

# DBIS USER WORKSHOP - REPORT

Feb. 2, 2021, UNIVERSITY LIBRARY OF REGENSBURG

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## **Methodology**

On Feb. 2, 2021, a six-hour virtual workshop with representatives of individual user libraries was conducted, in order to elicit user requirements to be considered in the further development of the database information system ("DBIS"). The following section describes the goals, structure, and participants of the workshop.

### **Aim of the action**

As stated in the DFG application, the user workshop should include as diverse and numerous requirements as possible from the user community. These should be used later, initially without evaluation, prioritization, or assessment of feasibility, as input for a collected catalog of requirements.

On the one hand, a revision of the previous implementation should take place during the measure and current deficiencies of the current system should be discovered. On the other hand, previously unknown requirements that had not been voiced in the previous years of operation were to be explored. Last but not least, conceptual proposals for meeting these requirements were to be developed together with the representatives of the user institutions.

### **Concept**

In the workshop, moderated small groups with representatives of the user institutions were to discuss different facets of DBIS. The topics were only roughly specified and the associated questions were formulated as openly as possible to allow sufficient self-determination on the part of the participants. The moderation was done by one DBIS project member per group and was kept informal in order to give the participants enough leeway. Scenarios for intervention were, if necessary, only the strong digression of the discussion, its hijacking by frequent speakers, or the abatement of the discussion. For the latter case, the moderators were equipped with prepared moderation cards with which they could gently steer the discussion to points relevant to the project.

In the context of the COVID-19 pandemic, the workshop could only take place as a virtual event. For this purpose, the teleconferencing system "Zoom" and the digital flipchart "Conceptboard" were used.

### **Participants**

In order to reflect as broad a spectrum of opinions and needs as possible in the participants, care was taken to ensure a diverse composition. For example, representatives from different types of libraries (e.g. state libraries, special libraries, university libraries) or countries of origin (e.g. Germany, Austria, or Switzerland) were invited to participate. The mapping of licenses of the specialized information services for research ("FID") described in the proposal for the German Research Foundation FID was considered in the participants' ("PA") circle by inviting several representatives from the Competence Center for Licensing ("KfL") as well as another representative from a FID institution.

Initially, a request for volunteers for the workshop was posted via the user libraries' mailing list. Thirty-one volunteers came forward, from which 15 PAs were selected by the DBIS team. Care has been taken to ensure a diverse distribution of PAs in order to cover as many different perspectives and aspects on the topic as possible. Before the workshop, two

participants had to withdraw their participation. They have been replaced by suitable volunteers. The KfL has been contacted directly, offering them the participation of one or more persons. From the KfL, 3 participants joined the workshop.

## **Topic selection**

Candidates of the topics to be discussed were primarily extracted from the DFG application. Likewise, the functional catalog of the existing solution was consulted as well as documents with desiderata collected so far. Last but not least, support emails with reported problems and the previous experiences of the DBIS team members were considered.

In a joint discussion of the DBIS team, topics irrelevant to the workshop were first identified and removed from the topic list. The remaining issues were grouped by the team into three categories and the four issues with the highest relevance were selected from each category. For each of the 12 topics, a question was defined for discussion by a working group. In the case of very abstract questions, additional information such as examples has been added to clarify the question for the participants.

In advance, the team determined which participants were most qualified to answer which question. Small groups were formed that would represent as many different perspectives as possible on the issues discussed. The assignment of topics and groups was sent to the participants several weeks before the workshop together with the schedule via e-mail.

Last but not least, participants were also allowed to contribute their own interests in a dedicated topic block at the end of the workshop.

## **Procedure**

The workshop was started with a short welcome session and presentations on the purpose of the activity. Afterward, the participants were given an introduction to "Conceptboard", a digitally shared flipchart on which the collaborative group work was conducted. In a short warm-up session, PAs were able to gain experience with the tool as well as get into a creative and open mindset.

Subsequently, in three 45-minute topic blocks, each group worked on a specific overarching topic. In parallel small group work with four participants and a moderator, one facet of this main topic was discussed for 30 minutes and the results were recorded on virtual post-its in the "Conceptboard". In the plenary follow-up session, each group presented the most essential results of their work in a short, approximately three-minute presentation. Due to time constraints, it was not possible to have an open discussion about the results; instead, the PAs were encouraged to add their opinions and supplementary points via the comment function on the charts of the other discussion groups.

During the workshop, PAs were allowed to record their own ideas for discussion on an "idea zone." After the three thematically predefined task blocks, the topics with the highest relevance were jointly determined by assigning points and handled in an open discussion block methodically analogous to the preassigned topic blocks.

Finally, a short presentation gave the participants an outlook on the future work on the workshop results, and the participants were bid farewell. In addition to a confirmation of participation, the participants also received a full print of the digital flipcharts. In the community, an anonymized print of the concept board was shared to give people who had not been given the opportunity to participate a chance to contribute their opinions.

## **Evaluation**

The statements on the digital flipcharts were extracted, contained concepts were coded and clustered by members of the project team in a remote card sorting session. The thematic clusters provided the structure for this outcome document.

*Please note, that all citations have been translated correspondingly for improved readability. For accessing original citations, please refer to the German original document.*

## DBIS content

### Admission criteria for databases

The PAs had difficulties delimiting exactly which types of collections and databases are qualified for inclusion in DBIS (e.g. "*Are scientific blogs allowed?*", "*no opacs - why not?*", "*scientific websites?*"...). Only "*sales platforms*" were generally excluded. In general, a catalog of characteristics typically found in DBIS entries was described: peer-reviewed quality ("*peer-reviewed publications*"), high volume, and timeliness ("*search function scope regular maintenance*") characterized an appropriate database in DBIS. Likewise, adequate entries typically had search and filtering capabilities of their contents. The requirement of scientificity was referenced several times but also received criticism for being difficult to quantify ("*What does scientific mean?*"). In addition, it was noted that "*non-scientific sources [...] may also be relevant*" for researchers.

The participants praised the flexibility of the inclusion criteria, which has been proven "*useful [for] special situations*" ("*yes, keep it please*"). The possibility of being able to determine on an institution-specific basis which of the global databases are included for one's own view supports this aspect ("*If there are good ways to decide what should be in one's view.*"). On the other hand, however, there was also a demand for more consistency in the recordings ("*In some cases, e-book packages are entered as digital collections. There should be a precise set of rules*").

It remained unclear who should hold the ultimate authority in questions of the appropriateness of entries ("*Who judges scientificity with this?*", "*Who should be allowed to decide such things?*"). One PA suggested platform administrators for this role.

The participants pleaded for allowing contemporary collection formats, e.g. blogs, in DBIS ("*Definitely. Since the beginning of DBIS, what is available on the Internet has also changed. Blogs didn't exist like that back then.*"). It was also suggested that end users should be able to leave feedback on databases ("*Could you also comment on the entries so that critical views on the entries become recognizable.*").

## Metadata and fields

### Global and local data warehouse

The PAs argued for a **separation** of the metadata into overarching, global data and institution-specific, local data ("*separation continues to be important and useful*"). The global data, they said, is useful to maintain the "*anchor*" of the database. In the PAs' mental model, the local data extend the global data with individual fields ("*modularly append own without changing global data*"). This is also reflected in the fact that many cross-cutting fields are attributed to the global entry rather than the local contribution, e.g. "*publisher*", "*access data*" and "*license information*". However, it was criticized that local entries should not completely overwrite the global ones in certain cases, but rather extend them ("*I would like to refer to the category 'User Notes' Global and Local. At present this category cannot be used properly with local, since one does not get information which is registered with global any longer indicated if one would deposit info with the local user notes. So at the moment this field is practically not usable.*") It was noted that other institutions could benefit from its "*re-use*". In general, a uniform naming was requested for the field names for global and local fields ("*name fields the same in local and global and also the same in the user view*").

Regarding the global dataset, it was criticized that local changes were often mistakenly declared globally (*"Problem: Global data is changed that does not apply to everyone"*). To solve the problem, clear notices were desired for critical operations, for example, global deletions (*"Warning notices for critical changes would be desirable (e.g., for global deletions)"*). There was also a request for more regulation and quality control in the entry of global data (*"More regulations / liabilities for global entries for quality control"*).

For the local dataset of an institution, as already stated, the most flexible, individual field assignment possible was desired. Here, the community also wished for the possibility of an institution-specific, freely assignable field for own notes (*"Create own collection: another field for own entries in the middle. E.g. for short info about the content of the database."*). Local fields should also be searchable (*"make all local fields also searchable"*, *"Local fields are currently used to improve search"*).

## Data modeling

Various suggestions were provided by PAs to improve the data model in DBIS. First, it was requested to change the content field from free text to structured metadata. It was also suggested to infer the contents of the fields *"Signature/ISSN/ISBN"* and *"Publisher"* from the global data set instead of defining them locally. PAs also requested the possibility to recommend similar databases, e.g. as a local field (*"Link or reference to similar databases"*), as well as the mapping of partial products of databases (*"Permalinks to partial products"*, *"Mapping of packages within databases?!"*, *"Mapping of 'partial databases'"*, *"Linking of partial databases"*). Furthermore, a revision of the access model was requested to avoid duplicates (*"Top entry-> attached to it the different access modalities"*, *"With Oxford databases, we had to attach to six different items to get our licenses"*). *Items to show our licenses (overwhelms the end users). Conversely, Juris, for example, exists only once, and how do we link our individual licensed modules?"*). The community added that it would also be necessary to be able to provide several access entries for an entry (*"Admin: with the local entries I wish myself a field with reference of a further URL address, visibly in the view"*).

Additional fields requested:

- Version / editing history
- Terms of use
- URL links
- Evidence of owning libraries
- Additional license information
- Keywords
- ZDB ID
- Regions
- Former titles

For fields with a predetermined input range, for example, *"database type"*, an extension of the value range was proposed (*"collection of extension needs, e.g. for database types"*, *"full-text bibliographies standards"*).

It was suggested to work out a multi-layer data model, which - depending on the authorization level of the requesters - adds different fields (*"Extended data model: who sees which data (layer model) e.g. for license information"*).

## Metadata management

Concerning the creation and processing of the metadata contained in DBIS, numerous suggestions were made by the participants.

When creating entries in DBIS, better user guidance through the creation process was requested. On the one hand, the creation process should be processed step by step ("*modular entry process/ in steps/ thematically bundled*") and an English translation of the contents should be automatically requested ("*yes exactly. maybe in this context also clarify that when creating a new database, an English text is immediately created.*"). Further means of assistance were requested, for example, a checklist for the creation process ("*A checklist would be helpful to fill in -> more user-friendly*") or the possibility to ask colleagues or a central editorial office ("*Central editorial office (ZDB) -> centered knowledge, assistance*", "*Input from other institution*", "*Mutual control -> make decisions -> assistance/ additional information*"). In general, the need for quality control was frequently expressed, for example in the form of control by colleagues ("*Mutual control -> making decisions -> assistance/ additional information*") and automated detection of duplicates before they are created ("*Request: warning before duplicates are entered*"). Control by a central editorial office was also listed but also assessed as "*inflexible*" and "*time-consuming*". Instead, much value was placed on good cooperation between the individual institutions ("*Collaborative work*"), which should be supported by appropriate features such as an activity bar or mail notifications ("*Automation / notification by e-mail*", "*Information on the DBIS view directly / message bar*"). Another request by the PAs was the automated data import from ZDB, or uploaded PDFs ("*PDF upload to add content (e.g. which parts of DB licensed)*").

With regard to the process of maintaining database entries, similar requests and suggestions were expressed by the participants. With regard to the collaboration model, all users should be capable of editing databases, but in the best case, changes should be able to be reviewed by qualified experts ("*Editing should be allowed for everyone, but a contact person should have an overview (quality assurance)*"). However, it is important to define clear, specialist responsibilities ("*define responsibilities for specialist areas if necessary*", "*contact person, just like for EZB packages*", "*responsibilities should be better defined on the FID side --> decision from e-mail discussions*"). In general, when changes are made to global data, potentially affected users should be informed in order to make adjustments in response to the change ("*If one knew who changes what in global data and which follow-up activities have to be done (e.g. pass on ZDB changes)*"). This information flow for "*license changes*" and "*changes to data in DBs*" would continue to be "*desired and sensible*", but it would be important to distribute the data in a targeted manner via thematic, subject-specific mailing lists, instead of flooding the main distribution list with messages ("*problem with the general change emails, separate mailing lists with notes/changes by subject area*", "*changes are communicated via email and you have to go through all the emails*"). "*License changes*" were a typical editing scenario in this regard. It was also noted that changes, rather than in individual emails sent asynchronously, could be reported as a collected report ("*mailing lists receive mails collectively, not all scattered throughout the day*"). In general, it is important to inform institutions and individuals who obtain data from DBIS about updates to the data ("*how to ensure that updates are included*"). Besides, the user-friendliness of entry management must be further improved: On the one hand, critical operations must be sufficiently protected against accidental execution ("*warnings for critical changes would be desirable (e.g. for global deletions)*"), on the other hand, the previous input of HTML source code should be avoided

and, if necessary, a WYSIWYG editor should be preferred (*"formatting HTML difficult Word-based (with HTML in the background) would be easier", "no more HTML code -> editor"*). Likewise, it was criticized that some fields were not adapted in their size to the foreseeable extent of the answers (*"we have locally still registered, but field often too small, if there are several institutes"*). There was also a request for the capability to display an overview of entries belonging to one's own institution (*"An overview of one's own entries facilitates the necessary updating"*). Furthermore, it was demanded to automatize time-consuming and simple tasks, for example, the examination of incorrect links (*"Linkchecker not functioning DBses filter out if necessary with automatic information to offerers"*). Likewise, it was requested to automatically display an appropriate UI element (SFX-Button), if a database integrates a link resolver (*"Default to click, if link resolvers (e.g. SFX) are merged in the present database"*). The community added that the system creates the link for the resolver automatically in the optimal case (*"Simply check the database and automatically the SFX button with the text / link of the library is inserted. It would save a lot of maintenance work"*). The topic of quality assurance permeates most of the contributions of the participants on the management of metadata. On the one hand, the control should be done collegially and democratically (*"Responsibilities should be better defined on the FID side --> decision from e-mail discussions"*). In case of discrepancies or ambiguities, the collaborative work should be supported by the consultation of expert contact persons (*"Changes should be possible by all, but one contact person should have an overview (quality control)"*).

## **Exploitation rights**

The participants agreed, that database metadata should be freely available (*"Yes, definitely", "Libraries stand for free knowledge, so should DBIS!", "How about a CC0 license on DBIS data?", "Metadata ? should be freely available; how can it be ensured that updates are included", "There is no question that database metadata should be freely usable"...*). The open availability of metadata is essential for data exchange (*"for convenient exchange, metadata should be available"*). However, one PA noted that communication of content exploitation rights for contributors must be clear and, if necessary, consent of subsequent use must be given (*"the legal situation must be clarified, after the consent, data sharing makes sense."*). However, there was a lack of clarity regarding the permitted usage scenarios for data obtained via the interfaces or entered into DBIS (*"Is anyone allowed to simply re-use DBIS metadata? For example, for catalogs, ERM systems, etc.", "We already reuse data from other sources in DBIS; does this have to be marked?"*). Interest was also expressed in the circle of users of the metadata (*"It would be interesting to know who then uses this (meta) data"*).

## **Applicaiton Usage and UI**

### **Layout**

The customization of the layout for a DBIS view was still perceived as a useful feature by the PA (*"positive: adaptation/selection of layout for own library"*). Both the self-selected layout and the general usability of the page must be maintained on all possible end devices (*"adaptability of the display on all end devices on the website to the corporate design of the university", "cross-platform everything must be readable in different fonts"*).

The community indicated that it is important to link from each local view to the overall holdings (*"On the DBIS interface owned by an institution (i.e., only a selection of databases),*



*there should be a permanent and present reference to the overall DBIS holdings. Many people are not aware of the scope and function of DBIS. This would be quite important").*

The community also requested the addition of an availability legend similar to EZB on the right margin of the page ("a sidebar of the navigation with icons for reference works would also be conceivable.").

## Usability

The participants criticized the lack of usability in the current interface. End users would often misunderstand DBIS as a literature database ("*Making it easier for the user to know where they are. During the training courses, people often search for their search term directly in the Quick Search field because they think they are already in the database*"). Often, first-time users would already be confused and overwhelmed by the DBIS home page ("*too much information for us of the first page. Users are always very confused first time in training*"). It was recommended several times to provide instructions for first-time users ("*offer help tutorial for the first start*"), for example in the form of videos ("*embed videos?*", "*link videos to instructions*"). Also, "*slimming*" the home page was generally desired. But not only the first impression would be important: Deficiencies were also discovered in other aspects of the user interface, for example, the link to the database on the detail page was not highlighted clearly enough ("*Make the link to the database clearer, e.g.: Go here to search the database*"). It was also suggested to be able to display databases not licensed by one's own institution in the search results if desired ("*basically consider whether databases are also displayed in the general overview that the institution has not licensed. (Comparable with red titles in the EZB). It makes sense to be able to control the display.*").

Not only end users should be better supported in their use in the future, but also administrators. It should be made easier for them to get started using the system, which is particularly difficult "*especially for smaller libraries*". "*Training*" would be, even if "*costly*", a possibility for the better education of newcomers. Alternatively, "*tutorials*" or "*checklists*" for data maintenance would be conceivable, as well as "*registration instructions*". A "*Wiki with FAQs*" should also be used to preserve knowledge.

## Subjects

The PAs contributed diverse requirements for an improved model for subjects, which was discussed with regard to many aspects. On the one hand, some PAs advocated a continuing classification according to the "RVK" (Regensburger Verbundklassifikation), while others described the classification as being associated with "*problems*" and requested a "*detachment from the RVK*". Not only in this context, a "*faceting*" of the subject list was demanded, which could be specialized in "*several stages*" (see also: "*Options for users to identify relevant databases more easily: e.g. short teaser next to the title or further subdivision of extensive subject areas, e.g. history*"). The community also calls for subject subdivisions by subgroups ("*too many subject areas, or collapse or open individual subject areas, then show further subgroups first.*"). However, this approach was also criticized: Such a solution would be time-consuming and hardly feasible "*without subject specialists*". In addition, a similar effect could be achieved by means of a keyword function. In the community, a single-level grouped view was also mentioned as an alternative, in which, for example, "*biology, chemistry, physics [...] would be summarized as a group*".

Another request was the mapping of "*interdisciplinary subject areas*". Reference has already been made to a feature included in DBIS, the creation and maintenance of collections, which could provide similar functionality ("*Collections?*"). Collections were found very useful by several PAs and further preservation of the feature was demanded (e.g. "*module collections for local subject areas should be preserved*").

The cause of the discussions was the fact that the current collection of the subject list did not always meet the individual needs of the institutions ("*subject list not optimal for everyone flexible subdivision (also interdisciplinary,)*"). For example, it should be possible to register "[*more*] additional subjects" locally for a DBIS view, they said. The community also suggested that it should also be possible to "*hide subject areas not needed at the institution.*" It also has to be possible to register new subject areas globally: Candidates are to be discussed and approved "*by the community*".

On the other hand, the user interface for the subject overview should not overwhelm users with an excess of entries. Instead, a "*tidier interface*" was requested. The community suggested highlighting collections in the subject list ("*Color-code own collections in the subject areas*").

## Authentication

With regard to authentication for access to licensed resources, the current solution was criticized for the fact that the process was "*often unclear*". PA requested that the authentication mechanism should be included in the metadata of a database ("*field in DBIS, in the local data, where you can enter whether Shibboleth, EZProxy, VPN etc is possible*"). Also, a single sign-on was desired for databases accessible with the same authentication mechanism. Shibboleth and EZ-Proxy were mentioned as concrete systems for authentication. There was general support for adopting recognized standards with regard to authentication ("*Strengthen the position of libraries DBIS community for standards e.g. with Shibboleth*").

## Features of DBIS

### Research

For the management of access types and availability, the participants would like to see filtering by license and access types ("*Filtering by license type is desirable*", "*Filter complex access types*"). It should be possible to map complex access types when databases are created. In addition, it should be possible to filter by individual FID.

Concerning the search for databases, filtering several access types should be possible at the same time.

After a search, the license and access types should already be displayed in the overview in the result list ("*Show license type / access type already in overview (saves search in list)*"). Here one could take an example at the EZB and provide a traffic light-style visualization ("*A kind of traffic light e.g.*"). It should be clear what is licensed and what is not. A teaser, e.g. on mouseover, can show the content of the title ("*Mouseover, for example, to see the content of a database without having to click on it*"). Because the current title hit list is only little meaningful ("*Hit lists pure title little meaningful (+ teaser)*"). Also the link "*Please also note the interdisciplinary databases*" at the end of the title list is too inconspicuous.

For the user view, it would be worth considering whether a pop-up window with a data display is possible since not all data is immediately relevant for the user ("*Data display in hits from*").

*user view: not all data important (e.g. license information) Pop-up window with data display possible?"). License information is too detailed and too prominent.*

The search feature should support special characters and offer capabilities to search for multiple access types simultaneously, similar to filtering. The data model behind the search entry should be changed, all local fields should be searchable and new fields such as keywords should also be considered (*"make all local fields also searchable", "change data model behind search entry"*). The current *"Quick search"* is misleading because it should rather be *"Which database are you looking for?"*. In addition, the simple or quick search should be supplemented by a singular search slot, so as not to be overwhelmed by the number of hits. The community also demanded a search slot that can be integrated into other websites (*"A search slot to be integrated into websites."*).

If no hits are returned for a search for databases with a certain licensing, a search in the overall view should be linked to see which institutions may offer access (*"In case of negative search for DB subject to licensing in own view: Automatic repetition of search in overall view (e.g. 0 hits, but link to hits from overall view -> see which institutions offer access to DB)"*). A global renaming leads to users still searching for the original name and getting the wrong results (*"Globally, Westlaw was renamed to Thomson Reuters Westlaw, but end users search Westlaw under W and never under T."*).

## **Admin features**

According to the opinion of the participants, the title entry should be more structured. Previous titles (*"other titles"*) should be highlighted in the entry and make a distinction clear. The community also criticized the administration interface as *"somewhat overloaded for very simple use [...]"*.

In the total stock, it should be displayed which titles have already been activated (*"It would be practical to simply have a check mark in the administration for each database, for visible or not visible. Everything else can then be done as usual, if you need it. This would go along well with a thematic, alphabetical list of all databases, where you can also see directly what, for example, is freely available so that you can simply traverse the list and check entries"*).

On the one hand, it is not clear to the participants where they are currently located in the administration. A better modularization/demarcation of global and local could be helpful. The community would also like to be able to change global entries from a *"neutral interface"*. In addition, none of the participants would know, what actually happens, if a title is deleted. Another request would be that after opening, the option *"is displayed to the user"* is not automatically displayed. The community also requested to search for databases by their ID in the administration view (*"Admin: ID search of the database should be possible"*).

## **Content Management**

Content management includes any administration of data in DBIS that is not directly related to the maintenance of database entries. Participants were particularly interested in the link back to the home library page (*"I think that's important so that you can get back to the library."*). Links to other local library services, in general, were also relevant (*"We have links to the catalog, EZB, external access, explanatory videos, contact form."*).

It was criticized that a separate DBIS rubric for *"News"* is currently only little used (*"News for us not necessary; we link there only to the current on the homepage"*). Likewise, editing of

formatted text over HTML source text was described as little intuitive and complex (*"Avoid HTML formatting if possible"*).

A request was expressed for multiple responsible persons to be entered as contacts in the future (*"Make several entries possible as contact persons."*). Editing of formatted text via a *"text editing tool[...]"* was also desirable.

## Statistics

According to TN, at the moment the statistics are kept simple and purposeful (*"pure information"*).

Nevertheless, the participants would like the statistics to include hits by the provider and not just by title (*"*

*Statistics also include hits by the provider and not just by title. This also exists in the EZB"*).

Also, multiple accesses to the same database within one session should be registered as a single access. Tracking of session length would also be desirable. The community noted that the number of sessions would also be relevant (*"Evaluate statistics by sessions and hits/clicks on the database"*). It would be nice to be able to compare the statistics of the institutions with each other and to introduce counter statistics (standardized usage statistics) and sushi metadata.

The community further noted that the *"annual statistics"* should also be displayed broken down by *"months"*.

## TOP databases

Top databases are perceived to be very useful and, according to user statistics, are also the databases that are used the most (*"Top databases: are the ones that are also used the most according to statistics. We have them for almost every subject area. They are determined by the subject specialists"*). They are often determined by the subject specialists. One suggestion by the PAs was that users should be able to compile their own top databases (*"Can users compile their own top databases?"*).

## Collections

Local collections are perceived to be important and frequently used. The creation of local collections should definitely be maintained. FID licenses should be created in a separate collection.

The community also suggested that end users should have the capability to create their own collections of databases, similar to a list of favorites (*"An idea for e.g. students: an individual collection of databases. I.e. a user account can be created and the possibilities to save databases as favorites. If you can't provide a data storage for this, a solution could be done via cookies or similar files, in which the selected databases are then stored on the client side, so that you get them later with the file in DBIS again automatically, displayed in an overview."*).

# Data exchange & interfaces

## Data exchange partners

A broad spectrum of possible exchange partners and scenarios was mentioned by the participants. Better integration of DBIS into the national or international library infrastructure was generally desirable (*"yes, more cooperation and exchange with other systems"*).

A frequently referenced scenario was data exchange with LAS:eR. The primary purpose of the scenario was the centralized management of consortial licenses (*"Should at least all consortial actions be executed via LASER?"*, *"LAS:eR - consortial manager for Austria, Folio -> connection DBIS"*, *"LAS:eR -> determines which data can be managed centrally"*). It was also noted that the usefulness of the integration generally depends on the number of libraries using it (*"Do they all use LAS:er?"*). International use would most certainly require the integration of further, local systems for consortial management, for example, the *"consortial manager for Austria"*.

Another relevant data exchange partner is the ZDB, which registers databases as well as journals. Currently, a manual data exchange already takes place (*"ZDB - DBIS exchange: currently manually; via ZDB in the catalog"*). Therefore, an automated import of databases from the ZDB into DBIS (*"Import databases from ZDB"*), or *"[at least an] alignment between DBIS - ZDB"* is desired. In general, it is desired to link contents of DBIS with their counterparts in the ZDB (*"Field with ZDB ID"*, *"How to link ZDB --> Austria, Switzerland? International; in Austria linking to ZDB seems to be available"*), or to catalog entries directly in ZDB (*"Cataloging rather in ZDB and transfer to DBIS?"*, *"Justification: integrating resources according to RDA -> databases should be in ZDB"*). The inclusion in the consistently edited ZDB is not least an effective instrument of quality assurance (*"Quality assurance through inclusion in the ZDB"*). However, there are also opponents to this idea among the community that see risks in integrating DBIS into ZDB: The rigidity of ZDB endangers the flexibility and democracy in DBIS (*"One thing, however, worries me a bit. A role management system is being considered, and a restriction on the permissions of DBIS administrators. In my opinion, one of the biggest advantages of DBIS and EZB so far is that as an administrator you have the right to change everything without having to notify to someone first, to make correction requests as in the ZDB, which are then processed at some point. This is unnecessarily annoying. I really hope that there will be no restrictions in the future. The fast, uncomplicated modification and adjustment of entries is very important to us [...]. It is, however, no problem to indicate, which institution or person has issued which changes."*). In addition, according to the community, the exchange with the ZDB also requires an update of the linked library catalogs (*"If the title record is to come from the ZDB, then you also need a data exchange with the catalog. Above all, also that old loads from the catalog are then automatically taken out."*, Note: the statement seems contradictory - an inclusion in/forwarding to the ZDB already enables an automatic update of the linked library catalogs, possibly misinterpretation?).

Discovery systems ("DS") were also mentioned as a relevant partner for data exchange, for example for automatic inclusion of databases in DS and to refer to an index of the database in DS if necessary (*"not all databases in discovery system --> how to refer to DBIS! Manual currently, DBIS negative list, automated Recommender"*, *"Info in DBIS if database is indexed in DS (and more details about it - which state, all metadata?)"*). Potential target systems are Alma (*"for Austria also connection to Primo/Alma desirable"*, *"yes, show metadata also in e.g. ALMA/Primo (but no content from DB)? Would that be possible? Poss. also with information*

*whether freely accessible or licensed") or Primo ("yes, show metadata also in e.g. ALMA/Primo (but no content from DB)? Would that be possible? Ev. also with information whether freely accessible or licensed") and Ebsco ("Ex. - MLA always integrated in Primo, now from Ebco --> competition, no longer urgent"). Also, the library management system FOLIO should be connected to DBIS ("Folio --> connection DBIS").*

An interface to link resolvers, for example, SFX, is also desired. DBIS should automatically recognize support of resolvers in its entries and indicate whether access via link resolver is possible (*"Default to click, if link resolvers (e.g. SFX) are included in the present database", "If DB is SFX capable: Change at only one place changes at all concerned entries"*).

Regarding FID-licensed resources, an outgoing link to the Fidelio system would also be desirable (*"linking to Fidelio would be already (rather data exchange)"*). Furthermore, as already mentioned, the integration of *"COUNTER/SUSHI statistics"* into DBIS was also desired. Last but not least, the *"providers"* of databases were also mentioned as possible data exchange partners, e.g. to report broken links.

## **Content to be exchanged**

It was not always clear to the participants which data should be exchanged concretely (*"Question: What do you want to reuse at all?"*). Mostly, data to be exchanged was unspecifically referred to as *"metadata"*, also specifically the exchange of licensing information was requested (*"yes, show metadata also in e.g. ALMA/Primo (but no content from DB)? Would that be possible? Poss. also with information, whether freely accessible or licensed", "info in DBIS, whether database is indexed in DS (and more details about it - which status, all metadata?"*).

For simplified integration into the ZDB, RDA-compliant cataloging was required (*"Justification: integrating resources according to RDA -> databases should be in ZDB"*).

A web interface in REST format was requested as the format for data exchange (*"Interfaces?", "Rest-API"*). In any case, it was important to use encodings compatible with the queries (*"Difficulties of Unicode when searching in Alma and similar software is known"*). The community also expressed the need for an Excel export for further processing on site (*"The ability to export title lists to Excel for further processing would be very helpful."*).

More generally, it is essential to avoid redundancy with other systems (*"where is cataloging done?"*). Optimally, effective data exchange then also avoids redundant work (*"interfaces to library systems would prevent duplicate cataloging work."*).

## **Identifiers**

Resources offered in DBIS must be unambiguous and permanently addressable for appropriate data exchange (*"Permalink for recording to deposit in other systems (e.g. standard in many OPACs)", "Permanent links", "In total holdings further indicator for identification"*).

In this context, the use of common standards data, for example from the *"GND"*, was also desired.

Furthermore, entries registered in DBIS must also be able to link to their counterparts in other systems (*"linking to Fidelio"*).

# Cooperation

## Roles

Users agreed that additional roles are needed. Specifically, e.g., supraregional licenses should only be created by authorized persons, but then they should be maintained collaboratively ("*Who is allowed/should enter FID licenses at all? Clarify competencies!*"). It is unclear who can and may make decisions on the "*scientificity*" of individual offerings. One suggestion was the involvement of subject specialists for a more solid argumentation ("*Changes should be possible by all, but one contact person should have an overview (quality control)*").

It is also important to have a central editorial office that can support questions and the existing super-administration that allows the Regensburg UB to adjust and support settings if necessary. Super-admins for a smaller scope, e.g. cooperating institutions or subject areas were also suggested ("*Super-admin I think is good. One who is responsible for a subject area, for example.*").

## Collaboration

The main problem identified by users was collaborative work on metadata. Examples are changes that need discussion (but do not elicit reactions from the community), a consultation with subject matter experts (which do not exist for DBIS), or responsibility for changed information ("*Communication with subject matter experts for specific topics/ambiguities*", "*Scenario II: Change log in which changes are "low-threshold" cross-checked*"). Above all, democratic cooperation was positively emphasized.

The modification of subject areas was also addressed ("*add further subject areas after consultation with the community*"). A special case of this problem was presented by a PA, where several sub-institutes of an institution shared a DBIS instance and the databases relevant for the sub-institutes were modeled as collections. The PA expressed the need for setting up sub-levels of an institution.

## Communication & channels

The topic of communication was widely discussed. Especially regarding the existing mailing list, there were very different opinions ("*e-mail lists laborious to look through*", "*To inform all is often useful! [...]*", "*Some questions reluctantly via list*"). The possibility to address only impacted institutions or to categorize emails was suggested as a solution ("*Define the subject of emails e.g. [DBIS-FID]*", "*[...] Practical would be to inform only affected*"). The community requested to provide a link to the affected database in the respective e-mails ("*Please include the URL in the e-mails - similar to EZB - this saves work*").

An alternative would be a kind of forum in the DBIS administration, in which discussions could be better led and if necessary notifications take place ("*internal notifications system: TicketSystem (work takes place in the system) (Bsp. Confluence)*").

An annual "*user meeting*" such as that of the EZB would be perceived positively. Opinions differed on digital or analog on-site in Regensburg ("*Application meeting: Yes, but digital! Traveling there unnecessary...*", "*Valuable as lecturers: Direct feedback from users!*", "*Alternative: Traveling is also nice :) Maybe hybrid?*").

Regarding the communication between DBIS community and users, low-threshold possibilities for contacting (with an automated attachment about the currently viewed database) and

reporting broken links were suggested ("*Communication with users: e.g. feedback "link broken" or "text incomprehensible"*").

Lastly, it was also noted that the Regensburg DBIS team was "*[...] approachable, fast & competent*".

## Quality assurance

Quality assurance was equally important to the users ("*Data quality as an important aspect*"). Automated procedures were suggested, including link checkers ("*check links in the text*") and - a major concern - a duplicate check.

In addition, there were suggestions for manual quality assurance, e.g., release with approval ("*change only after feedback*"), subject responsibilities ("*subject supervision of individual libraries*"), or a central editorial office. One person also suggested that databases could only be recorded in the ZDB and then transferred to DBIS, as there were already stricter control mechanisms there ("*quality assurance through recording in the ZDB*").

## Internationalization

Regarding internationalization, two major problems were described. First, the handling of supra-regional licenses and platforms that exist only in certain regions ("*terminology different (e.g. FID only in Germany)*", "*How linking ZDB --> Austria, Switzerland? International; in Austria linking to ZDB seems to be available*"). Second, the language barrier, both in terms of textual representation ("*Please check. Difficulties of Unicode when searching in Alma and similar software is known*"), as well as metadata ("*content description always in German or can a default English abstract be used if the database provides English materials. Possibly also other languages?*") and especially the admin communication ("*coordination of different language participants difficult*").

It was noted from the community that pictograms or graphics could facilitate internationalization if necessary ("*Pictures are a substitute for multilingual versions of the subject overview.* ").

Opportunities were cautiously named ("*advantage would be that more DB would be created / included -- enter universal texts > community strengthen*"). It was also noted that marketing is important for addressing a new market ("*It needs marketing tools (and social media?)*").

## Licensing

### Licensing aspects

Licensing information is important knowledge for libraries about how the product can be used ("*Licensing information: who has access, what is the access route?*").

License types that should be considered in DBIS according to TN are the following:

- Supra-regional licenses
- Nation-wide licenses
- Campus licenses
- Free licenses
- FID licenses

FID licenses that apply to multiple libraries are particularly important to PAs. FID licenses should appear "*as an access type in the general section such as National License with appropriate generated notice text and link to the Kf website*".

They should be visible to all institutions ("*global view into local*").



For the respective FID licenses, there should also be a link to the FID page. In addition, it should be possible to filter by individual FIDs.

Supraregional licenses should be visible in the global view ("*Supraregional licenses in global view*"). They should be able to be transferred to the local view similar to free databases ("*Supraregional licenses analogous to transfer of free databases?*").

Free licenses should be subdivided into freely accessible and free licenses ("*Free licenses: freely accessible vs. free licenses - subsequent use*").

For the activation of national licenses, the idea of a future consortium administration of licenses was mentioned ("*Activating national licenses: Consortium administration?*"), which could be used for the central administration of FID licenses, among others.

Regardless of the license types, a major problem is the duplication of databases. Only because of different licenses databases should not exist multiple times ("*No duplication only because of different licenses - rather database as an object, license "attach"; a product should be able to be assigned multiple licenses ("Different licenses on one product")*").

As already noted below "*Modeling*", the content field, which is mainly used for remarks on licensing so far, could be split into several fields to better structure the content ("*License information should be handled in a more differentiated way*").

A graphical representation of the type of licensing would also be desirable. This could show which institutions have licensed which databases and how ("*For example, should structured information be provided about which institution has licensed which databases and how?*"). - *Yes. I think this is helpful*"). Structuring would also allow the license information to be handled in a more sophisticated way. In addition, the license information should be machine-readable, which would be useful for a future API.

Possible sub-products or sub-collections of a database should not only be modeled in the metadata but should also be able to be licensed separately ("*sub-products? sub-collections permanent links*").

## Access and access types

A current problem of the PA regarding the access is the confusion regarding the access types. It is not immediately obvious "*which database has which access*". A clear color coding can provide a quick overview of the access types. In addition, the participants are unsure where to enter databases that are no longer available on the network.

The participants would like the access types to be uniform between institutions, as well as between the administration and user view ("*Consistency between the institutions should be maintained (also between the user view and administration in the wording)*"). Access types should be described concisely for users.

It should be possible to create new access types flexibly in coordination with the community. In addition, FIDs should be added as a separate access type.

If a database has more than one type of access, there should still be only one entry for the respective database and not several ("*One DB entry with several access types and not one entry per access type*"); *one participant outlined the following: Access Type 1 (Supplemental info, provider, funding, etc.) | | Access Type 2 (Supplemental info, provider, funding, etc.) | | Access Type 3 (Supplemental info, provider, funding, etc.)*.

In addition, the import of cross-institutional access types (e.g., for lead/cooperative library, FID) should be made possible.

Tips on free databases or campus licenses should be displayed in the user view ("*Tips on free databases or campus licenses*").

Test databases should be automatically hidden when they have expired.

It should be possible to select whether a title is displayed as freely accessible or licensed (e.g. OECD).