EDS Account Review Summary: Descriptions of Quality Assurance (QA) Categories

The following describes each evaluation category, the components evaluated by the technical representative, and the outcomes that affect QA status.

Branding & Customization

Branding & Customization focuses on the customizable interface components of a customer’s EDS profile, including branding, toolbar modifications, and—if applicable—language settings. In the Branding evaluation, we ensure the following:

1. The EDS profile displays the customer’s personal color scheme and institutional logo(s).
2. There are no broken or distorted images on the Basic Search and Result List pages.
3. Customized text in places such as the Toolbar, the “Searching” label, Detailed Record, Facets, and Related Items are accurate and readable.
4. The text or logo in the top right corner of the Result List is properly hyperlinked.

If any of these components do not meet expectations, the customer’s EDS profile will not pass the Branding & Customization evaluation.

*Note:* When reviewing the Toolbar, we also verify that (1) each link on the toolbar does not produce an error page, and (2) that each link directs to a page that reflects the label. If a URL is broken or misdirects to the wrong page, the customer’s EDS profile will not pass the Branding & Customization evaluation.

Finally, if the customer is defaulted to a language other than English, language settings are evaluated. We follow a checklist based on different aspects of the interface to ensure proper language translation has been applied. If certain aspects are not translated, we will attempt to fix the item(s) and will make note of the changes in the Account Changes portion of this document. If we are unable to resolve the issue(s), the EDS profile will not pass the Branding & Customization evaluation.

Interface Functionality

Interface Functionality focuses on particular features in the EDS interface that deliver content such as limiters, widgets, and—if applicable—Real Time Availability Check (RTAC).
We will review 2-4 limiters, depending on whether the customer has included a Custom Catalog and/or Institutional Repository database in their EDS profile. The first two limiters are reviewed for every customer:

1. We will conduct a keyword search with the *Full Text* limiter enabled and review the first 100 results to ensure that each result displays a link to full text.

2. We will conduct a keyword search with the *Available in Library Collection* limiter enabled and review the first 100 results to ensure that each result displays a link to full text or stems from the customer’s Custom Catalog (if applicable).

3. If the customer has included a Custom Catalog, we will review the *Catalog Only* limiter to verify that, when the limiter is activated, only Catalog records appear in the Result List.

4. If the customer has included an Institutional Repository, we will review the *IR Only* limiter to verify that only IR records are returned.

Widget testing involves evaluating the “look and feel” as well as the functionality of a widget. For example a widget must display correctly without any error messages in order to pass the Interface Functionality category. Additionally, any associated URLs within the widget must link correctly.

*RTAC* evaluation only occurs if a customer has a Custom Catalog. If a customer has a Custom Catalog, we will confirm that RTAC displays properly and relays correct information.

**Databases & EDS Content**

Databases & EDS Content focuses on the integration of the customer’s purchased EBSCOhost databases, EDS Partner Databases, and any EBSCOhost Integrated Search connectors.

When reviewing EBSCOhost databases, we will verify that all purchased databases are enabled on the EDS profile. Any EBSCO-purchased database not enabled on the profile will be indicated in Account Summary, and this category will be marked as “Requires Attention.” We will also make sure that no redundant databases are included in the profile as there may be a less comprehensive EDS version of a purchased database the customer owns.

When reviewing EDS Partner Databases, we will identify which Partner Databases are enabled versus disabled and ensure that all Open Access Partner Databases have a corresponding CustomLink. We will review the last time the customer completed a Partner Database Questionnaire, state how many partner databases have released since that point in time, and potentially recommend completing a new questionnaire.

When reviewing EBSCOhost Integrated Search connectors, we will verify that, when a search is performed, the connectors return results with no error messages. Additionally, we will verify that, when records are selected from the connector, the user is linked to the correct record on the third party vendor’s webpage.
**CustomLinking**

CustomLinking focuses on the “linkability” of CustomLinks for a given record, ensuring that it brings the end user to the expected page, does not produce any error messages, and displays as the customer would expect.

This category includes reviewing EDS CustomLinks, secondary CustomLinks (e.g. “SAGE” or IEEE Xplore), and Custom Catalog/IR CustomLinks to ensure expected access to records. When reviewing each kind of CustomLink, we will run various searches and test 10-15 different results per CustomLink. We will verify the link brings the user to the article level of the same record on the third-party vendor’s webpage.

**Full Text Finder**

For Full Text Finder customers, the evaluation focuses on the numerous account settings inside of the customer's Holdings Management as well as a review of the configuration of the Full Text Finder resolver and its functionality within the EDS interface. In this evaluation, we will ensure the following:

1. All EBSCO and non-EBSCO (if known and made available) resources are properly loaded and integrated into Holdings Management and provide optimal linking.
2. Full Text Finder end-user sites are branded with the same or similar color schemes and logos as their EBSCO Discovery Service profile.
3. Integrity of CustomLinks: If third-party resources have been added to Holdings Management, we will perform 10 searches within EDS that incorporate various subjects and packages based on the customer's overall Holdings Management. For each search, we will test 10 records. If the link is successful, it will bring the end user to the appropriate target level. If the link does not bring the user to its target page, the evaluation of the Full Text Finder resolver category will be marked as “Requires Attention.”

*Note:* If the account undergoing QA is an existing customer, the only changes that will be made are those impacting the functionality of Full Text Finder and LinkSource. Otherwise, account calibration recommendations will be provided to the customer before changes are applied to the account.

**Third-Party Link Resolver (For Non-Full Text Finder Customers)**

If the customer uses a third-party link resolver, we will perform a similar evaluation to CustomLinking where we execute a variety of searches, isolate records that display the customer’s link resolver CustomLink, and, whenever possible, test the linkability; we will test 10-15 different records that display the link resolver CustomLink.

*Note:* An EBSCO technical representative can only verify that your link resolver is set up correctly within EBSCOadmin. Any linking or set-up issues that are outside of EBSCO’s control will need to be reviewed by your provider. Therefore, we may recommend that you contact your provider to evaluate your link resolver and knowledge base separately.
Custom Catalog

The Custom Catalog QA is a comprehensive review of the initial build of a Custom Catalog database. During this phase, we perform a variety of tests to ensure the catalog’s total functionality.

The first of these tests is to ensure records were loaded properly, the various limiters are functional, and that the database’s back-end parameters are correctly set up. During this test, we will also check to ensure that the OPAC CustomLink (if applicable) and Export features are functional. We also run a number of sample searches in the catalog database to ensure that that the records are sorting and display correctly.

The second test is a visual citation check, wherein we ensure that Holdings were loaded properly and that all of the data fields visible in the detailed record page have been loaded properly. This is done both by a visual check of sample records and by testing the database on the back end.

The third test is a specific test to ensure that the various fields from the data uploaded to our FTP were processed properly and all MARC fields are properly mapped to the equivalent EBSCO database fields. This test also includes checks to ensure that customer-defined fields such as eBooks, Audiobooks, and 856 link handling are all set up and mapped according to the customer specifications.

If discrepancies, errors, or incorrect data are discovered in any of the above, these will be noted and passed along to the designer who will then notify the customer and/or EBSCO contact if necessary. Once any errors are corrected, we will then perform targeted testing to ensure proper functionality is in place.

When a catalog has passed all tests and results have been verified by the catalog designer, it will then be sent for its build to the live EDS site and added to the customer’s profile.

Institutional Repository

The Institutional Repository QA is a comprehensive review of the initial build of an Institutional Repository database. During QA, we perform a variety of tests to ensure the IR’s total functionality.

The first of these tests ensures that records were harvested properly, and that all data fields (Ex: Dublin Core, METS, etc.) are mapped to the equivalent EBSCO database field. This is done both by a visual check of sample records and by testing the database on the back-end.

The second test checks that the links to full-text images/text/documents are functional. If the links are not functional, QA notifies the designer and requests that they attempt to construct a URL based on the data available in the record.
The third test verifies that the various back-end parameters are correctly setup, such as limiters and full-text searching. We also run a number of sample searches in the IR database to ensure that the records are sorting and displaying correctly.

If discrepancies, errors, or incorrect data are discovered in any of the above, these will be noted and passed along to the designer for correction. Once any errors are corrected, QA will perform targeted testing to ensure proper functionality is in place. When an Institutional Repository has passed QA and the results have been reviewed by the designer, the IR database is built to the live EDS site. Customer Satisfaction is notified and adds the database to the customer’s profile. Customer satisfaction will notify the customer and/or EBSCO contact if necessary once the Institutional Repository is live.

See also:

EDS Account Review Summary: QA Status Definitions