EBSCO Discovery Service (EDS) Best Practices Guide - Setup

Overview

*EBSCO Discovery Service*™ (EDS) brings together the most comprehensive collection of content—including superior indexing from top subject indexes, high-end full text, and your entire library collection—all within an unparalleled full-featured, customizable, single-search experience.

This guide is designed to assist institution administrators through the EDS set-up procedure. While your EDS product is functional early in the process, there are several important pieces of information needed by EBSCO to complete a timely and successful EDS setup.

In this guide, we recommend several key tasks that can be completed by members of your institution staff to configure and customize your EDS product. We also suggest tasks for demonstrating your EDS product to users and soliciting feedback prior to launch.

If resources are available, you may wish to create an EDS implementation team. Key stakeholders may include electronic resources specialists, reference specialists, catalogers, digital archivists, web developers, information technology representatives, and marketing specialists.


**Topics covered in this guide include:**

- Completing the *EBSCO Discovery Service* Questionnaires
- Implementing Knowledge Bases & Local Collections
- Implementing Link Resolvers / Custom Links
- Setting up your EBSCOhost Integrated Search (EHIS) Connectors
- More Customization Options
- Review
- User Demonstration and Feedback

**Your Implementation Team at EBSCO**

For most of you, your EBSCO Sales Representative provided a version of EDS to trial prior to purchase. Now that you have made the decision to purchase EDS, it is time to fully define, or refine, your EDS profile.

The Discovery Solutions team and your assigned Project Coordinator is the liaison between you and various EBSCO teams involved in your EDS account setup. This approach ensures that you have the continuity of service that comes...
with a single contact point. In order to provide the best possible response and resolution time, everyone on the EBSCO team has access to the notes and progress for your custom implementation.

The role of the Project Coordinator is to:

- Assist in interpreting and documenting the EDS set-up criteria specific to your institution.
- Recommend customization features and ensure that they are implemented as requested.
- Ensure a smooth hand-off when your EDS implementation is complete.

The Project Coordinators work closely with the following Software as a Service teams at EBSCO:

- **Catalog and Institutional Repository**: If your EDS implementation includes a custom catalog and/or institutional repository, we have a team who works to create your new custom database and correctly map the fields specified in your EDS questionnaires.

- **Knowledge Base and Link Resolver**: Customers who were not previously using *Full Text Finder* will need an account to provide seamless access through EDS. If you are new and only using *Full Text Finder* for your EDS implementation, your Project Coordinator will coordinate the activity of setting up your account and uploading your holdings.

- **EBSCOhost Integrated Search (EHIS)**: Your order may include one or more custom connectors to resources not indexed by EBSCO. If this is the case, we have a team of specialists who work with our Project Coordinators and outside service providers to search these resources.

- **Discovery Service Engineers**: If your implementation requests include technical assistance with custom search boxes, widgets, or you plan to use the API, your Project Coordinator will work with the Discovery Service Engineers to meet your needs.

**Configuring your profile**

After your order is placed a Project Coordinator will reach out to you to provide an overview of the information needed to implement EDS for your organization. The initial EDS profile set up, includes some of your branding, but may not look like the final product. The purpose of the initial profile is to be a starting point for the customizations that follow.

**Gathering your content**

The first step to customizing your profile is to analyze your library holdings and begin to add content. This really begins during the trial process when EBSCO does a basic analysis of the resources you make available to your patrons. Now that you have decided to purchase EDS we want to make sure we capture all of the appropriate content sources, including any custom resources that need to be created.

We collect this information through a set of questionnaires. Each questionnaire focuses on a specific aspect of your setup. Because your EDS profile is customized, you may not be required to complete every questionnaire. Your Project Coordinator will highlight the necessary information we need to set up your service.
The next section provides an overview of three questionnaires related to the content in your EDS profile that you may be asked to complete: Custom Catalog, Partner Database, and Institutional Repository.

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**Completing the EBSCO Discovery Service Questionnaires**

Three questionnaires must be filled out in order to complete your institution’s EDS account. These questionnaires help the EDS team create your custom catalog database and link your external resources to your EDS account. Completion of the questionnaires goes a long way to ensure a better EDS experience for the user.

**Custom Catalog Questionnaire**

If your order includes a custom catalog, it is important for us to begin work on this as soon as possible, as it takes time for our catalog specialists to set up, configure, and verify your data. For this reason we recommend starting here.

The creation of your custom catalog involves the following steps, with a suggested resource (from your library) noted in parentheses:

- Providing basic information about your ILS system. (catalog specialist)
- Providing information on linking to your catalog records. (catalog specialist)
- Detailing the MARC fields & subfields necessary for EBSCO to harvest specific data points. (catalog specialist)
- Exporting MARC records from your catalog. (technical specialist)
- Uploading your MARC data to an FTP site provided by your Project Coordinator. (technical specialist)

The questionnaire’s instructions outline the steps for the initial export of data from your catalog. For the initial export, you may choose to send us only a sample set of records. Once we receive your completed questionnaire and your data file, we will begin the work of creating your catalog database. After initial testing, we will ask you to review the format and provide any feedback or changes necessary. When things are appearing as requested, a full export and upload, if not already done, will be completed.

More information and the Custom Catalog Questionnaire can be found in the following FAQ: [EBSCO Discovery Service (EDS) - Custom Catalog Database Overview & Instructions](https://help.ebsco.com/interfaces/EBSCO_Discovery_Service/EDS_Best_Practices/EDS_Setup_Best_Practices_Guide)

**Other relevant resources:**

**Partner Database Questionnaire**

One of the key aspects of your EDS purchase is the opportunity to search across an always expanding number of records we receive and index directly from publishers. While a majority of content is available through our core indexes, we have permission to build separate databases for EDS from a number of publishers. These databases comprise a set of content we call Partner Databases, which are represented in the “Content Provider” facet when you limit searches within EDS.

In order to provide a customized experience to our mutual customers, we have designed a Partner Database Questionnaire to assist with setup.

The following information will be requested:

- Customer link resolver and inter-library loan information (electronic resources specialist)
- Awareness of current subscriptions (electronic resources specialist)
- Decisions, or a process for making decisions, regarding the inclusion of Partner Databases and in your EDS profile, including Open Access content (various stakeholders)

More information and the Partner Database Questionnaire can be found in the following FAQ: [EBSCO Discovery Service (EDS) Partner Database Questionnaire - English](https://help.ebsco.com/interfaces/EBSCO_Discovery_Service/EDS_Best_Practices/EDS_Setup_Best_Practices_Guide)

Once the questionnaire is completed and submitted, the information is sent directly to an EBSCO representative for implementation.

**Updating Partner Content**

As the list of partners grows, we send announcements in the form of press releases, as well as email notifications detailing new additions. These announcements will detail whether you need to take any action to include the content additions in your profile, such as adding a CustomLink for the resource. Some partners may be automatically added to your profile, depending on the type of content they are providing. You always have the option to remove content.

**Other relevant resources:**


**Institutional Repository Questionnaire**

You may wish to have your institutional repository, or digital archives, directly loaded in EDS so it can be fully searched alongside other EDS resources. If you select this option, you must complete the Institutional Repository (IR) Database Questionnaire. The questionnaire covers the complete setup of your repository, from initial branding and display questions through data mapping and record retrieval options. Since each repository is different and may contain unique aspects, each institutional repository is analyzed for optimized loading and display.
It is important to note that, although your custom IR database is a part of your discovery layer, EBSCO does not host the content. We load the descriptive information about objects in your library’s archive/repository and set up links in EDS that direct users back to your archive/repository where they can request, retrieve, or view the item.

OAI-PMH and FTP are the standard formats for retrieving institutional repository metadata to an EDS Institutional Repository. OAI-PMH is our preferred method of harvesting data from your repository. If your repository is OAI-accessible, please use this method to fetch data. If this is not an option, we can set up an FTP account for you to submit a data file.

**Supported metadata formats:**

- Dublin Core (qualified and unqualified)
- EAD
- Junii2
- METS
- MODS
- If other, please send EBSCO sample data and a completed IR questionnaire

**Tools for completing the Institutional Repository Questionnaire**

Before you start the questionnaire, make sure you have the following:

- Basic information about your repository – name, description, software/vendor (digital collections specialist)
- Data acquisition preference (digital collections specialist/technical specialist)
- Decisions or a process for making decisions, on preferred linking to your collections, as well as the presentation of the collection itself (various stakeholders)
- Ability to define the data elements present in your repository (digital collections specialist)

You are now ready to download and complete the Institutional Repository/Digital Archives Database Questionnaire:


**Other relevant resources**

- [EBSCO Discovery Service (EDS) - Institutional Repository/Digital Archives Publication Type Lookup Table](https://help.ebsco.com/interfaces/EBSCO_Discovery_Service/EDS_Best_Practices/EDS_Setup_Best_Practices_Guide)

**Note:** If you need assistance with any of the questionnaires, your EBSCO Project Coordinator can arrange a meeting or training session to review the information needed.

Implementing Knowledge Bases & Local Collections

A key feature of EDS is the ability to limit results to items available in your library. We call this the “Available in Library Collection (AiLC)” limiter. The local collection generally contains all of the items your library holds in electronic format, but may contain any items you choose to include.

The local collection in your EDS profile is usually built from a knowledge base of your items. There are several knowledge base service providers, including EBSCO’s Full text Finder. A knowledge base provides the following tools to facilitate access to electronic collections:

1. A “catalog” of your electronic items and a website interface to search those items
2. Data necessary to populate your link resolver, connecting users to your resources

If you do not currently have a knowledge base provider, or you have selected to change services to Full Text Finder, you will be provided with access to Holdings Management within your EBSCOadmin account and will work with us to add your holdings through the EBSCOadmin console. You will have access to update your holdings as often as necessary to keep your limiter up-to-date, so you will want to make sure you have a workflow in place for updates as your collections grow.

EBSCO representatives are happy to assist you with loading your holdings to Holdings Management, or you can opt to do it yourself. All of the EBSCO databases and resources will load automatically to your Full Text Finder account. For the non-EBSCO resources we will do an initial scan of your electronic resources and create a source sheet. To complete your institution’s holdings you will need to provide a holdings file to assist with loading the appropriate titles.

If you would prefer to stay with your current knowledge base provider, you are welcome to do so. In this case, an EBSCO representative will provide you with instructions to export your holdings to EBSCO for loading to a local collection in your EDS profile.

Other relevant resources:
- Full Text Finder - Welcome Kit for Administrators
- Holdings Management - Uploading Your Holdings
- What is the "Available in Library Collection" limiter in EBSCO Discovery Service?
- Setting up the Available in Library Collection limiter for Serial Solutions & SFX Customers

Implementing Link Resolvers / Custom Links

A link resolver is software that accepts properly formed OpenURL data and uses it to direct users to a known item. It is configured by an administrator to check access to the item and provide the options for accessing it. EBSCO’s link resolver product is called Full Text Finder, although there are several different link resolver products available.
**Full Text Finder**

The *Full Text Finder* link resolver is a vendor-neutral OpenURL compliant. Your library may already have an OpenURL resolver, and EDS will work with your current resolver. However, if you do not have one, setting up *Full Text Finder* will enable you to leverage the power of your custom EDS Knowledge Base (the knowledge of a library’s complete holdings) to seamlessly connect researchers from an EDS record to the corresponding full text of an article/item that is not available in full-text directly through EDS, but is available by your library.

If you are new to *Full Text Finder*, your Project Coordinator will review your account to ensure that it is properly implemented. For more information, please see the *Full Text Finder Link Resolver Administrator Set-Up and User Guide*.

**CustomLinks**

As a service to our customers, EBSCO has created a library of preformatted links called *CustomLinks*. When a customer knows they have access, either because the item is Open Access, or because they have subscribed to the resource, a CustomLink can be enabled in EBSCOadmin to take users from the record to the item.

For appropriate Partner Databases, we create and make available a CustomLink which can be accessed and enabled through EBSCOadmin or by contacting eds@ebscohost.com. We highly recommend using *CustomLinks* to access Partner Databases since our links take advantage of a publisher-provided linking solution which is the most reliable method of directing users to the full text. If you have a link resolver you may opt to display it instead of, or in addition to, the CustomLink.

Other relevant resources:

- *CustomLinks - Frequently Asked Questions*
- *Ranking CustomLinks in EDS*
- *CustomLinks Best Practices Guide*
- *What fields can CustomLinks utilize?*

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**Setting up your EBSCOhost Integrated Search (EHIS) Connectors**

EBSCOhost Integrated Search (EHIS) allows you to include content that is not part of any collection or index hosted by EBSCO. Your initial evaluation of EDS likely included making a list of the resources that your sales representative indicated are not a part of the EDS index, so now that you have purchased EDS, you may wish to revisit this list to make sure that it includes all of the resources you would like to search in your EDS profile.
Our implementation team will begin work on adding your EHIS connectors. Depending on the vendor, we may need you to assist in the set-up process, as some vendors prefer to communicate directly with their customers, rather than with EBSCO. We will notify you if this is the case, and what information we need you to provide. Please note that response time from vendors can vary, so it is important to watch for prompts from the Discover Solutions team.

Other relevant resources:
- When running a search on EBSCO Discovery Service with EHIS, how are Integrated Search connectors treated?
- How do I set Integrated Search connectors to not automatically be searched on my EBSCO Discovery Service profile?
- EBSCOhost Integrated Search - Configuration Best Practices Guide
- Will the simultaneous user limit still apply when I'm searching in EBSCO Discovery Service (EDS)?

More Customization Options

After the initial setup of your EBSCO Discovery Service is complete, you may take several other steps as an administrator as you implement EDS for your institution.

Suggestions for Customization

- **Search Box** – Search boxes can be implemented into your institutions overall web experience to search EDS, your institutions catalog, institutional repositories and external resources configured with EBSCOhost Integrated Search.

- **Discipline Limited Search** – This limiter enables users to narrow searches by subject-like disciplines to improve the precision of their searches. This limiter can be accessed directly from the Basic or Advanced Search pages in EDS, or from a search box on your library's website.

- **Subject-Specific Profiles** – Create EBSCO Discovery Service profiles that contain databases specific to certain subjects, allowing the user to filter search results they are not interested in before even beginning a search.

- **Apps (Widgets)** – Apps (formerly known as Widgets) allow you to add additional functionality to the EDS result list and detailed record page. (For example, user generated content, RSS Feeds, Instant Messaging, and search related support material.) Click [here](https://help.ebsco.com/interfaces/EBSCO_Discovery_Service/EDS_Best_Practices/EDS_Setup_Best_Practices_Guide), for more information on Apps.

- **Guest Access** – A guest access entry point lets users search all materials that belong to the institution, including catalog results.
Review

After your initial EDS setup is complete, there are a few items you may consider reviewing to further customize your Discovery Solution.

The following are some items you may wish to review prior to your full Discovery launch:

1. **Branding** - Are your interface colors, custom logos, and toolbar options displaying to your liking?

2. **CustomLinks** - If CustomLinks have been set up for your EDS account, ensure they are working properly and directing users to the appropriate results.

3. **Search Boxes** - If you are using search boxes to allow users to search from your home page, are they authenticating properly or are allowing guest access (if enabled)?

4. **Apps (Widgets)** - Check any configured Detailed Record or Result List apps to ensure they are delivering the appropriate content and displaying correctly.

5. **Catalog Items** - Check to make sure your catalog items are appearing as you would like users to see them. If Real-Time Availability Check is implemented, ensure that the Real-Time information is appearing for your catalog items.

6. **Custom limiters** - Are your EDS-specific limiters displaying in your preferred order? Verify the Location and Collection limiters are appearing as you wish to see them.

7. **Guest Access** - To confirm that Guest Access is working properly, test your Guest Access link to EDS: http://search.ebscohost.com/login.aspx?authtype=guest&custid=XXXXX&groupid=main where XXXXX is your site-specific Customer ID. In order for Guest Access to work properly, you must ensure that your proxy server is configured with the appropriate IP address in EBSCOadmin.

8. **ILL Link** - ILL Forms allow users to request an item from your institution by clicking an ILL link in the result list or detailed record of the item. EBSCOadmin allows administrators to create ILL forms for EBSCOhost and EDS
profiles. The following Help Sheet describes how to create an ILL CustomLink and customize your ILL request form: Creating an Inter-Library Loan (ILL) Form - Help Sheet.

9. **EBSCOhost Integrated Search Connectors** - Are you satisfied with the order of your Integrated Search connectors? If you have any customized labels, are they appearing correctly?

**Note**: Users should not be prompted for authentication when they click an EHIS connector.

10. **Result List**: Double-check your Result List settings. Any last minute customizations?
    - Default number of results per page.
    - Standard View.
    - Check the order of the Facets in the left column.
    - Should any Facets be defaulted to open?
    - Customize the text of the labels on the Result List.

Once you have reviewed these items, you may wish to invite a group of users to test-drive your Discovery Solution and solicit their input and feedback prior to your full launch.

User Demonstration and Feedback

Host a demonstration session to gather user input and feedback as you consider additional customization prior to your Discovery Solution launch.

**Suggested Duration:**
45 Minutes

**Invite Participants:**
Consider recruiting 8-10 participants. A mixture of users with some suggested characteristics below is recommended:

- Users who are not familiar with EBSCO.
- Users who define themselves as savvy/expert searchers.
- Users who do not define themselves as savvy/expert searchers.
- Users who do not use online/library databases to conduct research.

**Offer Incentives:**
Consider offering incentives to encourage participation.

- Incentives could be gift cards or cash (monetary value ranged from $10 to $20), for example.
- Serving lunch or snacks is another suggested incentive.
Plan a User Demonstration:

• Create a list of key features to demonstrate to your users.
• Create a list of scenarios/tasks you wish your users to complete.
• Conduct a walkthrough of the demonstration.
• Book a room to hold your demonstration.
• Ensure the equipment to be used for the demonstration is working properly.

Day of Demonstration:

• Print out the scenarios/tasks so that user has them readily available to review.
• Print out copies of your scenarios/tasks so that moderator and facilitator can follow along.
• Consider administering a post-test questionnaire to participants after the demonstration is complete to gather user comments/feedback. The following are some sample questions you may wish to ask:
  1. How would you use this Discovery Solution in your research?
  2. What do you like/dislike about this Discovery Solution?
  3. Would any changes make it easier for you to find relevant results?
  4. Is this Discovery Solution easier to use than this institution’s current/former research tools?

Note: If you have software resources available to you to do so, such as Camtasia, Morae, or WebEx, you may wish to record user activity during the demonstration to gather additional feedback.

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