26 October 2022 - Community Discussion on Esploro Integrations with Other Products

Join us for our next community discussion on Esploro integrations with other products

Please register in advance for these meetings (you are welcome to join either or both):

- Wednesday, 26 October 2022, ANZA @ 13.00 AEST/Australia https://us06web.zoom.us/meeting/register/tZYtcOmqqjIsG9RkMBAGRkR9fzv52Aq05obG
- Wednesday, 26 October 2022, Americas @ 12.00 EST/US https://us06web.zoom.us/meeting/register/tZEtf-qtpjwiHtV3VXji-CVW7cR_8gxceqvp

After registering, you will receive a confirmation email containing information about joining the meeting.

Please add your answers below (with initials), whether or not you are able to attend one of the discussions. We will record the sessions so if you wish to listen later you will be able to. We hope one of these time slots will work for everyone.

Please list your name, institution, and initials:

- Maureen Bezanson, Southern Cross University, MB
- Keely Chapman, RMIT University, KC
- Joan Kolarik, Drexel University, JK (and Weizmann, past)
- Christopher Hart, University of the Sunshine Coast, CH
- Rebecca Cooke University of the Sunshine Coast, RC
- Joseph Deodato, Rutgers University, JD
- Wendy Robertson, University of Iowa, WR
- David Gibbs, California State University Sacramento, DG
- Bin Zhang, California State University, Sacramento, BZ
- Sara Scheib, University of Iowa, SS
- Nancy Schuler, Eckerd College, NS

Discussion questions

Ex Libris specific integrations

1. Is there duplication between Esploro and your catalog (e.g. Alma)? Do you have your thesis records in both places? What is your workflow for including content in both places?
    - Weizmann / JK - The only duplication is book records. The theses in AlmaD and Esploro are different years.
    - DrexelU / JK - No duplication. Thesis records are in Esploro
    - SCU / MB - No duplication. Theses records are in Esploro.
    - RMIT/ KC - No duplication. Theses records are in Esploro.
    - USC / RC - no duplication, except possibly some books. We have all our theses in Esploro only.
    - Rutgers / JD - No duplication. Theses are stored in another repository (not Esploro).

- Iowa / WR - complete duplication (plus records from ProQuest which makes 3). We add theses to Esploro and catalog them in OCLC (subject headings and controlled access points).. We also have (typically) metadata only records for books in Esploro.
- Eckerd/NS - Theses originated in catalog/alma and imported to Esploro for migration. Will be suppressing the catalog records. Books are also duplicated for those written by researchers. Ex Libris provided code for hiding these duplicate entries from Esploro.
- ILO / VP - Not implemented yet, and we don't have theses. But, we keep records both in ALMA and ESPLORO.

2. Do all your Esploro records go to Primo or another discovery system? Are they in a local collection or only with articles from other sources? Do you only include a subset of your Esploro content? Do any Esploro records get suppressed in Primo?
   - Weizmann / JK - Yes, full Esploro content, unless suppressed (can't think of an example
   - DrexelU / JK - No. Dissertations are included in Primo, but the rest of the content is not.
   - SCU / MB - No. Theses are included in PrimoVE, but the rest of the content is not.
   - RMIT / KC - Yes, all Esploro records are indexed by Primo VE.
   - USC / RC - no, only in Esploro
   - Rutgers / JD - No. Esploro assets are excluded from Primo. They are only published to Google Scholar.
   - Iowa / WR - All content goes to Primo, but most is in a local scoped search with books and local items - all full text content is part of the focus on search in Primo. Metadata only records are in the search that includes articles from many places - CDI (Central Discovery Index) records from Ex Libris.
   - Sac State/DG - We exclude metadata-only records from Primo. This is especially important because we share a catalog with the 22 other CSUs.

3. How do you work with your link resolver? Do you rely on it? Do you add direct links to publisher content when it is not OA? How do you decide to show links to subscribed content for internal vs external users?
   - Weizmann / JK - only add direct links to OA content in order to record OA status. The are old records with direct links which have not yet been removed and these interfere with correct link resolver access from Primo. In Esploro, closed content with a DOI rely on the automatic DOI links. There can be other links, but these are a minority.
   - Drexel / JK - Since Esploro article links aren't in Primo, the link resolver is not relevant.
   - SCU / MB - We used to add the DOI link to all assets but only recently stopped doing that unless the item is OA and has an attachment. Now, if not OA, we are leaving no links so that the link resolver shows. Ideally we'd like to see the link resolver regardless - see ideas exchange: https://ideas.exlibrisgroup.com/forums/929326-esploro/suggestions/45176905-show-view-online-link-resolver-links-regardless
   - RMIT / KC - We have publisher supplied DOIs and URLs on all asset records where available. We haven't done anything further than this.
   - USC / RC - we add DOIs to the links, so the link resolver is suppressed.

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- Rutgers / JD - The primary audience for our research assets tend to be external users, so we do not use our link resolver to provide access. We generally include the DOI for the published version.
- Sac State / DG - We rely on the link resolver to provide full-text access to our researchers' publications.
- Iowa / WR - we try to have a link to the publisher version on OA items 9in the links sections, typically as DOI) - for the rest we rely on the link resolver so that people in Esploro or on a profile page can get to the full text - ideally for us the link resolver piece would use the local link resolver for each institution based on IP address or something (so that you could easily access our toll access articles via our Esploro)
- Eckerd/NS - we do use the link resolver. At this point, our audience is mostly internal so we link to Primo record.

4. Do you display the DOI **as a link** in an obvious place on the public record?
   - Weizmann / JK - The DOI as a link displays automatically in the Esploro record
   - Drexel / JK - The DOI as a link displays automatically in the Esploro record
   - SCU / MB - Per above, used to add DOI to the links section, now rely on the DOI automatically showing on the Esploro record
   - RMIT / KC - The DOI is in the links section and the DOI displays further down the record in the DOI field.
   - USC / RC - we add the DOI to the links section.
   - Rutgers / JD - We generally add the DOI for the published version to the links section.
   - Iowa / WR - we display the DOI but do not have it active as a link because we found people bypassing the link resolver options and were going directly to toll access content and then not being able to get to it
   - Sac State / DG - Yes, our DOIs are hyperlinked.

5. Do you view Esploro as primarily for internal or external users (that is, can they access your content via your proxy server or other authentication system)?
   - Weizmann / JK - Esploro is for both, not primarily one or the other. It is a resource for external users and it is a tool for internal users
   - Drexel / JK - still in implementation
   - SCU / MB - Both, institutional repository and public researcher profiles. Will shortly be using the information from the profiles to fill our Find a Supervisor search on our website.
   - RMIT / KC - Given that we were unable to implement the profiles, our Esploro instance is only for external users.
   - Rutgers / JD - We view Esploro as primarily for external users but are interested in making it friendlier to internal users. It would be great, for example, if there was a prompt (similar to Primo) where internal users could sign in to view additional access options. However, we're reluctant to display our link resolver to all users by default knowing it will only be useful to a minority.

- Iowa / WR - both (which makes the link resolver and no link to toll access full text a bit awkward for external users) - but more concerned about local people for metadata only records (possibly this will be an issue if/when we start actively using profiles)
- Eckerd/NS - internal at this point. Access is via IP and researchers can authenticate via Alma integration settings.
- Sac State / DG: Both

6. What API features do you most need?
   - Weizmann / JK - The API is used to transfer records to Pure. More identifier fields for researchers and affiliations were needed because the Pure sync required a standard identifier for organizations (not just the Esploro identifier) and a standard identifier for researchers (ORCID preferred, Scopus if no ORCID).
   - Drexel / JK - still in implementation
   - SCU / MB - We started to look at the API for our Researchers supervision status but found this information was not included in the API (although this may have been remedied, I'll have to double-check)
   - RMIT / KC - We've only looked at using the API for extraction of publication information.
   - Iowa / WR - interest in using API for publications by departments/research unit - no one is using it yet (or at least no one is live using it)
   - Sac State / DG - An API to integrate Esploro data with the campus website/department pages. This would help drive traffic to Esploro.
     BZ - We are currently using the Analytics API to pull data from Esploro (https://developers.exlibrisgroup.com/blog/Working-with-Analytics-REST-APIs/)

Other integrations

7. Do you have any issues with DOI registration with CrossRef or DataCite? Any tips?
   - Weizmann / JK - no issues
   - Drexel / JK - no issues
   - SCU / MB - no issues, currently using DataCite for DOIs
   - USC / RC - we have no issues using DataCite for DOIs
   - RMIT / KC - Not in use.
   - Rutgers / JD - no issues
   - Iowa / WR - we use both - not big issues. Occasional question with mapping and one glitchy record - documentation on exactly what maps where could be useful
   - Sac State/BZ - we are minting Handle, not DOI at Sac State.

8. Are you sending assets to ORCID? Any tips or problems? [Running ORCID integration on a subset of researchers is coming]
   - Weizmann / JK - no yet
   - Drexel / JK - no yet

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- SCU / MB - not yet but we are sending employment and plan to start sending assets after November release, we did notice, when trying to report on how many of our researchers have affiliated with ORCID that ORCID affiliation status is not part of analytics (see ideas exchange: https://ideas.exlibrisgroup.com/forums/929326-esploro/suggestions/45656998-orcid-affiliation-status-available-in-analytics)
- USC / RC - still testing this, but are sending employment
- RMIT / KC - Not in use.
- Rutgers / JD - Yes. We reported an issue in late July when we discovered that some of our assets were not being pushed to ORCID as expected (case #06451332). We were unable to get any details about the scope and nature of the problem but were told that it would be fixed in the November release. We also decided to disable the Esploro letter notifying researchers when assets are pushed to ORCID since it didn't provide any information about which assets had been pushed and they generally receive the same notification from ORCID.
- Iowa / WR - not in use yet (ORCID are connected to our central directory, and from their it comes to the researchers record)
- Sac State / DG - We tried to send employment data, but the data quality was poor.

9. Are you sending assets to any other external system, such as InCites or Altmetric?
   - Weizmann / JK - [1] Altmetric. The lack of a robust OAI interface is a problem, but there are workarounds; [2] National Catalog of Israel. Theses. Don't have the details, but believe it was also to use OAI. [3] Pure - the aforementioned API sync
   - Drexel / JK - not yet
   - SCU / MB Not yet, plan to send theses to National Library via OAI, dataset metadata is being sent to ARDC via OAI.
   - USC / RC - sending theses to the National Library via OAI, but need to manually add to Altmetric Explorer due to the lack of maturity of OAI DC, dataset metadata sent to ARDC (testing) via Esploro OAI.
   - RMIT / KC - Trove harvests all our Esploro publication records.
   - Rutgers / JD - No, not at the moment.
   - Iowa / WR - not yet. We should be doing more with OAI to get our content into other systems
   - Sac State / DG - sending assets to the CSU-wide IR (Samvera platform)
     BZ - We are sending assets (metadata) to Samvera via OAI using the Esploro metadata schema, and the affiliated department/college names are sent separately via the Analytics API calls (the OAI output only includes codes for the affiliated departments).

10. Are there integrations that you wish you had or know you will need?
    - SCU / MB
      - import of Australia Research Council (ARC) grants, theses export to National Library (functionality exists but we just haven't implemented yet),

    - might want to see ability to import media mentions (still working with out Marketing team to decide if we even want to take advantage of the media mentions).
    - Would also be good to have the ability to run a Smart Harvest/Expansion for the institution instead of a specific researcher. E.g. ability to have import profile for Scopus/WOS with parameters for institution so we can import all assets with that affiliation. OR, for Smart Expansion, would be good to be able to run the import without having an Alma_ID so the SH matching logic would apply without us having to look up what the researcher ID is before importing.
- Weizmann / JK - other CRIS / RIM systems (https://igelu.org/wp-content/uploads/2022/10/Are-two-tools-better-than-one-Challenges-and-opportunities-in-research-data-management-using-Converis-and-Esploro.pdf / https://igelu.org/archive-of-presentations/2022-cardiff/igelu-2022-presentations/day-3-15-september-2022/)
- RMIT / KC - Scopus Citation Counts, Scopus publication records, Web of Science publication records, Dimensions impact information, Plum X metrics, Clarivate Derwent Patents and WorldCat.
- Iowa / WR - not that I know of

Proposed Topics for Next Meeting

- Projects
- Collections
- Grants
- Activities