EBSCO Discovery Service (EDS) Best Practices Guide - Customization

Overview

*EBSCO Discovery Service* (EDS) is a rich environment that offers users a search experience incorporating all of your resources into a powerful interface. Tailoring the experience to meet your institution’s needs, and monitoring those needs over time, is essential to obtaining maximum value.

Using EBSCOadmin, administrators can customize the functionality of *EBSCO Discovery Service* (EDS) to meet the needs of users. For example, you can find controls to limit search results to only items that are available in your library collection, or provide options to enable users to narrow searches by subject-like disciplines, improving the precision of their searches.

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This guide will discuss several of the customization options available for EDS profiles, offering suggestions that help you leverage the power of EDS.

For step-by-step instructions on customizing and branding your EDS profile, consult the *EBSCO Discovery Service Customization Admin User Guide*

For related guides visit the EDS Support page.

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Setting Limiters

Limiters allow users narrow the focus of their searches so that the information retrieved from the databases being searched is limited according to the selected values.

On the result list, you can select three limiters to display under the Refine your Results facet without needing to select the Show More link. EBSCO recommends the following limiter order:

- **Full Text (Online)** – Limit results to articles with full text available from databases, custom links, and local collections.

- **Scholarly (Peer Reviewed) Journals** – Limits search results to articles from peer-reviewed journals. Peer-reviewed journals are publications that include only those articles that have been reviewed and/or qualified by a selected panel of acknowledged experts in the field of study covered by the journal.

- **Available in Library Collection** – Limits search results to records whose full text is available online (via EBSCOhost full text databases, e-journals, institutional repositories, data partners, etc.) or content physically available in your library.

- **Catalog Only** – Limits EDS search results to only those items in your institution’s catalog, regardless of circulation status.

The names for these limiters are customizable and may be called something different on your EDS interface. Library administrators can also elect to make certain limiters (or expanders) part of the default search.

*Here are some examples of how Refine your results limiters might be customized:*
Enabling & Configuring Discipline-Limited Search

Discipline-Limited Search is a limiter available in EDS profiles that 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.

The limiter must be turned on by a library administrator, who can select which disciplines are displayed for a given profile. The list of available disciplines is defined by EBSCO.

The Discipline-Limited Search feature can be used as an alternative to, or in tandem with, subject-specific EDS profiles (see next section).

Notes:

- The list of terms is non-hierarchical and, as a limiter, using this feature will reduce the number of results returned for your search terms to items whose titles have been assigned to your selected disciplines.

- Discipline-Limited Search is currently in Beta as EBSCO works to enhance and refine the availability of disciplines and the associated content.
Creating Subject-Specific Profiles

You can create *EBSCO Discovery Service* profiles that contain databases specific to certain subjects using EBSCOadmin. This is a useful tool for assisting users with limiting searches to subject areas of particular interest or importance to your community, while retaining the option to search your entire library with the primary EDS configuration.

For instructions on how to create subject-specific profiles in EDS, see this Help Sheet: [EBSCO Discovery Service (EDS) - Creating Subject-Specific Profiles Help Sheet](https://help.ebsco.com/interfaces/EBSCO_Discovery_Service/EDS_Best_Practices/EDS_Customization_Best_Practices_Guide).

Subject-Specific Search Box

Once you have created a subject-specific profile, you can use custom code to create a search. This is a useful tool for enabling searching from particular pages in your institution's website. You can choose to default the search box to target a specific subject profile, or offer a dropdown menu for users to select the appropriate subject. The EBSCO Support Site provides a text file that includes custom code that you can modify to meet your specific needs. Included are instructions to help you customize the code for your search box.

For example, the University of Liverpool has created a number of Subject Guides where users can go to search subject-specific resources. The following tabbed EDS Search Box appears on the University's Environmental Science subject page:

![Subject-Specific Search Box Example](https://help.ebsco.com/interfaces/EBSCO_Discovery_Service/EDS_Best_Practices/EDS_Customization_Best_Practices_Guide)

This subject-specific search box sifts through databases that have been assigned to the Science & Engineering EDS profile, including EBSCOhost research databases such as *Computers & Applied Sciences Complete*, *Environment Complete*, and *GreenFILE*, as well as EDS Partner Databases such as *GeoRef*, *JSTOR*, *ScienceDirect*, and *TEMA*. Users can click the second tab to search all of EDS.

The University of Liverpool also created subject-specific EDS profiles for the Humanities, Social Sciences, and Health and Life Sciences. These subject pages also feature their own subject-specific search boxes.

For the HTML code to create a subject-specific search box, see this Support FAQ: [How can I create a subject-specific search box for my institution's web site?](https://help.ebsco.com/interfaces/EBSCO_Discovery_Service/EDS_Best_Practices/EDS_Customization_Best_Practices_Guide).

Bottom Branding

If you are using bottom branding on your EDS home page, you may also wish to add code that will link your users to the subject-specific profiles you have created.

The following are examples of ways to display links to subject-specific profiles in your bottom branding:

**Overlake Medical Center – Bellevue, Washington**
This hospital chose to include buttons that link users to its subject-specific EDS profiles.

**University of Massachusetts – Lowell, Massachusetts**
UMass Lowell chose to include hypertext links to its subject-specific EDS profiles.

**Life Technologies – Carlsbad, California**
Life Technologies created two subject-specific EDS profiles – one for its Scientific Research Collection, and one for its Business & Finance Collection. The buttons on the left link users to an advanced search screen that searches only the resources assigned to the collection chosen. In addition, users can click on links to saved searches that will launch a page of results that can be browsed or narrowed further.
Managing New Database Subscriptions and Product Offerings

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. Types of Partner Content include Open Access Resources, Subscription-Based Resources, and Partner Catalogs and Indexes.

EBSCOadmin allows administrators to prevent new content, subscriptions, or product offering additions from automatically being added to profiles. This is useful if you prefer to control the content added to your profile, limiting it based on your local institution’s criteria (e.g. access to the content, language, publisher, etc.). Currently, this setting is No by default for both main EDS system generated profiles and custom profiles created by administrators. This allows you to customize the content added to those profiles.

To enable automatic addition of new content:

1. Click the Customize Services Tab.
2. From the Choose Profile drop-down list, select the profile you wish to modify.
3. Click the Databases sub-tab.
4. Set the New Content Automatically Enabled parameter to Yes.
5. Click Submit to save your changes.
Link Order & Ranking CustomLinks

A key goal of any discovery service is to help users get to the full text of content in your institutions holdings, as seamlessly as possible. The tool to help you do this with EDS is CustomLinks.

Because the reliability and accuracy of links can vary, it is important to think about the order of your CustomLinks. Link Resolvers and other Full Text CustomLinks utilize OpenURL technology, so records may not have the data structure to pass the user to the content quite as seamlessly as EBSCOhost Full Text CustomLinks. This is because the EBSCOhost Full Text (PDF Full Text or HTML Full Text) option links records in EDS to Full Text that is contained within the EBSCOhost content family. Because we are linking within our own data set, the reliability of these links is extremely high.

EDS-specific CustomLinks are also reliable because EBSCO has worked with the publisher to ensure that our links work as accurately as possible with the target records. All of these CustomLinks are labeled with “EDS” in EBSCOadmin.

EBSCOadmin allows administrators to customize the order of the Full Text links that appear on the EDS result list. If, for example, you would like a specific CustomLink to appear before EBSCOhost Full Text, the link order can be adjusted to display accordingly. The recommended link order below is designed to optimize the search experience for end users by presenting the most seamless option first.

**Recommended link order:**
0 - Linked Full Text
0 – Publisher CustomLink
0 – Publisher CustomLink
0 – Publisher CustomLink
0 – Publisher CustomLink
2 – EDS Partner Database
2 – EDS Partner Database
3 – EDS Partner Database
4 – EDS Partner Database
99 – EBSCOhost Full Text (PDF Full Text or HTML Full Text)
100 (or higher) - Your link resolver

When you add a new CustomLink, it is placed at the end of the list. To facilitate the management, we recommend leaving space in your sequence to allow for more CustomLinks to be added in the future, as the content in EDS expands.

Notes:

- Depending on how you configure your institution's Available in Library Collection Limiter you may need to create two versions of your link resolver *CustomLink*. For more information please see this Support FAQ: [Configuring your link resolver to display for all records in EBSCO Discovery Service (EDS)](https://help.ebsco.com/interfaces/EBSCO_Discovery_Service/EDS_Best_Practices/EDS_Customization_Best_Practices_Guide).

- When you add a new *CustomLink*, it is automatically placed at the end of the list. We recommend leaving space in your sequence to allow for more *CustomLinks* to be added in the future.

**Customizing Boolean Operators**

To improve searches for known titles and phrases, you may wish to customize your EDS profiles to handle the words and, or, not as Boolean Operators only when they are entered as all capital letters (AND, OR, NOT.)

We recommend that an administrator modify this setting to ensure that users who are searching for titles or phrases not enclosed in quotations and include these words will not receive poor or zero results.

For example:

- In the phrase "to be or not to be," or and not would be treated as Boolean Operators and impact the search results. When this EBSCOadmin setting is enabled, or and not are treated as part of the phrase and not as Booleans because they were not entered in capital letters.

- If a user searches for the book title "Death be not Proud," not is treated as a Boolean Operator causing the book to be excluded from the result list. When this EBSCOadmin setting is enabled, not is treated as part of the phrase and the title is included in the result list.

To modify this setting in EBSCOadmin:

2. Choose the desired EDS profile from the Choose Profile drop-down menu.
3. On the Searching sub-tab, set Require uppercase Boolean operators (AND, OR, NOT) to Yes.
4. Click Submit to save your changes.
Adding Apps (Widgets)

Apps (formerly known as Widgets) allow library administrators to add functionality to their EDS search results and detailed record screens. Apps allow you to display dynamic results from external sources (e.g. Flickr, YouTube), provide customized content or messages for your users, or point to important resources you want your users to know are available. Apps may be added as either iFrame URLs or custom HTML code.

For example, you can add:

- Google Scholar
- WorldCat Search
- Flickr Photo Sharing
- Goodreads Book Recommendations
- Google Books
- YouTube
- LibGuides
- Ask a Librarian
- Custom survey

There are two ways to find apps to enhance your experience. If you would like assistance customizing your EDS experience, visit the EDS Apps & Cloud Services web site. Here you can see examples of apps and place an order for the code. The ordering process allows you to either select to install the app yourself, or upgrade to EBSCO Cloud Services, which offers a full service experience for updating and maintaining all of your apps.

Alternatively, you can visit the EDS App Library on the EDS Wiki. The EDS Wiki is a community site for customers of EDS. Apps found here were created by customers or Discovery Service Engineers and contain the instructions and code necessary for implementation. You can access the EDS Wiki at http://edswiki.ebscohost.com/.

The following are popular Apps (Widgets) to include on your EDS search results page:

**LibGuides App (Widget)**

LibGuides, also called Subject Guides or Research Guides, are librarian-created web pages that list recommended resources for finding information – such as databases, journals, books, and web sites – that are relevant to a patron’s area of study. A LibGuides App will allow you to direct your users to these important resources.
Ask-A-Librarian App (Widget)

Provide virtual reference assistance to your users with an Ask-A-Librarian chat window.

Custom Survey App (Widget)

This simple app allows library staff to prompt users to take a survey. Initiating the survey can either launch a new browser tab, or launch the survey in a new browser window. The app can link to any web based survey.

University of Prince Edward Island – Charlottetown, PEI, Canada

The Robertson Library’s EDS search results page features two apps. The “Library ASK US” box allows patrons to chat live with a reference librarian, while the survey app prompts patrons to share their feedback about EDS, which is known at PEI as “OneSearch.”

Still Need Help?

You can reach EBSCO technical support by calling 800-758-5995 or by emailing support@ebsco.com. You can also visit the EBSCO Support Site at http://support.ebsco.com/.