ELUNA learns Discovery Session Q & A

Do you expect the total requests stats stayed at the 2023 rate in 2024?

Elyssa: I expect the total requests for ILL to either stay stable or go up slightly, now that our patrons are familiar with the changes to our Primo interface.

How many metadata errors did you find after turning off "Expand My Results", and on average how long did it take to get to get errors fixed?

Elyssa & Mike: Initially we found a significant number, but then it tapered throughout the year. How long it took to fix the error really depended on the error itself, and whether Ex Libris could fix it or if it needed more input from the provider who originally provided the metadata. Another thing to keep in mind that fixing one E-journal record will fix hundreds or thousands of articles.

Have you gotten any feedback from reference and teaching and learning librarians about how this has impacted undergraduate student use?

Mike & Elyssa: Mike spent a lot of time discussing and presenting this idea within our library prior to disabling the "Expand My Results" option. (Mike's response): Most of the Public Services librarians I've asked about this say that it seems pretty seamless for users, especially for undergraduates. There have been one or two who still struggle with finding content in the "Explore All" scope that we do not own full-text access to. I've had to explain the new discovery concept a few times. We also received 2 or 3 complaints from faculty across campus about this. I explained why we were doing this, emphasizing the metadata issue where paid content was being missed by users, and also emphasizing how quickly we can gain access to items we do not own via Resource Sharing. Once they hear this, they have all responded with "Oh, that makes perfect sense.

Sorry could you explain again about why some owned materials are not showing up without expand my results?

Mike: When there is a mismatch with the linking identifier fields (monos = 020$a, 776$z // serials = 022$a, 022$l, 776$x) between Alma MARC records and CDI metadata records, then the Calculated Availability statement in the brief results will be unclear even for those owned/purchased items. This is because brief results in Primo VE brief use CDI Indexing. Once a full record is displayed, then Alma indexing takes over, and so the correct holdings are displayed (in this case, a link to the resource). Even if the E-holdings for those titles are published to CDI, having a matching linking identifier field between Alma and CDI is required in order for the correct Calculated Availability statement to display in the brief results.

Do you rely on records from the CZ for most e-resources? Are you correcting the identifiers in CZ records?

Elyssa: We do rely on the CZ for most e-resources, with the exception of ebooks and streaming videos. We don't correct identifiers in CZ records but instead report them to Ex Libris for correction (in case they're indicative of a larger issue).

For your fully flexible CDI instance, how many collections have you excluded; do you have a workflow in place for activating new CDI collections?

Elyssa: We're not sure how many collections we've excluded, but we do have a clear workflow for activating new CDI Collections - essentially when we subscribe to or purchase new content. If it's an Open Access collection, then it goes through a few departments for a review of the platform and metadata prior to activation.

How do you build and maintain your culture of internal staff refering users to the problem forms?

Elyssa: We take a number of approaches! We frequently talk to the department head of public services (the individuals who physically staff our desk and virtually staff the chat service) about what kinds of questions should come to the e-resource troubleshooting form; we provide training to the public services staff on a regular basis (about 2x per year); we make it easy to submit a problem by using the same ticketing system as the public services desk (Springshare's LibAnswers) so that any chat can be turned into a ticket that is assigned to the e-resources area; we enabled a "Feedback" pop-up in our Primo instance that enables any patron, whether employee or student, to self-report an issue from the discovery layer.

What cataloging fields/subfields have you found impact discovery? Do you have a troubleshooting list for metadata?

Elyssa & Mike: We don't have a troubleshooting list, but that's a great idea! We found that the cataloging fields that really impacted discovery include the 020, 022, and 77X fields. [Mike's note] - I may have misunderstood this question during the presentation, because I was thinking the question was geared more towards general discovery. During the presentation I mentioned the Title, Subject, & Author/Creator fields as fields impacting discovery. But if this question is in regard to the MARC fields that impact whether certain paid/subscribed content is not appearing in the brief results, then Elyssa's answer above is correct.

Mike mentioned "working on" the GES links. What did that entail?

Mike: After removing Expand My Results, I realized the GES links as they currently existed required some tweaking. Specifically, we needed to add new GES entries for those openURL record entries created in Primo from an outside source (mostly databases, WorldCat, etc.). These records appear when a user searches the outside source, clicks the FindText link, and is then taken to Primo with no access and no option to place a request. I added new GES entries for the records where rft.genre = dissertation, issues, or unknown, so that now users can at least place an Interlibrary Loan request on the items. I also did further tweaking of the other GES links in various ways. For example, I combined the E-Books and Print Books in the same GES link because the behavior for

both was similar. I also basically re-entered all the GES links because I wanted to change the naming schemes and service codes, and thus was required to start fresh.

How did you decide what your search scope would be called with disabling expand my results?

Mike: We had called the search scope "OneSearch" for years, but given this recent change, I wanted the name to imply the activity of "discovering", "exploring", etc. I polled several of our library staff and someone suggested "Explore All", which seemed to make sense, so I ran with that. One thing to note too is that we previously called our local collections "UT Collections." Another staff member suggested this should be changed to "UT Collections & Subscriptions," which also made a lot of sense.

How do you explain to users what it is that they are searching?

 Mike: We have a webpage which describes the principles behind what our users can expect from a search, and which also displays a Venn diagram image for the more visually-inclined. That page can be found from the "What Am I searching?" link in our Primo instance: https://utk.primo.exlibrisgroup.com/discovery/custom/01UTN_KNOXVILLE-01UTK/html/homepage/searching.html.

So when you say you removed "expand my results" you removed the toggle but now those results are folded into the general search results, right? your main search results include both things you have access to and those you do not?

Elyssa: Correct! Another way to think of this is that we disabled the option to toggle "Expand My Results" on, and instead made it the default option.

Did you experience any resistance to removing Expand My Results and, if so, how did you deal with that?

Elyssa: We didn't experience resistance, but definitely confusion. There were a number of one-on-one educational conversations that occurred, whether with a patron or a library staff member, throughout the first year. Those have largely tapered out.

We are thinking about setting up an API between ArchieveSpace and Primo VE, do you have any suggestions on where to start?

Lori Stethers: After discussion with the person asking the question, we determined that they are looking to have ArchivesSpace records findable in Primo. You can use Primo's External Data Sources for this and harvest the ArchivesSpaced records via OAI-PMH, you don't need to use the API. As a first step I would set up on a sandbox to harvest the ArchivesSpace records using an external data source profile, then look at the harvested records in Primo to see if they need any adjustments to the data made with normalization rules.

I've been stumped in the past about why sometimes need to use dc:type and sometimes dcterms:type. Can you clarify when to use one or the other?

Lori Stethers: I have not encountered this. I consistently use dc:type in my normalization rules and it works as expected. Primo does look first for a discovery:resourceType value, if not found then looks for a dcterms:type value, and if not found looks for a dc:type value. You should be able to pick one of those fields and use it consistently.