Explora Setup Best Practices Guide for Library Administrators

This guide describes best practices for setting up Explora, EBSCO’s dedicated interface for schools and public libraries.

You will need to log in to your EBSCO account in order to complete the actions described in this document. If you need a username and password to access your EBSCO account, or if you would like assistance in setting up your new Explora profile, please contact Customer Support.

Creating Explora profiles for different user groups

If you are a school district or consortium, you may wish to create multiple profiles depending on your user groups. For example, a school district may wish to create three Explora profiles targeting elementary, middle, and high schools. Then, you can enable databases that are appropriate to the user group, e.g. students versus teachers (see next section).

For instructions on creating new Explora profiles, follow the steps in the first section of Enabling the Explora interface in EBSCOadmin. Be sure to create unique Profile IDs and Descriptions for each instance of Explora and to assign the correct interface. We suggest the following:

<table>
<thead>
<tr>
<th>Customer Type</th>
<th>Profile ID</th>
<th>Description</th>
<th>Interface</th>
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<tbody>
<tr>
<td>Elementary Schools</td>
<td>explora-es</td>
<td>Explora for Elementary Schools</td>
<td>Explora Primary Schools</td>
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<tr>
<td>Middle Schools</td>
<td>explora-ms</td>
<td>Explora for Middle Schools</td>
<td>Explora Secondary Schools</td>
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<tr>
<td>High Schools</td>
<td>explora-hs</td>
<td>Explora for High Schools</td>
<td>Explora Secondary Schools</td>
</tr>
<tr>
<td>Public Libraries</td>
<td>explora-pl</td>
<td>Explora for Public Libraries</td>
<td>Explora Public Libraries</td>
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<tr>
<td>Canadian Schools - Primary</td>
<td>explora-cp</td>
<td>Explora Canada for Primary Schools</td>
<td>Explora Primary Schools</td>
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<td>Canadian Schools - Secondary</td>
<td>explora-cs</td>
<td>Explora Canada for Secondary Schools</td>
<td>Explora Canada</td>
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<td>Canadian Public Libraries</td>
<td>explora-ca</td>
<td>Explora Canada for Public Libraries</td>
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<td>Australia/New Zealand Schools - Primary</td>
<td>exp-anz-p</td>
<td>Explora Australia/New Zealand Primary Schools</td>
<td>Explora Primary Schools</td>
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Enabling and disabling EBSCO databases on Explora profiles

Once you've created your Explora profile(s), you will need to add and enable databases. To do this, follow the steps in the second section of Enabling the Explora interface in EBSCOadmin.

A number of your EBSCO databases may already be enabled on your Explora profile(s). If this is the case, we encourage you to review the databases that are enabled as searchable and make adjustments as needed. For example, you may not wish to include large academic databases, such as Academic Search Premier, in the elementary school version of Explora. You also may not wish to include ERIC and Professional Development Collection (educator databases that come with EBSCO’s school packages) in your student-facing Explora profiles.

To remove a database from a profile, follow these steps:

1. From the Choose Profile drop-down list, select the appropriate Explora profile.
2. Click the Databases sub-tab.
3. Select to view Enabled databases from the Show drop-down menu.
4. select the Off radio button under the Enable All column for any databases you wish to disable.
5. Click Submit to save your changes.

Choosing databases for your Explora profiles

The following grid lists the typical databases that schools and public libraries enable when creating versions of Explora for different user groups. Although many other K-12 databases are available to schools and public libraries, the grid below lists databases that come with the online school database packages (Primary Online Package, Middle Online Package, Ultra Online Package and Complete Online Package) as well as some region-specific databases.

For the full list of databases compatible with Explora, click here.

Note: Many of the school reference center databases (Biography Reference Center, History Reference Center, Literary Reference Center / Literary Reference Center Plus, Poetry & Short Story Reference Center, Points of View Reference Center, and Science Reference Center) can also be enabled for searching in Explora. However, the content is best

<table>
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<tr>
<th>Australia/New Zealand Schools - Secondary</th>
<th>exp-anz-s</th>
<th>Explora Australia/New Zealand Secondary Schools</th>
<th>Explora - Australia/New Zealand Secondary Schools</th>
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<tbody>
<tr>
<td>Australia/New Zealand Public Libraries</td>
<td>exp-anz</td>
<td>Explora Australia/New Zealand Public Libraries</td>
<td>Explora - Australia/New Zealand Public Libraries</td>
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viewed through the dedicated interfaces that come with these products because they offer unique browsing capabilities and feature areas that provide context to students.

**Elementary Schools**
- *Primary Search, EBSCO eBooks K-8 Collection, Newspaper Source, Topic Overviews K-5*

**Middle Schools**
- *Middle Search Plus, Newspaper Source, EBSCO eBooks K-8 Collection, Topic Overviews 6-12*

**High Schools**

**Public Libraries**

**Canadian Primary Schools**
- *Primary Search, Middle Search Plus, Newspaper Source, TOPICsearch, EBSCO eBooks K-8 Collection, EBSCO eBooks Canadian Collection, Topic Overviews K-5*

**Canadian Secondary Schools**

**Canadian Public Libraries**

**Australia/New Zealand Primary Schools**
- *Australia/New Zealand Reference Centre, Primary Search, Middle Search Plus, Newspaper Source, TOPICsearch, EBSCO eBooks K-8 Collection, Topic Overviews K-5*

**Australia/New Zealand Secondary Schools**

**Australia/New Zealand Public Libraries**

**Explora Educator's Edition**
- *ERIC, Education Research Complete, Professional Development Collection, Teacher Reference Center, Academic Search, MasterFILE, EBSCO eBooks Teacher Resources K-8 Subject Set*

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**Creating direct links to Explora from your library website**

If your users access your EBSCO resources from your EBSCO Select Service Screen, you will not need to take further action to make the interface available to them.
If, however, your users access your library resources from your institution’s website, you will need to create a direct link to *Explora*. For instructions on creating a direct link to *Explora* from your library website, click here.

**Reviewing other *Explora* settings in EBSCOadmin**

Most of *Explora*’s default settings will not need adjusting, but we recommend that you review the following settings to make sure they provide the search experience that best fits your users’ needs.

**Allow users to add more rows to Guided Search**

If you wish, you may permit your users to add more rows to their Guided Search on the Advanced Search Screen. This enables users to further refine their searches using the drop-down Boolean and Select a Field options. To enable this feature in EBSCOadmin:

1. From the *Choose Profile* drop-down menu, select the appropriate *Explora* profile. By default, you will already be on the *Searching* Sub-tab.
2. Under *Advanced Search Screen Settings*, select the *Yes* radio button beside *Add more rows to Guided Style* Find Fields.
3. Click *Submit* to save your changes.

**Enabling Related Images and AP Videos**

If you wish search results to display related images and/or related videos from the Associated Press, you will need to complete the following actions:

1. From the *Choose Profile* drop-down list, select the appropriate *Explora* profile.
2. Click the *Viewing Results* sub-tab.
3. Under the *Show* column, place a check in the box beside *Related Images* and/or *Related AP Video*.
4. Set the *Default to Open* radio button to *Yes*.
5. Click *Submit* to save your changes.

A video carousel will now display in search results when AP videos related to the search terms are available. For more detailed instructions with screenshots, click here.

Related images will appear in the right-hand column of the search results page. Users will need to click the ☰ icon to display the right-hand column. However, you may adjust your settings so that the right-hand column displays by default. To do so, follow these steps in EBSCOadmin:

1. From the *Choose Profile* drop-down list, select the appropriate *Explora* profile.
2. Click the *Viewing Results* sub-tab.
4. Click *Submit* to save your changes.
If, at any time, you wish to preview your changes in EBSCOadmin, click the **View Changes on EBSCO** link at the right of the screen.

If you would like assistance in setting up your new *Explora* profile, please contact [Customer Support](https://help.ebsco.com).