



# EBSCO Discovery Service

## Customization Checklist for Academic Libraries

Your subscription to EBSCO Discovery Service provides you the power to customize a search product to meet the unique needs of your library and your end users. We want to ensure that you are getting the most out of your resources, so we have created a checklist of items to help you customize the EDS experience to achieve your goals.

Please keep in mind that this list includes some of our most popular customizations used to increase the usage and usefulness of your Discovery search tool. Note, however, if you have ever asked yourself, "I wonder if I could..." please let us know. We may be able to help.

**Below are our recommended settings to address key concerns from Academic Libraries:**

### ✓ Create easy access for off-site and on-site users.

- Make EDS visible. Place an [EDS search box](#) or direct link on your web landing page, using your authentication method of choice.
- Get users invested in great results available before asking for authentication by enabling [Guest Access](#).
- Add an [EDS icon](#) on library computers.

Search Discovery

Keyword  Title  Author

### ✓ Consider your audience – to simplify, or not to simplify?

- What is the experience level of your researchers? For less experienced researchers, consider the following options to SIMPLIFY using EDS:
  - Enable only those resources to which you have a subscription – keep that goal in mind when completing the [Partner Database Questionnaire](#).
  - Limit your results to show Full Text or Available in Library Collection only results (no abstracts or indexes included). See these FAQs for more information on limiters: [Full Text Limiter](#), [Available in Library Collection Limiter](#)
  - Be selective when enabling Open Access databases; many of these contain abstracts and indexes rather than access to Full Text articles. [Managing your content in EDS](#) provides directions on how to enable/disable databases. See list of recommended databases below.
  - Alleviate confusion by setting EDS Custom Links to "Show First Available Full Text Link Only." This will provide users only one link to the article in question.
  - Within the Viewing Publications tab, select the "Modify" link for Viewing Publication Results parameter, then select the 'Default Full Text Access to Open' parameter to Yes to provide direct access to Full Text articles that are linked through the Full Text Finder link resolver.
  - If your researchers do best with a smaller result set, consider defaulting to 'Off' for the "[Also Search Within the Full Text](#)" expander.
  - [Modify the facet labels](#) to use terminology familiar to your researchers (e.g. "Databases" instead of "Content Providers.")
  - [Modify the Limiter Labels](#) to guide your patrons on what they actually will do – for example, update the limiters to include the phrase "Limit by" in front of the limiter. Rather than 'Source Types', have the limiter read "Limit by Source Type"
- If your audience is advanced researchers, consider the following to provide those users with more options:
  - Open to the Advanced Search Page in EDS to allow them more flexibility when searching and applying limiters prior to running search results.

- Do not pre-filter on Available in Library Collection or Full Text limiters to allow the A&I results to appear when the initial search is submitted
- Include an ILL Link with your search results should your library support this service for your Patrons, but consider disabling monograph collections (such as the Harvard Bibliographic Dataset, British Libraries Monographic Collection, AGRIS, Center for Research Libraries, & Publications New Zealand) that are not a part of your subscription, as these are not necessarily conducive to Inter-Library Loan.
- Consider enabling additional databases than those to which you subscribe - providing your end users with more options for Interlibrary Loan requests

✓ **Identify the Priority of Your Links and Limiters**

- [Rank your CustomLinks](#) to show the most reliable full text sources when available.
- Choose [which limiters should display](#) on the left side of the results page.

✓ **Enable Apps with EDS to highlight other Library Services.**

- Make room for [Apps](#) and on your Basic search page, Results Page, and Detailed Results page. These tools help library administrators add functionality to their EDS search experience. Some typical apps for you to consider include the following:
  - [Springshare Placard](#) or [Libguides Recommended Results](#)
  - [Save .pdf to a cloud](#)
  - [Item Match Recommender](#)
  - [Chat with a Librarian \(use Ask-A-Librarian Instant Messenger or provide your own\)](#)
- Consider these other apps for your institution as well:
  - [Google Analytics](#)
  - [GoodReads: User Reviews](#)
  - [Survey Request](#)
  - [Mobile EDS API](#)

✓ **Generate lots of usage and make your new search tool known.**

- Check out our [promotion kit](#) for items that will help you market discovery to your end users.
  - Consider re-naming EDS to a catchier name with its own unique logo.
  - Provide your end users with training documentation or classes.
  - Add Tutorial links on your library's home page, or EDS homepage
  - Add EDS lessons to new hire orientation training.

For more information, check out the [Maintaining EBSCO Discovery Service \(EDS\) Best Practices Guide](#) or [Contact Us](#).  
**We are happy to help!**