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Eliminating Data Redundancy: Our Solution for Database Discovery using Alma/Primo

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Citation Information

Kindle, Jacob; and Clamon, Travis. 2016. Eliminating Data Redundancy: Our Solution for Database Discovery using Alma/Primo. *ELUNA 2016 Annual Meeting*, Oklahoma City, OK. http://documents.el-una.org/1319/

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Eliminating Data Redundancy: Our Solution for Database Discovery using Alma/ Primo



Eliminating Data Redundancy: Our Solution for Database Discovery using Alma/Primo

ELUNA 2016

<u>Presented by:</u> Travis Clamon, MSIS Jacob Kindle

Background

- Travis Clamon, MSIS
 Electronic Resource Specialist
- Jacob Kindle
 Web Manager
- ETSU = ~15,000 Students / 2,000 employees
- Migrated to Alma & Primo in June 2015



Our E-Resource Workflow Goal

- Eliminate Redundant Data
- Simplify Workflow
- Improve Discovery
- User Experience
- Support





Electronic Resource Endpoints

LibGuides











Electronic Resource Endpoints





How did we accomplish our goal?

6 Steps:

- Assessment
- Metadata
- Alma Setup
- Primo Setup
- Primo X-Service API
- A-Z Development



Step 1: Assessment

- Identify Resources
- Compare with existing collections in Alma
- Develop Final list for metadata

- Review & Compare
- Full text collections should already exist in Alma
- Create Electronic
 Collections of "Database"
 type if no portfolios exist
 (Abstract / Website / etc.)
- The final list will serve as a checklist for metadata



Step 2: Metadata

- Create MARC Records for each database/resource
- MARCedit
- Permalinks recommended for URL's
- Create Authority Lists for Subjects, Providers, and Formats

- 245a = title
- 500a = database coverage
- 520a = short description
- 520b = long description
 - 653a = keywords
- 914a = Licensed / OA
- 917 = URL / Provider/Access Note
- 960a = ETSU subject
- 963a = Format



- =LDR \\\\\nmi\a22\\\\\\u\4500
- =245 00\$aCriminal Justice
- =500 \\\$aDatabase coverage: 1981-current.
- =520 \\\$aFull-text coverage of crime and its social and legal implications.\$bSupports research on crime, its causes and impacts, legal and social implications, litigation, and crime trends. Includes correctional and law enforcement trade publications, crime reports, and other material relevant to careers in criminal justice and law enforcement.
- =653 \\\$aAddiction
- =653 \\\$aCriminology
- =653 \\\$aCorrections administration
- =653 \\\$aCriminal law
- =653 \\\$aFamily law
- =653 \\\$aIndustrial security
- =653 \\\$aRehabilitation
- =914 \\\$aLicensed
- =917 40\$3ProQuest\$uhttp://libs.etsu.edu/links/cjft.html\$zETSU
- =960 \\\$aCriminal Justice and Criminology
- =960 \\\$aPsychology
- =960 \\\$aSocial Work
- =963 \\\$aAbstract and Indexing

Sample MARC Record – Criminal Justice (ProQuest)



Refine My Results

Provider

Format

- Abstract and Indexing (151)
- E-Books (20)
- Images (12)
- Maps (1)
- Newspapers (11)
- Point of Care (14)
- Reference Tools (8)
- Streaming Media (10)
- Style Guides (3)
- Test Preparation (1)

Subject

- Accountancy (8)
- Anthropology (9)
- Appalachian Studies (10)
- Archival Studies (1)
- Art (9)
- Audiology (9)
- Biological Sciences (27)
- Business (21)
- Cardiopulmonary Science (24)
- Career Resources (2)
- Chemistry (15)
- Communication Studies (6)
- Computing (19)
- Counseling (8)
- Criminal Justice and Criminology (11)
- Dental Hygiene (24)
- Didital Media (3)

Create a controlled vocabulary for all facet fields (Subject, Format, Provider, etc)

- Consult with staff and librarians
- This will eliminate variations of terms causing duplicate facet terms ("Computing" vs. "Computer Science")
- Primo Static Facets will also help (discussed shortly)

Before you begin creating records.....



Step 3: Alma Setup

- Import records using import profile
- Complete required fields for all electronic collections
- Search Index Easy find
- Associate to Alma set or top level collection





Create Import Profile & Merge Rule



Resource description	1 Web of Sc	ience					
Electronic Collection name	e <u>Web of Sc</u>	ience					
Electronic Collection Des	cription	General Information	Additio	onal Information	Notes	Group Settings	History
Electronic Collection Inform	ation						
Source				So	urce ID		
Creator							
Alternative Title							
Electronic Collection Level	http://libs.e	etsu.edu/links/wos.html					
URL							
Electronic Collection Level							
URL (override)							
Electronic Collection is free?	⊖Not Fre	e Free					
Electronic Collection Proxy	No ○Y	es	E	lectronic Collectior	n Proxy		
Enable				S	elected		
Language			-	Cá	ategory		
Additional descriptive	Web of Sc	ience	2 🖉				
Information	0			Character act			
Number of portfollos	0			Character set -			

Complete required fields for all electronic collections

Electronic Collection Level URL (ETSU uses short permalinks) Additional descriptive information



Find All titles	where Local field 917 v contains ETSU Go Advanced search Saved queries
Institution Comm	inity
imit results to:	
Inventory	Primary Sort by Rank Secondary Sort by Rank
Collection	1 2 3 K M Go 1 - 20 of 205 Records 📑 To
Electronic title	1 SciFinder
Physical title	Computer file {Other material - Electronic} Subject: Biographies Language: English
Material Type	Collections: ETSU Databases Availability: Electronic collection SciFinder
Book (1)	11010
Computer file (204)	Edit Order Request Document Delivery Add to collection View It More info
Language	2 Safari Books Online (TN Board of Regents Collection) Computer file (Other material - Electronic)
English (205)	Language: English Collections: ETSI Databases
	Availability: Electronic collection Safari Books Online
Publication Year	11010
<u>1998 (1)</u> 2016 (1)	Edit Order Request Document Delivery Add to collection View It More info
2010(1)	3 Gale Virtual Reference Library Computer file (Other material - Electronic)
Collection	Subject: Arts & amp; Entertainment Biography & amp; Genealogy Business & Economics and others Language: English
ETSU Databases (196)	00111 Availability: Electronic collection Gale Concare Virtual Reference Library

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Create Search Index to find DB's - Save as an Alma Set



🗊 ETSU Databases				
General Details	Name ETCU Detabases		Title ETCU Detabases	
	Description -		The <u>ETSU Databases</u>	
	External System -	External -	Library ETSU Sherrod Library	
		U		

Title I

		Find :	in : Title 🔻 Go
		1 2 3 b b Go 1 - 20 of 198 Records Co	olumns 🔻 📑 Tools
MMS ID	Title	Material Tune	
1 9951466402331	APTeter	Computer file	
1 5551400402551		Computer nie	view
2 9969187302331	ClinicalKey	Computer file	View
3 99164888202331	ACM Digital Library	Computer file	View
4 99164987402331	MathSciNet	Computer file	View
5 99167786602331	CABI Global Health	Computer file	View
6 99173587902331	Canadian Newsstand Complete	Computer file	View
7 99174486302331	<u>Snapshots</u>	Computer file	View
8 99174486402331	FIAF Index to Film Periodicals Plus	Computer file	View
9 99174486502331	Public Health	Computer file	View
10 99174486602331	Telecommunications	Computer file	View
11 99174486702331	Science Journals	Computer file	View
12 99174486802331	Research Library	Computer file	View
13 99174486902331	Religion	Computer file	View
14 99174487002331	Psychology Journals	Computer file	View

Create Top Level Collection / Import records from Alma Set



Consider:

- Skill Strengths
- Existing Software
- Maintenance

A-Z Database Strategy

OAI

Primo

X-Service API

<u>;;;</u>

Alma API





Why we chose Primo X-Services API?

- 1. Records already harvested in Primo
- 2. Primo normalization needed work to take advantage of metadata in step 2
- 3. Facets/Search functionality passed on via API
 - Primo -> Excellent indexing -> Why reinvent the wheel?
- 4. Less coding / No separate DB needed



Step 4: Primo Setup

- Allows for better visibility of database results in Primo
- Sets up the framework for a custom A-Z list using X-Services API.

- Scoping
- Display / Linking Fields
- Facets
- Search Fields
- Normalization Rules
- Code Tables
- Mapping Tables
- View Settings



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Edit Scope			
General Attributes for Scope ETSU D	Jatabases		
Owner: 01ETSU - East Tennessee State U	Iniversity		
Scope Value Name:	ETSU Databases		
Scope Value Code:	ETSU_DB		
	Manually defined Search Score	ope	
	scope:(ETSU_DB)		
Description:			
Scope Туре:	Collection •		
Use Scope for:	Search	Restricted Search	

Create Scope

Used for X-Services API (A-Z List). Only scope DB records.





<facets>

<collection>ETSU Databases</collection>

</facets>

Rule group search_s Type Source PNX Conditional	earchscope tions logic	Value facets/colle	ction		✓ Enabled	- 1
Conditions 🖶 True	•					
Condition 1 - Logic	True	T				
Condition 1 - Source	Туре		Value			Success If
	PNX 🔻		facets/collection			Match Any 🔻
Condition1 - Routines 🖶	General Parameter Routine	r		Parameter		
	Check that string e	exists	۲	ETSU Databases		
Transformations Transformation Write constant Behavior Action ADD •			Parameter ▼ ETSU_DB			

Create Normalization Rule for Scope

(based on Alma Top Level Collection)





MARC	Field	PNX
245a	Title	/display/title
500a	Coverage	/display/lds16
520a	Short description	/display/lds17
520b	Long description	/display/description
653a	Keywords	/display/subject
914a	Licensed / OA	/display/lds14
917	URL	/links/lln01
960a	ETSU Subject	/display/lds15 /facets/lfc15
963a	Format	/facets/lfc12
917 40 \$3	Provider	/display/lds10 /facets/lfc10

Create remaining normalization rules / MARC to PNX



Code Tables

Update for Owner: 01ETSU - East Tennessee State University	Sub System: FRONTEND Table	Name : FrontEnd Display Fields	Search
--	----------------------------	--------------------------------	--------

Code Table Rows

Enabled	Field Code ▲▼	Field Name 🔺 🔻	Language ▲ ▼
			All 🔻
	lds10	Provider	en_US
	lds12	lds12	pt_BR
	lds11	Link	en_US
	lds12	Database Format	en_US
	lds13	Access Note	en_US
	lds14	License	en_US
	lds15	Database Subjects	en_US
	lds16	Database Coverage	en_US
	lds17	Database Short Description	en_US

Front End Display Fields



Code Tables

Update for Owner: 01ETSU - East Tennessee State University Sub System: FRONTEND Table Name : Facet Labels

	default.facets.facet_local12	Database Format	en_US
	default.facets.facet_local15	Database Subject	en_US
	default.facets.search-box.facet_local15	Database Subject	en_US
•	default.facets.search-box.facet_local12	Database Format	en_US
•	default.facets.facet.facet_local10	Database Provider	en_US
	default.facets.search-box.facet local10	Database Provider	en US

Facet Labels

Code Tables

Update fo	r Owner: 01ETSU - East Tennessee State University	Sub System: FRONTEND Table Name : Facets Code Fields	T
4	facet_local10	Database Provider	en_US
	facet_local12	Database Format	en_US
	facet_local15	Database Subject	en_US

Facet Code Fields



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Mapping Tables

Update for Owner: 01ETSU - East Tennessee State University Sub System :	Static Facets •	Table Name :	Static Facets

Mapping Table Rows

Enable	ed	Static Facet Name*		Code Table Name
		Database		
		Database Subject		facet_local15_values_codes
	Mapping T	ables		
	Update for Owner	: 01ETSU - East Tennessee State University Sub System :	Stati	c Facets ▼ Table Name : facet_local15_values ▼
	Mapping Table I	Rows		
	Enabled	Value Name		Value*
		Communication Studies		Communication Studies
		Accountancy		Accountancy
		Anthropology		Anthropology
		Appalachian Studies		Appalachian Studies

Consider making A-Z Subjects a static facet





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Code Tables

Update for Owner: 01ETSU - East Tennessee State University	Sub System: FRONTEND Table Name	Basic Index Fields		T
lsr15	Database Subject		en_US	

Allows custom fields to be searchable

- Facets:

Field	Value
Maximum Number of Displayed Facets	65

Search Engine Configuration





Facets to display

Туре	Items to Display	Sort	default_tab	lib_tab
Database Format	10	alpha_numeric		s
Database Subject	10	alpha_numeric		
Database Provider	10	alpha_numeric		V

Field to display in the full results

Field	
Provider	Edit
Link	Edit
License	Edit
Database Format	Edit
Database Subjects	Edit

View Configuration



BI/INFORM Complete roQuest Online access View Online Details	
	Actions
	Links
Subjects: Business; Economic conditions; Corporate strategies; Management theory; Management techniques; Business trends; Market and industry reports; Product information; Accounting; Finance	> ETSU Database Link
Description: Business research database Comprehensive business research database including full-text journals, trade publications, market reports, industry reports, working papers, dissertations, business cases, and conference proceedings.	
Language: English	
Source: 01ETSU ALMA	
Provider: ProQuest	
Link: http://libs.etsu.edu.iris.etsu.edu:2048/links/abi.html	
License: Licensed	
Database Format: Abstract and Indexing	
Database Subjects: Accountancy Business	
Economics and Finance	
Management and Leadership	
Markeung Public Administration	
Public Health	
Regional and Community Studies	
Sport Leavership and management	

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Primo View



Step 5: **Primo X-Services** • API Current

ExLibris Developers Site:

https://developers.exlibrisgroup.com/ primo/apis/webservices/gettingstarte <u>d</u>

- API Demo
- - API Calls



X-Services API (Unmodified)





English



X-Services API (Current)

Tennessee Board of Regents Libraries OneSearch		EAST TENNESSEE STATE
ETSU Electronic Resources Tool (Beta)		New Search e-Journals A-Z Help
Type here	Search	
	ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z	
Refine My Results	203 Results	Quick Picks
Provider +	ABI/INFORM Complete 🚯	CINALII Complete
Format -	Business research database	Nursing and allied health database
 Abstract and Indexing (151) E-Books (20) Images (12) Maps (1) Newspapers (11) 	AccessMedicine ① Multimedia resource for medical education and clinical practice	PubMed Biomedical and health information
 Point of Care (14) Reference Tools (8) Streaming Media (10) Style Guides (3) Test Preparation (1) 	AccessPharmacy () Multimedia resource for pharmacy education and practice	Micromedex 2.0 Clinical decision-support databases
Subject -		JSTOR
 Accountancy (8) Anthropology (9) Appalachian Studies (10) 	Current accounting, taxation, and financial management information for professionals	Comprehensive academic articles and E-Books
 Archival Studies (1) Art (9) Audiology (9) Biological Sciences (27) Business (21) Cardiopulmonary Science (24) 	ACM Digital Library	PsychINFO Peer-reviewed literature in behavioral science and mental health
 Career Resources (2) Chemistry (15) Communication Studies (6) 	ACS Style Guide 1	feedback



Mapping Tables

Update for Owner: 01ETSU - East Tennessee State University Sub System :	Front End	•	Table Name :	WS and XS IP 🔹	Search in Table:	

Mapping Table Rows

Enabled	Start IP*	End IP	Description	Last Updated
1				12/22/15 By ExlibrisSupport
s.	· · · ·	e	•	10/07/15 By ExlibrisSupport

SalesForce Case – Add IP's to mapping table



API Diagram





API Call – PHP or Javascript?

- Originally, the X-Services API used Javascript/AJAX to make calls to Primo.
- This only allowed access to the tool on certain machines, as the calls are restricted by IP and AJAX calls were being made from the client side.
- To make this more broadly useful, we used PHP and CURL to make the calls from the server side as follows:



API Call – CURL

\$institution = '01ETSU'; **\$bulkSize = '300';** $\frac{1}{1}$ \$sortField = 'stitle'; \$lang = 'eng'; \$json = 'true'; \$loc = 'local,scope:(ETSU DB)'; \$callback = 'parseResponse'; \$query = 'any,contains,01ETSU*'; \$request = "http://etsu-eduprimo.hosted.exlibrisgroup.com/PrimoWebServices/xservice/search/brief?institution=\$institution&query=\$query&bulkSize=\$bulkSize&indx=\$index&s ortField=\$sortField&lang=\$lang&json=\$json&loc=\$loc"; \$ch = curl_init(\$URL); curl_setopt(\$ch, CURLOPT_RETURNTRANSFER, true); curl_setopt(\$ch, CURLOPT_TIMEOUT, 30); curl setopt(\$ch, CURLOPT HTTPHEADER, array("Content-Type: application/json; charset=utf-8","Accept:application/json, text/javascript, */*; q=0.01")); curl_setopt(\$ch, CURLOPT_URL, \$request); \$output = curl_exec(\$ch); // Close request to clear up some resources curl close(\$ch);



Step 6: A-Z List Development

- Facets
- Quick Picks
- Navigation
- Course Guides
- Report a Resource



Additional Features – Facet Break Down

- The standard facets in the original X-Services API code were not consistent with our goals (Resource Type, Show Only, Creation Date, etc)
- Instead, we added multiple local fields to address our needs. The new facets we use in this Resources Tool include Provider, Format, and Subject. The following video shows what happens when a facet is used to narrow results:



Facet Break Down

Refined by: Computing (X)

19 Results

Recommended Resources

ACM Digital Library

Association for Computing Machinery (ACM) publications online

Safari Books Online (TN Board of Regents Collection)

Digital library on information technology, software development, and digital media.

Other Resources

Applied Science and Technology Full-Text ()

Core literature in applied science including engineering, computers, informatics.

arXiv 🛈 👌

Open access articles in physics, mathematics, computer science, quantitative biology, quantitative finance and statistics

Career and Technical Education ()

Vocational information and career search resources

Represents the "best bet" databases for a subject handpicked by our librarians

Remaining databases that are tagged with the subject computing



Facet Break Down

Multi-Disciplinary Databases

3

4

5

ARTstor 1

Digital images in the arts, architecture, humanities, and sciences

2 Dissertations and Theses at ETSU (1)

ETSU theses 2000-present, dissertations 1972-present.

Dissertations and Theses Full-Text 🚺

Comprehensive collection of theses and dissertations.

eBooks on EBSCOhost 🚺

Academic and popular online books.

Films on Demand 🛈

Curriculum-focused streaming video

Multi-Disciplinary databases are pulled into all searches and refinements. These results are placed at the bottom of a search.



Facet Break Down - Video

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ETSU Electronic Resources Tool (Beta)		New Search e-Journals A-Z Help
Type here	Search	
	ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z	
Refine My Results	185 Results	Course Guides -
Provider +	ABI/INFORM Complete	
Format -	Business research database	
 Abstract and Indexing (151) E-Books (20) Images (12) Maps (1) Newspapers (11) Point of Care (14) Reference Tools (8) Streaming Media (10) Style Guides (3) Test Prenaration (1) 	AccessMedicine ① Multimedia resource for medical education and clinical practice AccessPharmacy ① Multimedia resource for pharmacy education and practice	
Subject -		
 Accountancy (8) Anthropology (9) Appalachian Studies (10) Arphine Studies (1) 	Accounting and Tax (1) Current accounting, taxation, and financial management information for professionals	
 Art (9) Audiology (9) Biological Sciences (27) Business (21) Cardiopulmonary Science (24) 	ACM Digital Library Association for Computing Machinery (ACM) publications online	
 Career Resources (2) Chemistry (15) Communication Studies (6) 	ACS Style Guide 🚯	feedback



Additional Features - Quick Picks

 Quick Picks represents our 5 most commonly used databases. We obtain this data from Google Analytics which tracks the usage of our database links from all library sites.

Quick Picks

CINAHL Complete

Nursing and allied health database

PubMed

Biomedical and health information

Micromedex 2.0

Clinical decision-support databases

JSTOR

Comprehensive academic articles and E-Books

PsychINFO

Peer-reviewed literature in behavioral science and mental health



Additional Features – A to Z Navigation

ALL | A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

- Remove Native Pagination
- Add A-Z Navigation
 - A-Z Navigation is achieved using anchor tags corresponding to the first letter of each database



Additional Features – Course Guides

- In order to eliminate the need for students to search in multiple areas when doing research, we use the LibGuides API to pull in results from our course guides as well. This searches our course guides and returns results based on tags that correspond to the entered search term and to the subject facets. Once the result set has been broken down, either by a search query or by refinement using facets, Course Guides will replace Quick Picks in the right sidebar.
- The following video demonstrates the inclusion of Course Guides:



Course Guides

ETSU Electronic Resources Tool (E	Search e-Journals Help	
Type here	Search	
	ALL A B C D E F G H I J K L M N O P Q R S T U V V	N X Y Z
Refine My Results	Refined by: English (X)	Course Guides -
Provider +	6 Results	 ENGL 2210: British Literature I
Format -	Literature Resource Center 🕕	
 Abstract and Indexing (5) E-Books (1) 	Critical, biographical and contextual literary content	 ENGL 2430: European Literature
Subject -		• ENGL 2220: British
 Appalachian Studies (1) Art (2) Biological Sciences (1) 	MLA International Bibliography (1) Modern languages, literatures, folklore and linguistics.	Literature II
 Chemistry (1) Communication Studies (2) Education (1) Foreign Language and Literature (4) 	Opposing Viewpoints in Context () Explore issues from multiple perspectives	 English 1020: Critical Thinking and Argumentation. Prater

When a search or refinement is conducted, the 'quick picks' section on the right is replaced with our Course Guides corresponding to that search.



Course Guides - Video

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ETSU Electronic Resources Tool (Beta)		New Search e-Journals A-Z Help
Type here	Search Search	
ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z		
Refine My Results	203 Results	Quick Picks
Provider Format	ABI/INFORM Complete (1)	CINAHL Complete
 Abstract and Indexing (151) E-Books (20) Images (12) Maps (1) Newspapers (11) Point of Care (14) Reference Tools (8) Streaming Media (10) Style Guides (3) Test Preparation (1) 	AccessMedicine Multimedia resource for medical education and clinical practice	Nursing and allied health database PubMed Biomedical and health information
	AccessPharmacy (1) Multimedia resource for pharmacy education and practice	Micromedex 2.0 Clinical decision-support databases
Subject • Accountancy (8) • Anthropology (9) • Appalachian Studies (10) • Archival Studies (1) • Art (9) • Audiology (9) • Biological Sciences (27) • Business (21) • Cardiopulmonary Science (24) • Career Resources (2) • Chemistry (15) • Communication Studies (6)	Accounting and Tax Current accounting, taxation, and financial management information for professionals	JSTOR Comprehensive academic articles and E-Books
	ACM Digital Library Association for Computing Machinery (ACM) publications online	PsychINFO Peer-reviewed literature in behavioral science and mental health
	ACS Style Guide	feedback



Additional Features – Integrated Help Desk

- Another feature that makes this system more useful for our users is integration with our help desk ticketing system.
- This allows users to provide feedback if there is a problem with a resource, and automatically provides information about the resource to allow quicker resolution.

America History and Life 1

About this resource:

History and culture of the United States and Canada. This bibliographic resource provides a robust source of information focusing on the history and life of the United States and Canada. Selective indexing includes over a thousand journals dating back over 55 years. This source has proved to be an important bibliographic reference tool for students and scholars of U.S. and Canadian history.

Provider:

EBSCO

This resource covers the following topics:

Appalachian Studies, History, Philosophy, Political Science, Regional and Community Studies, Women's Studies

Report a resource error



Database Details

ABI/INFORM Complete 1

Business research database

ABI/INFORM Complete ① /display/title

About this resource:

Business research database Comprehensive business research database including full-text journals, trade publications, market reports, industry reports, working papers, dissertations, business cases, and conference proceedings.

/display/description

Provider: ProQuest /display/lds10

This resource covers the following topics:

Accountancy, Business, Economics and Finance, Management and Leadership, Marketing, Public Administration, Public Health, Regional and Community Studies, Sport Leadership and Management

/display/lds15

Report a resource error



Lessons Learned

- A-Z Go Live -> Shortly
- Updates made to MARC takes 24 hours to reflect in Primo and A-Z list
 - URL permalinks help
 - Faster updates Develop A-Z using Alma API
- LibGuides Still working on exports
- Goals: Overall Success



Questions?

- Travis Clamon (clamon@etsu.edu)
- Jacob Kindle (<u>kindle@etsu.edu</u>)

http://libs.etsu.edu/sherrod/databases

