignored gray column because it was gray and too cluttered.
- Date facet was hard to find
- Advanced searcher techniques did not located books so she asked interviewer for help. Did not see facets for Academic Journals and date until they were pointed out.
- Confused by two facets for Books and Books, etc. and wished that more than one option could be selected
- Confused when did not find Articles in the Format facet (search was: Public Opinion during the Vietnam War 1960)
- Do Academic Journals count as articles?

Problems:

- Facets not seen. When the user is able to use them correctly they can find info requested.
- Date Facet is too far down to see.
- Used Advanced Search to pre-limit by date – instead of using facets
- Duplicate format facets were confusing
- Desire to choose more than one option under a facet.
- Poor searches can limit your facet choices
- Looking for Articles even though Academic Journals is a facet choice under format

- Trouble deciphering the source types in the results list.
- Total confusion – not understanding what facets mean, clicking on anything – not knowing what it was. Not seeing facets, just clicking on results hoping to find an article – but not even sure what an article is.
- Not sure what an article or where it comes from – Do Magazines or News count as articles?
- General frustration with finding different source types and narrowing a search by date.
- Only one-third of participants saw the limit by date facet.

Question #4: Find and online video about Children of Divorce

Actions:

- Search Terms
 - Children of Divorce 17
- Used Format Facet for video 17
- Selected format facet for online resource 1

Comments:

- Did not like hunting for the facet – too long of a list
- Spent too much time scrolling both results and facets before selecting video and finding online version.
- So many facet choices are confusing.
- Duplicate sounding facets are confusing – Video vs. Video/DVD
- By the fourth task students seem to learn to use the format facet

Problems:

- Facet names are confusing and duplicated

Question #5: Find an article citation

Actions:

- Searched article title 11
- Typed in whole citation 3
- Went to Advanced Keyword search name of Journal 2
- Went to Advanced Keyword Search –Author – 1
 - Typed in authors and title then selected format e-journal. No results. Kept trying different searches in Advanced Keyword search until he found it.

Problems: If chose not to type in article title they received no hits or too many hits.

Question #6: Find a Course Reserve

Actions:

- Searched Professor's name 11
- Went to Advanced Keyword Search – not finding what they wanted went back to Basic search, confused as what to search 1

Problems:

- Didn't see course reserve icon because it was in a different location than the other format icons she had been looking at before.
- Users weren't sure they had found items on course reserve – not noticing icon right away

Post Task Wrap-up Questions

On a scale of 1 – 5 how did you feel on this site with 1 being completely confused and 5 being everything made sense

Rating of 1 0

Rating of 2 2

Rating of 3 5

Rating of 4 7

Rating of 5 3

What did you like about this site?

- Advanced Search option – I always use Advanced Search
- Everything is in one place
- It looks nice, very crisp and clean
- Similar searches, single search box, multitude of facets
- Link to ebooks was easier
- Searching by format from main search page
- Format icon in the center column
- Similar to Encore which this user finds user friendly and easy to navigate compared to other ILS systems she has used.
- Having everything in one database together
- I liked how I could refine my results as much as I could be as specific as possible to find what I was looking for.
- I think the search bar is useful. You can type in what you're thinking and most times actually find it.
- One search box is a good idea, including course reserves
- Easy to use if you know what you are looking for, especially books and videos. Colors are plain and not distracting
- I liked the side bar with all the options
- Unlike the Simmons College EDS, one student appreciated how our site highlighted specific results when mousing over them.

What did you NOT like about this site?

- I don't think the library community will easily navigate – it's difficult for the unseasoned user.
- The Advanced Search option has a reset button. Should the Basic Search have one also?
- I felt that it was difficult to use, although it provided results, it felt confusing at times.
- Location of items should be listed under title rather than having to click "see all" or use facets on left
- Do we click on the title or the icon for a result?
- I don't like the way one searches for an article.
- The results page didn't tell me enough about the materials
- Too many facets, too long a list
- Check boxes would be better because it is too tedious to have to choose one facet, wait for results and then change to another
- Facets bar disappeared when she searched and had to read results individually
- I did not like that I was not familiar with the page asking for my authorization because I had never seen it so I just closed out—this happened when student got lost and encountered a Worldcat page.
- There is a lot going on in the webpages which makes it hard to find exactly what you're looking for unless you know how to narrow your search.
- Color – even white would be better than gray
- Too many facets and too many options
- Facet options not always clear, particularly for format – books vs. books, etc and videos vs. video/dvd
- Sometimes it was difficult to find certain articles- specific dates
- Because the colors are plain, it is hard to distinguish things at times. Perhaps more colors should be used to make text stand out.

What did you find confusing or a problem?

- Location? E-resource vs. actual resource
- What's the difference between catalog plus and catalog?
- When you click on "advanced search" previous search remains.
- Would prefer the facets to be closed rather than open so you can view them all without having to scroll.
- Check boxes for facets would work better
- The color scheme is too plain. (note: from interviewer – is Content Café working – very few book covers show up.
- The facets on the left are harder to see than the records in the middle so it is easy to miss facets

- Having everything together such as books and articles felt more confusing than helpful
- Advanced search screen was stuck, giving wrong results. Search for Tracy Kidder and kept getting Catcher in the Rye.
- Online video facet
- When the results list says “Top results for articles” I am confused – what does that mean? Who determined these were the top? And then it says “view over 5000 more” I want to search by database and it lost my Vietnam focus.
- Want to see more important facets only near the top. Gray facet column is easy to ignore –only focus on center column only.
- Facet labels were confusing
- See all link in record is confusing – maybe it should say check availability
- Facet list is too long – too much scrolling.
- Facets bar on the left is confusing. You should not have to scroll down to see all the kinds of facets there are. You should not have to scroll up after you have looked at a bunch of results to find the bar again. If it were easy to see the kinds of facets available on the screen all the time, it would be easy to choose the best ones first, and other ones after you see whether you are getting the kinds of things you need.
- I find it confusing trying to look for stuff on Vietnam. It was very broad and I was getting information on other wars.
- Not knowing how to narrow my results.
- The advanced search did not seem to work properly.
- “Book” label for ebook was misleading
- Didn’t really notice facets at first or the course reserves icon/text
- Prefer to use Advanced Search as it is hard to find specific authors and titles with a basic keyword search.