Innovative Interfaces' Encore Duet

EBSCO Discovery Service Support Reference Guide for Administrators

Integrating *EBSCO Discovery Service* (EDS) into your library's current catalog user interface benefits patrons who are able to use a resource that they are already familiar with, for expanding searching of information resources. This guide is designed to assist Innovative Interfaces' Encore Duet administrators who have completed the initial set-up process and would like to learn more about maintaining the integration of EDS into your library catalog interface. The goal is to help you identify all of the steps to keeping your discovery tool a robust and efficient resource.

Topics covered in this guide include:

- EBSCO*admin* and your EDS profiles
- Interface Features
- Managing Content
  - EDS Partners and Publishers
  - Institutional Repository
- Knowledge Base
  - Available in Library Collection Limiter
- CustomLinks and Link Resolvers
  - Ranking your Links for Display
  - Link Authentication
- Training

EBSCO*admin* and your EDS profiles

EBSCO*admin* provides the ability to create multiple user profiles, allowing you to customize the databases, collections, limiters, expanders, search screens, and other features users see within EBSCO interfaces.

Using your library's current catalog user interface as the front-end for EDS, requires you to make all customizations on two distinct, but equally important profiles – the **EDS profile** and the **EDS API profile**.

The **EDS profile** is responsible for the display of records when a user leaves the Integrated Library Service (ILS) Interface and views a record in the EDS interface. The **EDS API profile** is responsible for the display of information in the ILS interface. It is important that updates are made to each profile to ensure a seamless user experience.

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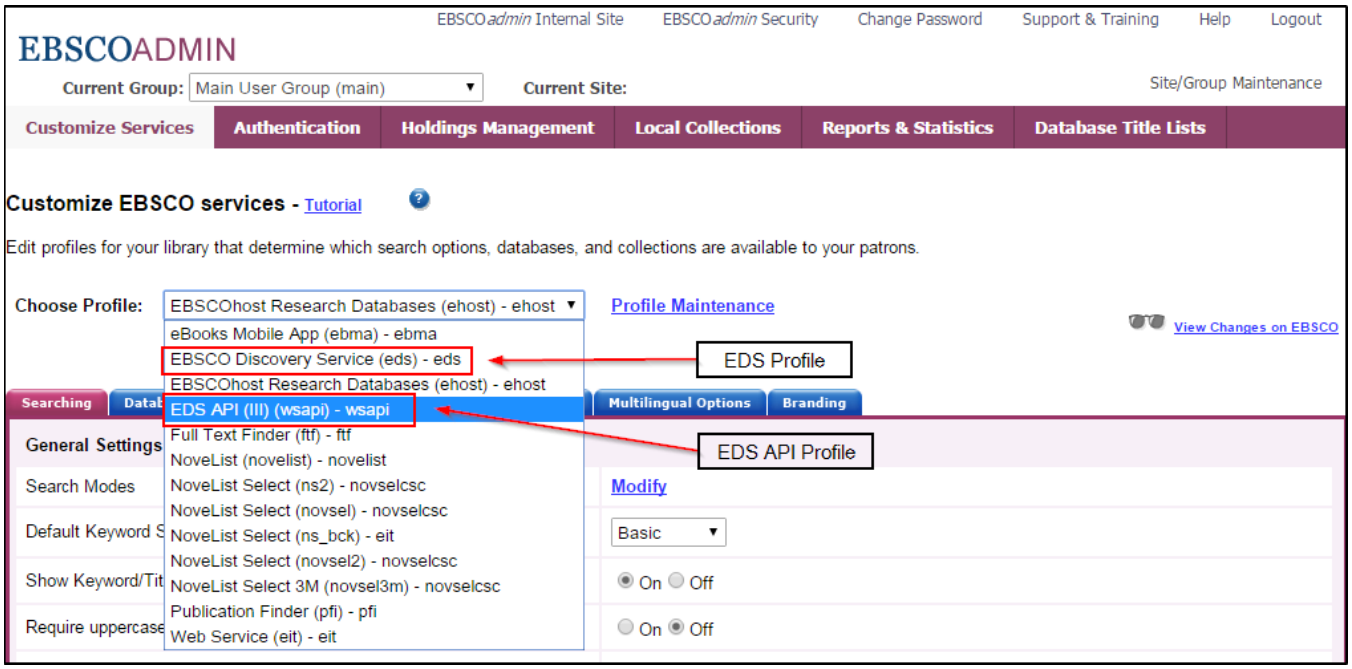
EBSCO*admin* Profiles:

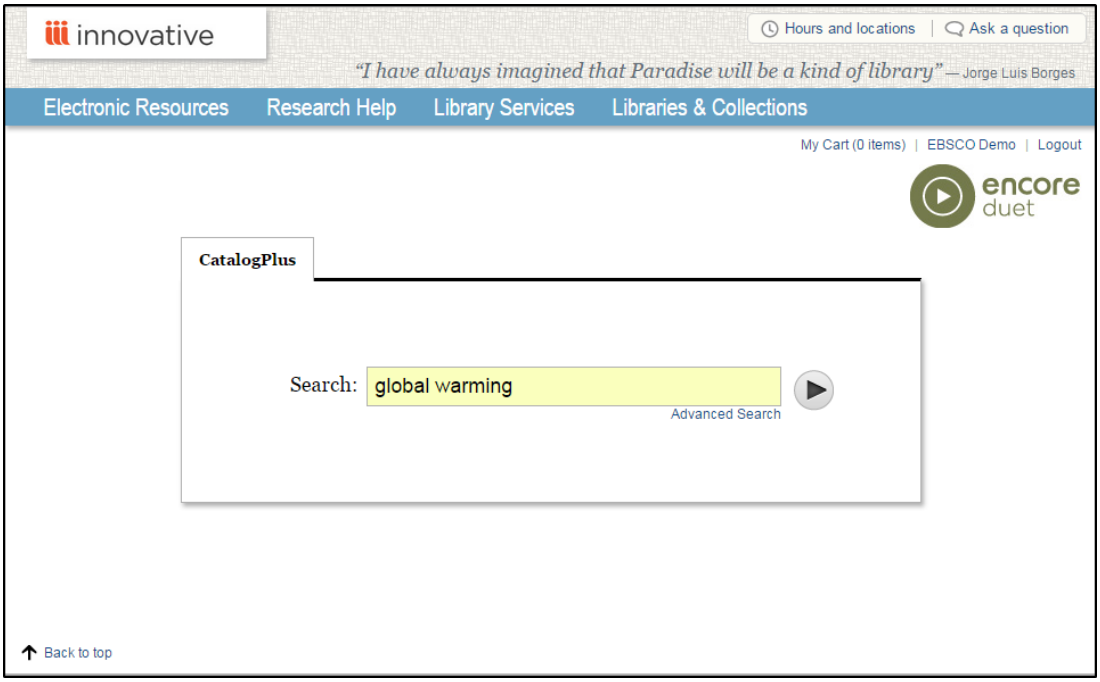


Relevant Resources:

- EBSCO Discovery Service API User Guide
- EBSCO*admin* User Guide

Interface Features

In this section we highlight which EBSCO*admin* profile is triggered when using EDS features within your library catalog interface.



Clicking the gray arrow runs a search and returns results from your **EDS API profile** and simultaneously runs a search in your Library Catalog.

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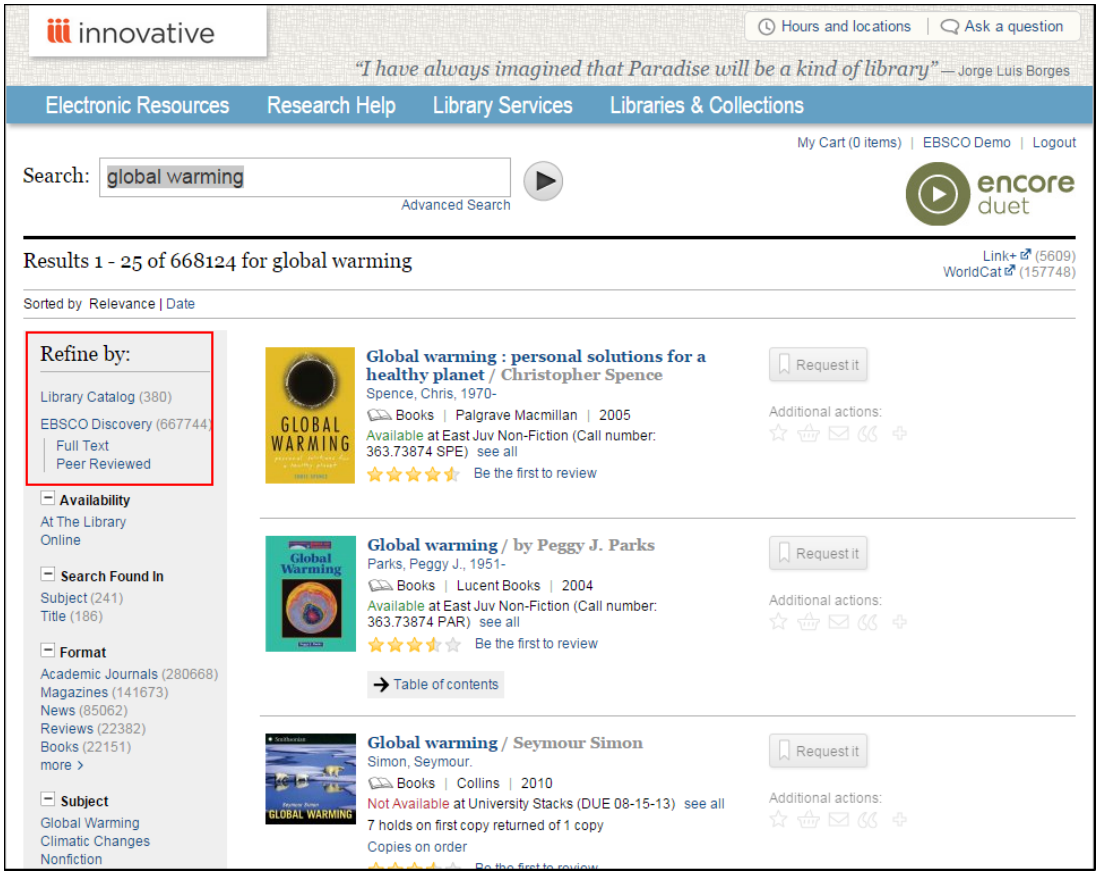
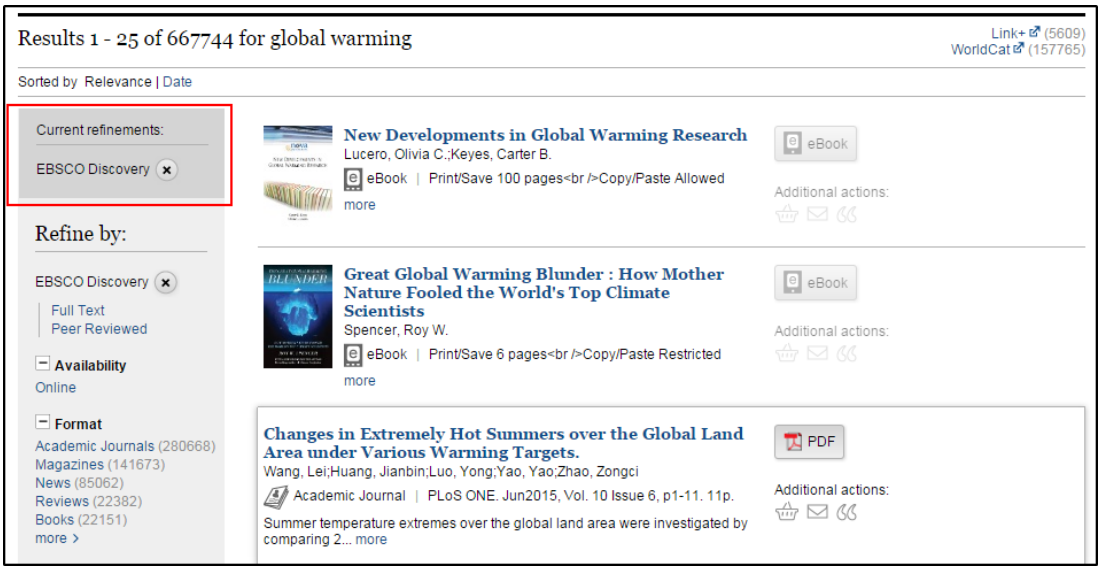


On the results screen you will see results from your Library Catalog, as well as **EDS API** results.



Using the limiters on the left panel of the results screen, you can limit to just your **EDS API** results.

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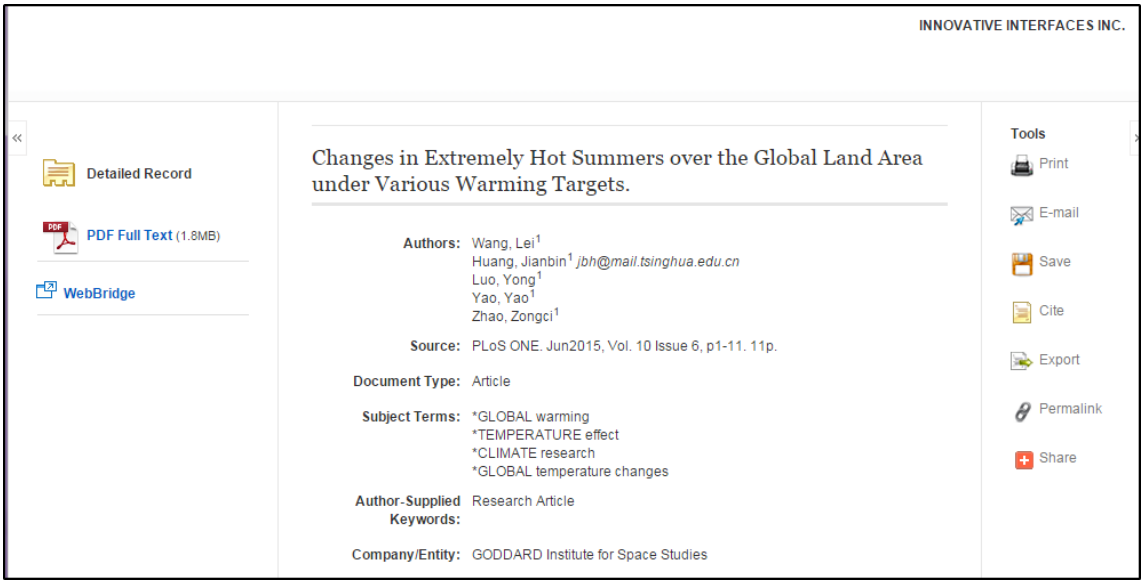

When clicking a title you are directed to your EDS Detailed Record page from your **EDS profile**.

When clicking the PDF link you are directed to the PDF Full Text page from your **EDS profile**.

Links on your EDS results are coming from your **EDS API profile**.

Managing Content

EBSCO*admin* allows you considerable control over the content you add to your profiles, such as new EDS Partner databases or new EBSCO subscriptions. It is important that the same databases and links are enabled on both your **EDS profile** and your **EDS API profile**.

The **EDS** and **EDS API profiles** should match with one exception:

- Your **EDS Profile** should have the **EBSCOhost Linked Full Text** or **EBSCOhost Full Text (PDF Full text or HTML Full text)** CustomLink – the **EDS API profile** will not. A future enhancement is scheduled to include these options on the EDS API profile.
    - These links are not available to add to the EDS API profile.
    - The API response will include the full text/full text linking information regardless of whether this CustomLink is enabled.

EBSCO Partners and Publishers

The **New Content Automatically Enabled** setting, located on the Databases tab in EBSCO*admin,* allows you to configure your profile to automatically add any new partner content that is available for all EDS customers. This is set to "No" by default for both system-generated EDS profiles and custom profiles created by administrators.

Which Partner Databases you select to add to your profile is based on the needs of your users and the expectations of your discovery service. Some customers prefer to keep all resources' metadata, regardless of full-text availability. Other customers may choose to restrict the amount of searchable content. Resources can be added or removed anytime through EBSCO*admin*.

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.

Relevant Resources:

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

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Institutional Repository
If your institutional repository, or digital archives are not searchable within your ILS already, you may wish to have them directly loaded in EDS so they 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 set-up 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.

Knowledge Base

One of the key features of Encore Duet is the ability to limit to records to which your library subscribes. To maximize the EDS experience, it is necessary that EBSCO has configured your account to accurately reflect those holdings, creating a Knowledge Base for which your library holds in full text.

In order to do this you must provide EBSCO Support with an export file of your holdings and ensure that EBSCO continually has your most up-to-date holdings information. If you have any subscriptions to EBSCO databases, journals, and/or eBooks, you do not need to provide those, as EBSCO will automatically load those holdings for you.

Once we have imported your holdings into EDS we can flag the results as full text to utilize our "Full Text" only limiter in your ILS interface, as well as display links to the items your library holds in full text. The exact process does depend on who you currently utilize for your Knowledge Base and link resolver functionality (if applicable). Please contact EBSCO Support if you have any questions regarding this process.

Available in Library Collection
Given the vast majority of content available in EDS, we recommend that customers ***enable the Available in Library Collection limiter by default*** in your EDS and EDS API profiles. By doing this, Encore Duet users will see only results that the library has access to (whether print or electronic). To learn more about the Available in Library Collection limiter and how it functions click here, to review the information on the EBSCO Support Site.

CustomLinks & Link Resolvers

Since the items in our Partner Databases are resources not directly available from EBSCO, you will want to enable seamless access to the full text, or object, from each provider. If you are already doing this with your EBSCO database products, for items that EBSCO does not provide with full text, we will set up similar access in your EDS and EDS API profiles. There are two methods of setting up links to resources:

- **CustomLinks**: EBSCO has created a library of preformatted links called CustomLinks. When it is known that an account has access to an item, either because it is Open Access, or because you have subscribed to the resource, a CustomLink is enabled in EBSCO*admin* to take users from the record to the complete item on the publisher's site. We highly recommend using

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CustomLinks to access the Partner Databases because our CustomLinks take advantage of a publisher-provided linking solution which is considered to be the most reliable method of directing users.

- **Link Resolver**: To link to items not covered in the Partner Database Questionnaire we can use your link resolver, if applicable. 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.

Ranking your Links for Display

Once all CustomLinks, link resolvers, and—if applicable—Resource Sharing or Interlibrary Loan links have been set up in the your EDS and EDS API profiles, you can strategically order these links to provide the most optimized user experience.

Please refer to the following FAQ for more information on how to properly rank CustomLinks:
Ranking CustomLinks in EBSCO Discovery Service (EDS)

Authentication for your CustomLinks

While CustomLinks, allow us to leverage a persistent link provided by the publisher to provide access to the subscribed content on the publisher site, you must set up all appropriate authentication methods with the vendors where you hold subscriptions.

Innovative Interfaces recommends setting up IP-based authentication to publisher and full text aggregator sites, and using a proxy to provide remote users with access to these sites. When a combination of IP-authentication and either Web Access Management or EZProxy is used and proxy details are configured in EBSCO*admin* the following will result:

- Users who access Encore Duet from registered IPs will only be prompted to login before they view their library account, place a request or check out print or electronic materials, or submit community content.
- Encore Duet users will be able to login using the same credentials they already use to place requests or view their library accounts.
- Users who access Encore Duet from registered IPs will always get through to subscribed online content, without being prompted.
- Users who access Encore Duet from unregistered IPs will be prompted only the first time they attempt to access protected content; once they have successfully logged in, they will be able to access any protected or personal content throughout the session without being re-prompted.

To support this experience, a customer must set up proxy server details in EBSCO*admin*. For setup, we will need:

- Proxy URL Mask such as:
  http://{targetURLDomain}ezproxy.myinstitute.edu/{targetURLRemainder}
  http://ezproxy.myinstitute.edu/login?url={targetURL}
- The IP Address of the proxy server

Once this information is received, we can apply it to all of your CustomLinks.

If a proxy service is not available, alternative authentication methods are supported for access to CustomLinks. However, they still require set up with the vendors where customers hold subscriptions,

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and it may result in Encore Duet users being prompted multiple times for different login credentials (i.e. separate passwords for their Encore account versus the EBSCO*host* interface). These alternative authentication methods include:

- IP
- Username/Password
- Library Barcode
- Athens/Shibboleth
- Referring URL

Please contact EBSCO Support if you have any questions regarding the set-up of authentication in EBSCO*admin*.

Training

Online training is available on a variety of topics, including live and recorded sessions including EDS: ILS. Click here for more information.

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