DEI Advisory Proposed User Stories for Product Enhancement

Discovery - Primo VE

Network Zone Exclude List Tool

User story: in the NZ discovery manager role, I would like to centrally manage my stop list across all institutions within my network zone. I would also like the institution to have the freedom to make changes/edits/manage the list if they choose or reconnect to the centrally managed list.

An expansion of the current Exclude List tool would allow subject terms to be controlled at the Network Zone instead of the Institutional Zone (IZ). Institutions should be able to inherit a centralized stop-term list or control their own as explained here under "Define Code and Mapping Tables Centrally".

Justification: The DEI Exclude List tool is currently available at the level of institutional control. A few consortia have discussed the need to centrally manage this list so that downstream staff do not have to manage this term list (they have central groups that decide/review terminology). When updates are made to that list, discovery managers are forced to make changes across each institution's stop list rather than centrally distribute the configuration change. This causes unnecessary work for network zone administrators or downstream discovery staff. This improvement would save discovery managers a considerable amount of time copying and pasting changes from institution to institution.

Primo / Summon

DEI Exclude Tool - include substrings

The current tool performs a literal suppression of subject terms through exact text matching. This is problematic for complex subject headings where problematic language is "contained" in the rendered subject heading.

To take as an example, if the term "illegal aliens" were listed in the current DEI Exclude tool, the following scenarios would result. While this tool handles the most egregious examples (and does not hide these results from search), it does not suppress or transform a subject heading unless the term is the only string in the PNX:display:subject entry. More importantly, it does not remove problematic language used in facets on the primary search result page.

Example subject heading	Suppression of term in full display
Illegal aliens	yes
Illegal aliens – Canada	no
Children of illegal aliens – Education-Law and Legislation	no

While libraries have control over their local metadata, they do not have control over incoming CDI metadata. Many institutions have included language in normalization rules for local data to transform subject strings to more culturally sensitive language. While it is understandable that the tool was meant to handle the most egregious/aggressive of terms, it does not have the level of granularity for institutions to manage. In essence, libraries include incoming occurrences, only to find other substrings that have to be added and redeployed.

It would be helpful to add the following syntax to handle some measure of stemming at the display level. This is not an ideal solution, since it removes access points from the display, but it may address some of the most egregious language and associated phrases.

Subject term - string literal	Illegal aliens
Subject term - subheadings / directional wildcard	Illegal aliens - %
Subject term - bi-directional wildcard	% illegal aliens %

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DEI Term Substitution Tool

As an institution, I want to substitute offensive phrases in subject metadata for more culturally appropriate/sensitive terminology within the Primo display. Ideally, these terms and their substitutes could be managed at the network zone level to support centralized management with an institution's ability to customize/add terms to the inherited code table.

Primary metadata generated by the author or specific to the work (such as chapter titles, title, author, etc) would not be eligible for substitution, but third-party assigned terminology (subjects, keywords) would be eligible for term substitution. (similar to the current DEI exclusion tool). The ideal function would examine strings in the <pnx:subject> area and perform a replace() function with the subject terms before rendering the interface.

This functionality would act in a similar manner / extension of the term suppression tool with the additional proposed functionality:

Exclusion of specific data source codes or ALL (this would allow the inclusion of CDI metadata, but preserve specific data sources from historical or special collections)

MVP - Phrases would be literal substitution of incoming to transformed phrases, such as those in the example below.

Subject term - string literal	Illegal aliens	Undocumented immigrants
Subject term - subheadings	Illegal aliens – Canada	Undocumented immigrants - Canada
Embedded subject terms	Children of illegal aliens – Education-Law and Legislation	Children of undocumented immigrants – Education-Law and Legislation

Transforms would focus around words/phrases that had space characters around them or were literal string transformations.

Primo / Summon

Contextual Problematic Terms Tool

User Story: As a user in Primo/Primo VE, when I encounter a term that could be potentially offensive, I wish to have further explanation about the context and use of the term. This tool should be managed in either the institution zone or the network zone.

This would follow in a similar vein as the table available for the exclude list, but it would include the possibility of the following fields:

1. Value of term
2. Link to explanatory source
3. Short explanation text blob
4. Image URL
5. Date updated
6. Contact link (either mailto: or https:// link)

Example:
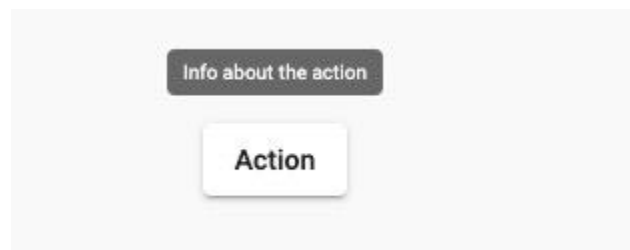
The context tool changes the inline text to a button, and would behave as a tooltip above or below the term (based on code-table or css setting). The button would link to the explanatory source link. In order to address accessibility concerns, the aria-describedby description would include the text blob of the term. Ideally, an image should be able to be inserted in the tooltip as well as text.
(https://stackblitz.com/edit/angular-s1k7m2?file=src%2Fapp%2Ftooltip%2Ftooltip.component.css)

Ideally, the patron should be able to disable context notices or not and that setting should be set as a user preference.
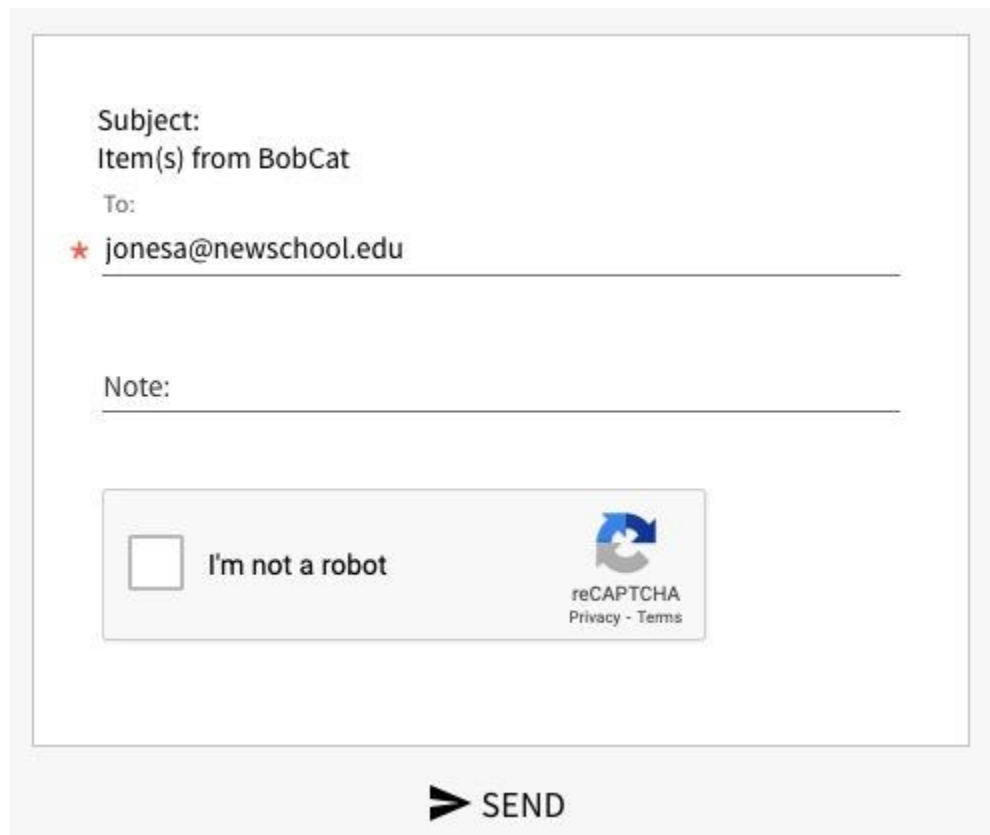
Justification: Sometimes, it is more important to provide context around the use of a particular subject term than to suppress it. This is particularly the case for historical documents in collection discovery. Librarians and archivists would like to 'flag' these words so that patrons have a better understanding of the historical context/use of the term. While we have direct edit access to materials within our own collections, we do not have the ability to edit incoming

subject terms for CDI. Enabling a feature such as this within the discovery layer would allow the library to keep potentially offensive words within the record, and provide context when necessary, particularly for older articles and content.

Primo / Summon

Offensive Term Reporting Tool

Similar to 'report a problem', this feature would enable patrons to submit feedback about potentially offensive content within an institution's holdings and/or article data. Ideally, this feature would follow the same architecture of the 'Email Result' function. Again, this should be a feature that can be pushed from the network zone to different institutions or the institution should be able to override/customize this function.

Fields necessary for tool configurable in code table to support multiple languages:

Form fields/values for popup window should include

- Intro-text as code table value
- link to offensive content review policy
- Short text field for offensive term
- Longtext field for explanation
- Email address to send feedback
- Submission/Send button

Primo / Summon

Metadata Statement Popup User Story

Recommendation:

- Add to each record an icon (question mark or other symbol) to hover over to learn more about metadata in details pane
- icon hover brings up a box with first-level info and ability to link to second-level info (see below)
- Example of what it could look like (below) - one of several possibilities:
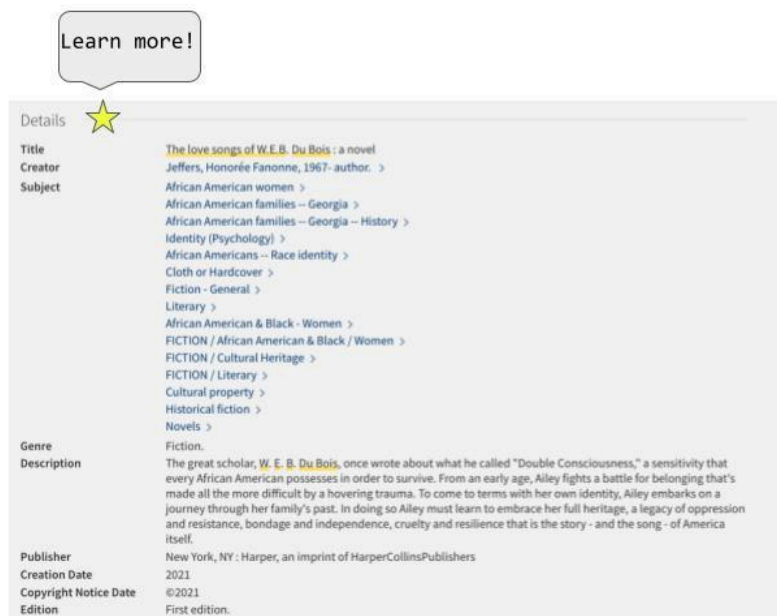
We are suggesting multiple "levels/points of interaction" language options.

- Respect local control and make sure this PRIMO option is customizable
- Make code table queryable for local customizations.

Highly encourage ExLibris to consider adding a commenting/form component to PRIMO where both the local institution and ExLibris would receive feedback (see offensive term reporting tool)

First Level - Invitation to Learn More About Metadata/Information about the Record/resource
An invitation to learn more/very generic, general, e.g. Learn more about this metadata;
BANNER, UNDER THE DETAILS PANE IN THE RECORD or ICON NEXT TO DETAILS
HEADER

- Questions about this metadata? etc. If you want to learn more about the metadata here, or if you have concerns, please click here:
- Where description comes from; if you want to learn more about how [institution] provides description [email/feedback form]
  - Where description comes from: controlled vocabularies, authors/creators, library staff, ExLibris
- All users should be aware that certain words, terms, or descriptions may be culturally insensitive or inappropriate. Please report.
- We want to alert you that you may find content in your search results, either within images, in metadata, or in database searches that you may find objectionable.
- Accepting ongoing responsibility for remediation of metadata/records.

Second Level - Fuller statement of critical cataloging
Provide the details about where metadata comes from; contextualization; collaboration

- The more complete statement from a Library
- Institutional mission
- We acknowledge that the creation and management of metadata are not neutral activities.
- We acknowledge that some of our bibliographic descriptions may contain racist, homophobic, sexist, or otherwise derogatory and offensive language.
- We acknowledge that we are often describing communities of which we are not a part.
- We acknowledge that there are portions of our catalog over which we do not have control (i.e., CDI)
- Example statements
  - [Statement on Inclusive Description](#)
  - [Harmful Language in the Library Catalog](#)
  - [Harmful Language (UMKC)](#)

Primo / Summon

Country of Origin Widget

I would like to be able to filter/focus search results based on geographic region. The data would originate from author institutional affiliation (or publisher location), data which is available within Book Citation index and the various WoS citation index collections. Ideally, there would be an enrichment process for local bibliographic data that would add these values to the Primo/PrimoVE/Summon Search index.

When patrons are searching Primo, a control would appear (see below) where patrons could filter their results to a geographic region or a specific country. A cluster map would present where specific scholarship originates (via author affiliation or publisher). This exposes diversity in a visual way, it enables course stakeholders to view the geographic distribution of author or text cohorts. This could support DEI or decolonisation initiatives in library and curricula.

Rialto / Collection Development

Measures of Universal Access

User story: As a selector, I wish to know the accessibility rating of the platform I am selecting as well as whether the ebook platform supports text-to-speech functionality. Accessibility ratings should be made available from VPATs on vendor sites. Icons should also be present about the accessibility rating (2.0, 2.1 / A,AA, AAA, AAA+) of the platform that the book resides in.

Designations should be clear in order information within Rialto, preferably within the brief results entry of each book, and accessibility ratings / text to speech availability should be a facet within the search interface. These could also effectively be badges.

Ideally, we should have an accessibility report for our current electronic holdings (based on platform) to encourage vendor compliance with universal design principles. A different report should exist for vendors without accessibility ratings on file to encourage vendor-customer engagement.

Function to support scholarship by under-represented / marginalized communities

User Story: As a user, I wish to be alerted when a title in a subject area has been published. This would involve exposing the Diversity, Equity and Inclusiveness classification scheme/taxonomy within the [Cross Multidisciplinary Offers List](#)

Additional title alerts could include watchlists of when self-identified LTBGQ, persons of color, or members of marginalized communities publish a monograph in the [recommendations profile](#).

Set DEI Purchasing Goals per fund

User Story: As a user, I want to know if my institution sets a quota for under-represented scholarship that I can measure progress on that goal throughout the fiscal year. I should be able to "mark" titles contributing to that goal and produce title lists/reports on the goals themselves. For example, suppose I set a goal to order 10% (or 7,000 USD) of a regional studies fund to be about the Caribbean Islands. In that case, Rialto should measure the progress of that goal as I am making selections throughout the year. Goals can be for a particular selector or shared across a group of selectors. Goals could also be based on particular language assignments, subject areas, or ebook functionality (such as books with text-to-speech).

Leganto / Reading Lists

Robyn Price presented to the group a measure of diversity created at Imperial College London based on author affiliation country and country GNI per capita. The intention of this measure is to provide course stakeholders with quantitative indicators to support understanding of geographic distribution or bias in curricula. This is part of broader discussion in Higher Education around DEI or decolonising institutions and the academy, with an interest particularly from STEM fields to see evidence in data form that can then support more qualitative and contextual initiatives.

Another place to put this info may be in the course info tabs within Leganto - tabs that already make calculations on course interactivity, but not bibliographic data. Institutions should be able to define metrics in custom tabs that not only signify diversity measures, but also benchmark diversity goals, similar to recommendation profiles available within Leganto. Institutions or departments should be able to define goals and work with libraries to include those goals in the Course Info tabs based on an embedded widget from Leganto analytics.

An investigation would be needed on how to handle authors without institutional affiliation and how to handle other data anomalies, but we believe this could be an interesting use case where CDI and WoS data come together to promote awareness when faculty are choosing readings for their courses.