SUNY Discovery Working Group

12/18/20 @ 1:00 PM

Start time: 1:00 PM

End Time: 2:05 PM

Attendees: Nancy Babb, Pam Czaja, Michelle Eichelberger, Stephanie Hess, Jennifer Parker, Michelle Eichelberger, Heidi Webb

1. Review of December 2020 release: what are new enhancements and how are they working?
   * Utilize Mobile device QR code – have been using at UB; Turned off in prod view but have been testing/ copy-share link functionality/ bit of a learning curve; want to usually look for a permalink so you have something you can use/ embed; QR code itself is a little off-putting seems to be the stumbling block; older people might think of it as something extra; changed icon in sandbox to make it more welcoming; used CSS to replace the original copy link; Now goes to ‘Search my history; Note that if you’re hiding it in one place, it hides it everywhere so you have to be selective where/ when to have it on; plans to introduce after end of semester to avoid confusion; one campus told not to turn on this feature; NB can distribute code; NB was at a liaison meeting and one librarian expressed enthusiasm for it/ loved the idea of being able to quickly scan it and then run out to the shelves
   * Supporting resource recommender per view – has anyone here tried that? Can we import the data using other values? Controlled at the item level – possible to make a test view? Might be a limit to number of slots so can only create/ configure a few different; function has potential but some campuses only have 1 view; would be great if all three resource recommenders could be included based to keywords but that’s not the case; useful having the subject guides and librarians embedded in the search; used to catalog all of the databases but now rely solely on the Resource Recommender to put users in touch with materials / cataloging required a great deal of work so UB now doing harvesting ~~(Note: UB has about 600 cataloging entries, only 400 AtoZ database entries~~)
   * Leganto – Not applicable/ No comment
   * Enhanced Dedupe and FRBR Utility – known issue re: print/ still outstanding; test utility is the sort of things that you can use to catch errors; Use MMSID for matching – can find suppressed records; journals that have changed titles - electronic and print are merging properly if you have your dedup active; issue before because of NZ; helpful in indentifying which are matching via FRBR or Dedupe; Can verify and retrigger the calculation to test; Do we have as an FAQ? Maybe WG should draft
   * Search optimization using tags – haven’t used
   * Normalization – haven’t used
   * Central Index Templates Configuration table – new; settings that are best understood by ERL, setting up parameters, managed at the collection level but these are Link In records that need to be set up differently; If your ERL is going to manage then they need Discovery Admin privileges; UB gave one of the other ERL allows for access and editing; Exibris created a new table but didn’t get rid of the old table; Q: If you change it in the old table will the changes be made in the new table? NB to open a new ticket
   * Translation/ My Library Card/ Accessibility, etc.
   * Alma Update added ability to search holdings via Z39.50 but it’s coming through as additional 9XX fields in the bib record; A little disappointing; Which things to use for - integration, resource sharing; could use for problematic ILLiad queries; possibly kick things out to OCLC via Z39.50; If you have SerSol can already do this to expand the knowledge base to enhance/ increase ILL visibility, etc. Many using Z39.50 for record batch load; API has more functionality;
   * Re: Source ID inaccuracies, i.e. “Why is this record being included in my Primo VE results?” has been a longstanding question
2. Ex Libris developments anticipated by end of 2020 - any updates?
3. Upcoming January 2021 release
   * Allowing configuration of scopes for location; only applies if you have multiple libraries at your location
   * Hide resource sharing button based on
   * Holdings display button in GetIt – can see summary holdings to view the holdings (planned for Q1 2021 as part of the roadmap
   * Is there a Primo VE 2021 road map available yet? No announcement yet
   * Support localized links in the main menu – relates to different languages
4. Review and discussion of RACI matrix in the new ERM toolkit - consideration of a discovery-oriented matrix like this
   * Not really using on any campuses
   * SH to share BU’s draft of staff responsibility matrix based on U of Mich model (including a Google link in minutes) ETA: <https://drive.google.com/file/d/1v5rgxdXdCN6dKnfjnhHfSTnw1F1cjqyu/view?usp=sharing>
   * Could use the same schema but could include different tasks
   * What are the areas of responsibility for discovery work? What is it and who does it?
   * This SLC generated training that was targeted toward larger campuses
   * ME mentioned the training guide as another point of reference
   * Maybe this group can take a closer look at the Primo training guide and identify areas that should be included as discovery; Lot of crossover; E.g. Fulfillment rules configurations, cataloging, etc.
   * Challenges of having a larger place where tasks are divided versus having a smaller shop where one person wears many hats; E.g. Division of duties between Discovery and Fulfillment – roles should reflect that division of duties
   * Commendations/ kudos to ME for creating such great SUNY documents which are being widely used and recommended by ExLibris. See <https://slcny.libguides.com/training-primo-discovery>
5. Presentation of outstanding issues - Any issues observed locally that may be experienced SUNY-wide? Any comments on locally observed issues? tickets to discuss?
   * UB has a ticket pending re: the lag in display; demonstrated search “dog law”; lag in delay in terms of returning results; happening at UB, BU, etc. Not unmanageable and not yet being reported by end users
   * Page used to load everything at once but ExL changed trying to improve response/ load time – pages now load in parts (hence the lag)
   * Loading the different parts of the page and the system trying to load things right sequence
   * CDI is linking better to EBSCO thanks to ME; was being complicated by the Open Athens piece
   * Sounds like we’re managing OK; there are always some outstanding data issues but we are getting good feedback on our submitted tickets; ExL trying to work hard with the community; ticketing system is working well; can record problems even if not immediately resolved; SLS can also see campus tickets which is helpful

*Drafted 20201218 by S. Hess; Revised 20201231; Revised 20210106; Submitted for review 20210113*