Discovery Duo: Examining EDS and Encore Duet Discovery Options.

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Discovery Duo: Examining EDS and Encore Duet Discovery Options

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2017 Innovative Users Group Meeting
3 March 207
National Harbor, MD
Why the Investigation

The Florida Academic Library Services Cooperative (FALSC), a program of the University of West Florida/Florida Virtual Campus, is implementing a new integrated library system (ILS) to manage millions of books, electronic journals, and other educational material across Florida's 40 public colleges and universities. The new system is scheduled to "Go Live" in late July 2017.

Key System Changes

- Innovative’s Sierra ILS will replace Aleph and related tools.
- Innovative’s Encore Duet discovery interface will replace Mango and Primo.
- EBSCO’s index of metadata will replace the Primo Central Index.
- Single shared bibliographic database for libraries at all 40 institutions.
- Once the new ILS is live, FALSC will decommission the legacy ILS and its related products.

https://libraries.flvc.org/about-sierra-encore-duet
Consortial Implementation: FALSC

- 40 colleges and universities
- Shared Sierra - Shared Bib
- All libraries attach holdings to single bib
- Configured in Sierra like library branches, with location codes and suites
- Some admin and customization choices apply to *all* suites
- Some admin locked to FALSC-employees only
UCF’s Current Set Up

- ExLibris Aleph
  - MARC
  - Mango
  - MARC
- EBSCO Discovery Service
Get started with a quick search of the catalog and multiple databases.

Search Databases, Articles, and Catalog
UCF’s Options with Sierra, EDS, and Encore Duet

[Diagram showing the integration of Sierra, Encore Duet, and EBSCO Discovery Service]
• Encore Duet only
• EBSCO Discovery with MARC
• Encore Duet and EBSCO Discovery sans MARC
• Encore Discovery and EBSCO Discovery sans MARC
• Encore Discovery and EBSCO Discovery with partial MARC...
Show of Hands

- How many using or implementing Encore Duet?
- How many EDS customers? EDS admins in the audience?
- How many have an Innovative ILS and use some other discovery system?
We Get Both Encore and EDS. Which Should Lead?

- Encore Duet uses EDS API to pull in EDS article results.
- EDS loads Sierra MARC into its unified index, which is searched in EDS.

**Considerations:**

- User Experience
- Content Handling
- Management and Admin
- Relationship with Other Systems
The Pieces Going into Encore Duet and EDS
Overlapping Jumble of Content, Systems, Interfaces
The Pieces Going into Discovery

**Discovery Interfaces**
- EBSCO Discovery Layer
- Publication Finder

**Back-End Systems**
- EBSCO Admin
  - EDS Profiles
  - Publication Finder, Full Text Finder, Holdings Management
- EBSCO Discovery Index
  - Database Options
  - MARC Loads
  - OIA-PMH Loads

**Content**
- Encore Duet
- Encore Discovery

**Sierra ILS**
- Encore and Encore Admin
- Sierra ERM

**Sierra MARC**
- OIA-PMH Loads to Encore
A Peek into Encore Duet
Encore Discovery, Oversimplified

Vastly oversimplified representation of Sierra...
- Bib records
- Order records
- ERM
- Course Reserves
- Interlibrary loan
- Technical services
- Other stuff...
What Goes Into Sierra MARC?

Vendor Supplied Records

Bibliographic Utilities

ERM/Knowledgebase Records

SIERRA MARC

Library Created MARC

MARCive

Connexion

GOBI

T&F EBS

Kanopy

DDA

Gale

ECCO

SkyRiver

SFX

Arcane Rituals

Copy Cataloging
Encore Duet Pulling in EDS Results

EDS API

Search Results

Search Commands

Encore *Duet*

MARC

Sierra ILS
A Peek into EDS
Content, Admin Settings, Discovery

- Discovery
- Admin Limiters
- Link Settings
- EDS Index and Database Selections

More oversimplification...
- Database selections and settings
- Search settings
- Link settings
- Other stuff...
EDS Content: What Goes Into The EDS Index?

Subscription Databases
- Gale OneFile
- Cochrane
- INSPEC
- Business Source
- CINAHL

Publisher Supplied
- Wiley
- OUP
- Elsevier
- T&F

Free/Open Access
- HathiTrust
- arXiv
- MEDLINE
- DOAJ
- Digitized
- MARC
- IRs

Library Supplied
- Springer
- Springer
- Taylor & Francis
- Wiley
- Gale OneFile
- Cochrane
- INSPEC
- Business Source
- CINAHL
EDS Integrating Sierra MARC in the Unified Index

Diagram:
- Discovery
  - Admin Limiters Link Settings
- EDS Index and Database Selections
- MARC Extract
- Encore Discovery
  - MARC
  - Sierra ILS
Customizing EDS Content

- Content Questionnaire
  followed by
- EBSCO Admin:
  - Databases Tab
  - Search Tab
  - Linking
Content Controls in EBSCO Admin: Databases Tab

<table>
<thead>
<tr>
<th>Discovery Service Sources</th>
<th>On</th>
<th>Off</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCF Libraries Catalog (cat00846a)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UCF CONTENTdm Collections (ir00133a)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UCF DigiTool Collections (ir00171a)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC-CLIO Social Studies Databases, Academic Edition (edsaca)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC-CLIO Social Studies Databases, School Edition (edsabc)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Abstracts in Social Gerontology (27h)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academia (edsnac)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic OneFile (edsgao)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Search Index (asx)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Enable/Disable Metadata Sources
- On: Metadata from this database will be searched and might show in EDS and Encore
- Off: Records from this database won’t show in EDS or Duet
Content Controls EBSCO Admin: Searching Tab

Pre-applied limiters
On means ONLY show hits that are:
- Full Text
- Available in Library Collection
- etc.

<table>
<thead>
<tr>
<th>Order</th>
<th>Limiter Tag</th>
<th>Edit Limiter Label for</th>
<th>Default</th>
<th>Show</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>FT</td>
<td>Full Text Online</td>
<td>On</td>
<td>✔</td>
</tr>
<tr>
<td>3</td>
<td>SO</td>
<td>Journal Title (Source)</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>4</td>
<td>RV</td>
<td>Scholarly Journals/Peer Reviewed</td>
<td>On</td>
<td>✔</td>
</tr>
<tr>
<td>5</td>
<td>AU</td>
<td>Author</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>6</td>
<td>TI</td>
<td>Title</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>7</td>
<td>FC</td>
<td>Catalog Only</td>
<td>On</td>
<td>✔</td>
</tr>
<tr>
<td>8</td>
<td>FC1</td>
<td>Digitized Collection</td>
<td>On</td>
<td>✔</td>
</tr>
<tr>
<td>11</td>
<td>DT1</td>
<td>Published Date</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>96</td>
<td>LA99</td>
<td>Language</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>97</td>
<td>OZ</td>
<td>Collection</td>
<td></td>
<td>✔</td>
</tr>
</tbody>
</table>
### What does the Full Text limiter match on?

- Hosted full text
- Full Text Finder
- Local Collection / CustomLinks
- URLs embedded in Metadata (including 856s in MARC load)

<table>
<thead>
<tr>
<th>Order</th>
<th>Link Name</th>
<th>Managed By</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>EBSCOhost Full Text (PDF Full Text or HTML Full Text)</td>
<td>EBSCO</td>
<td>Full Text</td>
</tr>
<tr>
<td>11</td>
<td>EBSCOhost Linked Full Text</td>
<td>EBSCO</td>
<td>Full Text</td>
</tr>
<tr>
<td>15</td>
<td>SFX (Journals.FT)</td>
<td>Self</td>
<td>Full Text</td>
</tr>
</tbody>
</table>
A profile defines the databases, collections, limiters, search screens, and other features end-users see. Profiles are set up in EBSCOadmin.
Encore Duet Pulling in EDS Results

API Profile
- Admin Limiters Link Settings
- EDS Index and Database Selections

EDS Profile
- Admin Limiters Link Settings
- EDS Index and Database Selections

Search Commands

Search Results
- Title Link
- Full Text Links
- EBSCOhost FT Source
- Link Resolver
- Custom Link

Encore Duet

MARC

Sierra ILS
Float Back Up to Discovery Interface

• Search Interfaces
• Search Refinement and Filters
• Results Order and Relevancy
• Linking
## Search Interface: Check, check, check...

<table>
<thead>
<tr>
<th>Search Interface Feature</th>
<th>Encore Duet</th>
<th>EDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Customizable branding</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>• Search the complete catalog and EDS</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>• Unified, relevancy ranked, list of results</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>• Filters, limitors</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>• Research Starters, Publication Finder</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>• Links to full text</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>• User account features</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>• Item status/availability information</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>
One Month of EDS

- 85,880 Sessions
- 55,604 via EZproxy
- 39,165 Links to Hosted or
- 16,534 SmartLinks (Full text)
- 64,580 CustomLinks (Full text?)

February 2017
Top 50 UCF EDS Search Terms

- microbial resistance to antimicrobial agents
- independent payment advisory board
- landers colonial plantation
- antacids
- migraine
- kano's model: an integrative review of theory and applications to the field of hospitality and tourism
- hipaa
- gordis epidemiology
- video games
- cancer
- obesity
- social anxiety
- time management
- microbial resistance to anti-microbial agents
- social determinants of health
- nursing research and sample size
- dementia
- down syndrome
- aca
- diabetes
- mmy
-Ỵitude
- ipab
- ibisworld
- social media
- hiv
- web of science
- communication
- nursing
- epide
- sappho
- aphasia
- yoga
- meow
- umn
- literacy
- feminism
- timeshare
- verizon
- human trafficking
- hoovers
- scifinder
- soccer
- agile
- verizon
- nursing shortage
- science and children
- hammurabi's code
- harry potter
- vacation club
- isis
- mental measurements yearbook
- the business of resort management
- ibis
- speech perception
- ibis world
- wall street journal
- affordable care act
- competitive marketing in tourism
- strategic planning
- guestology
- jstor
- lexis
- discourse community
- ibis
- barbara tomlinson
- tuning
- vacation ownership
- stuttering
- ibis
Branding: Gold and Black Branding Everywhere

**EDS**
- Branding tab in EBSCO Admin
- CSS and Java in Footer
- Search form builder for embedded search

**Encore Duet**
- Branding settings in Encore Admin
- Entry fields for CSS and Java
```
Encore Duet Advanced Search

<table>
<thead>
<tr>
<th><strong>Advanced Search</strong></th>
<th><strong>Basic Search</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Keyword</strong></td>
<td><strong>nursing research and sample size</strong></td>
</tr>
<tr>
<td><strong>AND</strong></td>
<td><strong>Keyword</strong></td>
</tr>
<tr>
<td><strong>Add boolean</strong></td>
<td><strong>AND</strong>, <strong>OR</strong>, <strong>NOT</strong></td>
</tr>
<tr>
<td><strong>Year</strong></td>
<td>to</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Library Catalog</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Format</strong></td>
</tr>
<tr>
<td><strong>Institution</strong></td>
</tr>
<tr>
<td><strong>Location</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>EBSCO EDS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EDS Limits</strong></td>
</tr>
<tr>
<td><strong>EDS Expanders</strong></td>
</tr>
<tr>
<td><strong>Apply equivalent subjects</strong></td>
</tr>
<tr>
<td><strong>Apply related words</strong></td>
</tr>
<tr>
<td><strong>Also search within the full text of the articles</strong></td>
</tr>
</tbody>
</table>

```
EDS Advanced Search

Search Options

Search Modes and Expanders

- Phrase
- Find all my search terms
- Find any of my search terms
- SmartText Searching

Apply equivalent subjects
Apply related words
Also search within the full text of the articles
EDS Hits: nursing research and sample size

Search Results: 1 - 30 of 12,459

1. Defining and Understanding Pilot and Other Feasibility Studies.
   - By: Morris, Nancy S.; Rosenthal, Deborah A.
   - Journal: American Journal of Nursing
   - Database: General Science Full Text

2. Understanding sample size determination in nursing research.
   - By: Lenz, B.
   - Journal: Scandinavian Journal of Caring Sciences

3. The large sample size fallacy.
   - By: Lenz, B.
   - Journal: Scandinavian Journal of Caring Sciences
Real Time Availability Check (Aleph)

Sierra API integrates Bib, Item, and Patron
Encore Duet Hits: nursing research and sample size
### Search Results: Hidden Influences

Choose Profile: EDS API (III) (wsapi) - wsapi

Learn more about Integrated Search

### Expanders

<table>
<thead>
<tr>
<th>Show</th>
<th>Expander</th>
<th>Edit Expander Label for</th>
<th>Default to Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>Thesaurus</td>
<td>Apply related words</td>
<td>On/Off</td>
</tr>
<tr>
<td>✔</td>
<td>Full Text</td>
<td>Also search within the full text of the articles</td>
<td>On/Off</td>
</tr>
<tr>
<td>✔</td>
<td>Enhanced Subject Precision</td>
<td>Apply equivalent subjects</td>
<td>On/Off</td>
</tr>
</tbody>
</table>

[Submit] [Cancel] [Reset to Default Settings]
EDS Expanders and Limiters

Expanders
- Equivalent subjects
- Search full text

Limiters
- Full Text
- Scholarly Journals
- Catalog Only
EDS Example Filters

Filters

4. Sample size: how many is enough?

5. How many subjects do I need in my research sample?


7. Setting sample size to ensure narrow confidence intervals for precise estimation of population values.

8. Using research to advance nursing practice. Resources for determining or evaluating sample size in quantitative research reports.
Limiters

- Library Catalog
- EBSCO EDS
- Peer Reviewed
- Availability
Encore Duet Example Filters
Entries from EDS and from Encore merged into single list (and count)
Content Left Behind (unintentionally)
Discovery Features and Search Tools for Users

- Advanced and Fielded Search
- Facets, Limiters, Refining
- End User Accounts and Personalization
- Widgets, Recommenders, and Additional services
Typical Ranking Factors:
• Weighted fields (subject, abstract, etc.)
• Exact match of term with field
• Density of terms in a record
• Publication date/currency
• Document type
• Document length
• Locally owned (MARC load)
Catalog Result
Early in List (4th)
EDS Relevancy

First Catalog Result in EDS: 244th
UCF’s EDS for Social Media: Books!

Catalog Result is 1st

Research Starter
“Encore Duet respects the relevancy ranking from both the Sierra catalog and EBSCO EDS, giving both systems a ranking score of 1-5. If both systems bring back results ranked number 1, then after the Research Starter and Publication Finder from EDS, there will be an interfiled result set.” – Michael Monroy
Observed Typical Pattern

1. Research Starter
2. Publication Finder
3. Catalog \{ 1 to 6 hits \}
4. Catalog \} 1 to 3 hits
5. EDS
6. Catalog
7. EDS
8. Catalog

9. ... and so on until there are no more catalog results, then it is EDS only.
Encore Duet Pulling in EDS Results

API Profile

Admin Limiters Link Settings

EDS Index and Database Selections

EDS Profile

Admin Limiters Link Settings

EDS Index and Database Selections

Search Commands

Search Results

Encore Duet

MARC

Sierra ILS

Title Link

Full Text Links

EBSCOhost FT Source

Link Resolver

Custom Link
Mystery CustomLinks Overload

1. The **effect of patient, provider and surgical factors** on survivorship of high tibial osteotomy to total knee arthroplasty: a population-based study.

    Khoshbin, Amir; Sheth, Ujash; Ogilvie-Harris, Darrell; Mahomed, Nizar; Jenkinson, Richard; Gandhi, Rajiv; Wasserstein, David; Knee Surgery, Sports Traumatology, Arthroscopy


    Please log in to see more details

Encore Duet
- SFX to Springer twice
- PlumX

EDS
- One SFX Link to Springer
- CustomLink to PlumX

(labels configured in EDS somehow)
## Content Controls EBSCO Admin: Linking Tab

### Full Text Links

<table>
<thead>
<tr>
<th>Order</th>
<th>Link Name</th>
<th>Managed By</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>EBSCOhost Full Text (PDF Full Text or HTML Full Text)</td>
<td>EBSCO</td>
<td>Full Text</td>
</tr>
<tr>
<td>11</td>
<td>EBSCOhost Linked Full Text</td>
<td>EBSCO</td>
<td>Full Text</td>
</tr>
<tr>
<td>15</td>
<td>SFX (Journals.FT)</td>
<td>Self</td>
<td>Full Text</td>
</tr>
</tbody>
</table>

- **Show First Available FullText Link Only (Recommended)**

### Other Custom Links

<table>
<thead>
<tr>
<th>Order</th>
<th>Link Name</th>
<th>Managed By</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>UCF Libraries (cat00846a)</td>
<td>Self</td>
<td>Library Catalog</td>
</tr>
<tr>
<td>107</td>
<td>SFX (all content)</td>
<td>Self</td>
<td>ILL</td>
</tr>
<tr>
<td>108</td>
<td>Plum Print (EDS)</td>
<td>EBSCO</td>
<td>Other</td>
</tr>
<tr>
<td>110</td>
<td>SFX free (unlocked)</td>
<td>Self</td>
<td>Other</td>
</tr>
</tbody>
</table>

### EDS Admin
- Control Link Order
- Suppress multiple Full Text links
- Customize link settings of all sorts
- Links for services and info that is NOT full text
• Databases selected
• Search Settings
• CustomLinks and their order

Keep Your Profiles Synced!
Encore Duet Catalog Entry

- Every library’s 856 Link displays

EDS Catalog Entry

- UCF’s Link displays
- CustomLink to Full Catalog
- CustomLink to PlumX
### Search Results: 1 - 30 of 12,459

1. **Defining and Understanding Pilot and Other Feasibility Studies.**
   - Subjects: Caregivers; Families; Family medicine; Research – Methodology; Medical personnel; Nurses; Nursing – Philosophy; Nursing research; Research; Sampling (Statistics); Marketing Research and Public Opinion Polling; Medical research personnel; Terms & phrases: Sample size (Statistics); Pilot projects; Literature review; Continuing education units; Acquisition of data, Cross-sectional method; Patients’ families; Descriptive statistics
   - ![Get Full Text](#)
   - ![PlumX Metrics](#)

2. **Understanding sample size determination in nursing research.**
   - Publisher: Sage Publications: PMID: 23552333, Database: MEDLINE
   - Subjects: Nursing Research, Sample Size
   - ![Get Full Text](#)
   - ![PlumX Metrics](#)

3. **The large sample size fallacy.**
   - Publisher: Taylor & Francis: PMID: 22962296, Database: MEDLINE
   - Subjects: Nursing Research, Sample Size
   - ![Get Full Text](#)
   - ![PlumX Metrics](#)

---

**Hosted Full Text**

---
Comparison Complications

• UCF does not yet have a fully functional Encore Duet suite
• Configuration flexibilities introduce differences
• Setting up instances for usability testing is non-trivial
Consortia Complications: Different Ideas and Priorities

- Lock step configuration for some features for Encore Duet
- Locked access to some admin
- Some features only available in Encore (Uborrow)
- EDS profiles controlled by local institution but less consortia support
Unknown: UCF User Behaviors, Expectations

What % of time do users...
• ...seek articles?
• ....seek books?
• ....use filters?
• ...follow links?

What do they expect when they enter a search?
UX Goals

- Easy to understand, predictable, and aligned with user expectations
- Search interface and options well suited to the content
- User account and content interaction options suitable to the context and content
- Mobile friendly/responsive
- Minimize the number of systems the user must search to find desired content
Backend System and Management Goals

• Minimize duplicate administration
• Identify “home” for each data set
• Pick home that maximizes integration options, best leverages system capabilities
• Automate synchronization between systems
Inter-related Systems
UCF’s Plan A

• Encore Discovery for catalog/book discovery
• EBSCO Discovery with MARC load for electronic resources for article and online content discovery
EDS Integrating Sierra MARC in the Unified Index

- Create Lists to create a subset
- Scheduler tool to schedule an export
- Send that Review File to EDS
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https://libraries.flvc.org/about-sierra-encore-duet

- Finish initial set up of Sierra
- Final load of bibs, orders, etc.
- Configure ERM (maybe KB?)
- Work out kinks in Encore configuration
- Test MARC extracts and loads to EDS
- Refine branding, labels, linking
- Finish migration from SFX to FTF

**Usability Testing!**
Let’s try it and see how this one works out…
Discovery Duo: Examining EDS and Encore Duet Discovery Options

Athena Hoeppner
eResources Librarian
University of Central Florida, Orlando
athena@ucf.edu
@cybrgrl
Help and Guides

• Innovative Interfaces’ Encore Duet
• EBSCO Discovery Service Support Reference Guide for Administrators
• https://help.ebsco.com/@api/deki/files/1264/eds_iii_admin_support_ref_guide.pdf?revision=1
IR Scenario

- UCF’s IRs are harvested into EDS
- Not included in the catalog

- Potential to harvest into Encore
- UCF’s options:
  - Keep in EDS
  - Move to Encore (only some harvestable?)
  - Create EDS profile just for IR content
MM: Encore Duet respects the relevancy ranking from both the Sierra catalog and EBSCO EDS, giving both systems a ranking score of 1-5. If both systems bring back results ranked number 1, then after the Research Starter and Publication Finder from EDS, there will be an interfiled result set. See an example from our test system here: healthcare reform.

If the Sierra Catalog result set ranks higher than EDS, it’s not uncommon to see Catalog results sets in a row, followed by EDS results possibly ranked #2 or lower. See global warming.

Finally, here’s one where EDS results are only appearing because there are no catalog results matching these keywords: fight for fracking.