EBSCO Discovery Service (EDS) Best Practices Guide – Maintaining EDS

Overview

This guide is designed to assist institution administrators who would like to learn more about maintaining EBSCO Discovery Service (EDS) and identify the steps to keeping your discovery tool an efficient searching resource. We will review key topics such as updating your catalog, reviewing content currently searched, updating linking to full text, and creating widgets.

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.

For related guides visit the EDS Support page.

Download: EDS Maintenance Keys

Topics covered in this guide include:

- Interface Usage Report
- Customizations of EDS
  - Setting Limiters
  - Managing Content
- CustomLinks
  - Updating your Knowledge Base and Link Resolver
- Catalog Updates
  - Catalog Status Notification
  - Location Look Up Table
- Subject-Specific Versions of EDS
  - Discipline-Limited Search
  - Subject-Specific Search Box
  - Bottom Branding
- Adding Apps (Widgets)
- Training
Interface Usage Report

The Interface Usage Report provides you with a quick snapshot of how frequently your patrons are using EDS, or any selected interface, by counting the number of sessions, searches, and requests logged against a profile. The number of Total Full Text and CustomLink Requests can provide you with valuable insight into how you might refine your EDS profile to increase the visibility of certain items in your library collection.

For step-by-step instructions on running your EDS Usage reports please see the following FAQ: EBSCO Discovery Service - Understanding Reports & Statistics Reference Guide

If you are interested in how many times a user clicked the Search button, you can request a Search Click Report from EBSCO Technical Support.

Customizations of EDS

Explore the customer examples on the EDS Wiki to see live examples of EDS implementations. Seeing how other customers have implemented the service can help you decide how to customize your instance of EDS, such as enabling Guest Access, personalizing facets, or adding Bottom Branding.

Other relevant resources:
- What is EBSCO Discovery Service Guest Access and how do I enable it for users?
- EBSCO Discovery Service Best Practices Guide - Branding
- Can I display subject facets on the Result List?
- How do I customize the Content Provider label for my EDS profile?

Setting Limiters

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

In order to make your library's subscription content more discoverable in EDS, you may wish to enable the Available in Library Collection Limiter by default.

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

The names of your limiters are customizable, and you may choose to call these limiters something different on your EDS interface.
For instructions on how to customize the limiters that appear under your Refine Results facet, see the following Support FAQ: How do I customize which limiters appear under Refine my Results on my result list?

Other relevant resources:
- EBSCO Discovery Service Best Practices Guide - Customization
- How do I make my library’s subscription content more discoverable in EDS?

Managing Content

EBSCOadmin allows you considerable control over the content you add to your EDS profile, such as new EDS Partner databases or new EBSCO subscriptions.

The Content Automatically Enabled Setting allows you to configure your profile to automatically add any new partner content that is available for all EDS customers. Currently, this setting is "No" by default for both main EDS system-generated profiles and custom profiles created by administrators.

Keep in mind that managing new content for EDS Partner databases is generally a two-step process.

1. Add the database to your profile (if you have not enabled automatic additions).
2. Then, if the database requires EBSCO to link to the publisher for full-text content, you need to add the appropriate CustomLink. Click here for instructions on adding a CustomLink to a Partner database.

Other relevant resources:
- Managing your content in EBSCO Discovery Service
- EDS Partner Database Information and Spreadsheet on the EDS Wiki

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**CustomLinks**

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

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 publisher’s CustomLink to appear before the EBSCOhost Full Text, the link order can be adjusted to display accordingly.

For instructions on how to reorder your CustomLinks, see this Support FAQ: Ranking CustomLinks in EBSCO Discovery Service. For best practices and use cases for setting up CustomLinks, See CustomLinks - Best Practices Guide.

Updating your Knowledge Base and Link Resolver
We can configure your EDS to display links to your link resolver for those titles your library holds in full text. This allows us to also flag these results as full text when users click the "Full Text" or "Available in Library Collection" limiters. In order to do so, EBSCO will need to work with you to ensure that we always have up-to-date information on what your library holds in full text. For Full Text Finder users, you will need to maintain your library’s holdings in EBSCOadmin's Holdings Management. For third-party link resolvers, we will need you to provide a full-text journal holdings file and create a local collection. For assistance, please contact EBSCO Technical Support.

Other relevant resources:

- How do I display links to full-text journal/book holdings when using EBSCO Discovery Service?
- Available in Library Collection limiter for Serial Solutions & SFX Customers
- Holdings Management for Full Text Finder

Catalog Updates

To ensure that your catalog data in EDS matches the data in your OPAC, you should look at how often you are updating your catalog in EDS. Records can be uploaded via EBSCO’s FTP server or, if your ILS vendor supports OAI-PMH harvesting, then we would likely be able to set up an automated catalog update and remove any manual steps.

If your ILS vendor supports an automated export of OPAC records, then it may be possible to set up an automated script to capture the export and send it to our FTP site seamlessly. Please work with you ILS vendor on setting up this process.

You may update your MARC records on our FTP site as frequently as once per day. Depending on the size of your file, it may take 1-2 business days before updates are reflected in your catalog database.

Other relevant resources:

- Using FTP to Create and Maintain Records in your EBSCO Discovery Service Custom Catalog Database
- Using OAI-PMH to Create and Maintain Records in your EBSCO Discovery Service Custom Catalog Database
- Getting started with an FTP Client for Custom Catalogs and Institutional Repositories
- Check out the frequency of other EDS Customers catalog holdings updates on the EDS Wiki

Catalog Status Notification

You can check your catalog update status by clicking the Site/Group Maintenance link in EBSCOadmin. Here you can view the catalog status or set up email configuration to be notified when your catalog is updated. Different views will allow you to see Any Status, Success Only, or Failures Only for your data files that were received and/or processed.

Location Lookup Table
A location lookup table is used to create catalog location limiters specific to your institution based on the location information coded in your MARC data. The location lookup table also translates location codes in your data to create facets in the EDS Results List.

To add, update, or delete locations showing for your catalog records in EDS, you will need to request an update to your EDS Custom Catalog Database by contacting Support with your new location lookup table information.

- **EBSCO Discovery Service - Custom Catalog Location Lookup Table Overview**
- **Requesting updates to your EBSCO Discovery Service Custom Catalog Database**

**Subject-Specific Versions of EDS**

Using EBSCOadmin, you can create EDS profiles that contain databases specific to certain subject areas. This allows users to limit searches to subjects of particular interest or importance to your community, while retaining the option to search your entire library collection with the primary EDS configuration.

For instructions on how to create subject-specific profiles in EDS, see this Help Sheet: **EBSCO Discovery Service - Creating Subject-Specific Profiles Help Sheet**.

**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.

**EBSCO Discovery Service - Configuring Discipline Limited Searching Help Sheet**

**Subject-Specific Search Box**

Once you have created a subject-specific profile, you can use custom code to create a search box that points to it. 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 drop-down 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.

**Other relevant resources:**

- **How can I create a subject-specific search box for my institution's web site?**
• Search Box Builder

**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.

For the HTML code that will link users to your subject-specific EDS profiles, see this Support FAQ: [What is the code needed to add links to subject-specific profiles in my bottom branding of EBSCO Discovery Service?](https://help.ebsco.com/interfaces/EBSCO_Discovery_Service/EDS_Best_Practices/EDS_Maintenance_Best_Practices_Guide)

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**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.

*Other relevant resources:*


The following are popular Apps to include on your EDS search results page, click on the links below for detailed instructions:


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**Training**

Online training is available on a variety of topics, including live and recorded sessions on Revisiting Your Discovery Tool. [Click here](https://help.ebsco.com/interfaces/EBSCO_Discovery_Service/EDS_Best_Practices/EDS_Maintenance_Best_Practices_Guide) for more information.

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Further Support

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.