

Reference Universe Administrative Module FAQ's

1. What can we do in the administrative module?

There are three main features available in the Administrative Module:

- The Add/Delete function
- Link to Reference Universe Usage Statistics
- Tips and tools for promoting reference in your library

The primary feature is the Add/Delete function, which minimizes the need to get additional library technical staff involved in keeping your *Reference Universe* holdings up-to-date.

You can

- **Add** ISBNs for new titles you acquire, assuming that these ISBNs are currently in the *Reference Universe* bibliography.
- **Delete** ISBNs
 - That you have weeded from your collection or discontinued electronic access to.
 - That appear mistakenly as “held” by your library due to errors in cataloging.
 - For which the direct links in *Reference Universe* do not work as desired.

2. How does the add/delete function work?

There are two options available for adding and deleting titles in the Administrative Module.

- Adding/deleting a title at a time, using the search feature.

To add or delete titles individually, the system is designed to appear largely like the main search screen itself. You can search by ISBN, Title, Publisher and other delimiters, and the engine will allow you to choose to view titles that are held (“local holdings”) and not held (“non-local holdings”) by your library. Once you’ve identified the title you’d like to add or delete, simply click on the box to the right of it and click the button to add or delete the titles.

- Adding/deleting a batch of titles at a time, using a list of ISBN’s

To use the batch feature, simply use the buttons provided under the searchbox to choose whether you’d like to add or delete a list of ISBN’s, copy and paste your list of ISBN’s to the box provided and click the button to add or delete.

Any titles you attempt to add via the batch function that aren't currently included in the *Reference Universe* bibliography will be sent to Paratext to be considered for future inclusion. The ISBN's will be added to your profile so that if the title is added to *Reference Universe* in the future, it will automatically be considered held by your institution.

3. How do I get Reference Universe usage statistics?

Click on the link in the main menu of the *Reference Universe* Administrative Module labeled "Link to Reference Universe Usage Statistics", and then on the link at the bottom of the welcome page that opens up, which will bring you into the *Reference Universe* statistics module. You'll have the option to limit your statistics data by date and view it in four different formats: Graph, Cloud, Log and Counter.

4. How can I promote Reference Universe in my library?

Click on the link labeled "Tips for increasing usage at your library" in the main menu of the Administrative Module to access the Paratext Support site. You'll find more information about *Reference Universe*, ideas for deploying the Reference Widget and some information on using *Reference Universe* with discovery layers.

5. A reference title I'm looking for produced a message saying, "No records were found for your search". Why is this?

While *Reference Universe* coverage is constantly expanding and it's our goal to provide the most comprehensive reference discovery resource possible, there may be some titles in your collection not currently represented in the *Reference Universe* bibliography.

If a title you own and would like to see represented in *Reference Universe* doesn't produce results in a search in the Administrative Module, we recommend that you add the ISBN to your profile using the batch option. This will ensure that the appropriate Paratext contact will be alerted to your interest in the title and that the title will automatically be considered held by your institution if it is added to *Reference Universe* in a future update.

6. Is there a way to track the changes as I make them?

You will receive an email the morning after you make any changes to the system to show which titles have been added or deleted and which titles, if any, aren't yet included in Reference Universe.

The Administrative Module also provides the option to generate a cumulative report, delimited by date, which will show all of the changes made in the Administrative Module for your chosen dates.

Note: Changes made same day will not appear in this report until they take effect in the update run each morning at 2am.

7. Where can I use the administrative module?

As your profile in Reference Universe is tied to your library's IP range, you should only make changes in the administrative module while within the IP range of your library. Making changes in the administrative module while outside of your institution's IP range could result in the changes being applied to the incorrect profile, so it is important that you not do so.

8. Will the changes we make in the administrative module be reflected in our OPAC?

No. The *Reference Universe* Administrative Module only effects the results you will see within *Reference Universe*.

***It is highly recommended that you only add titles to your *Reference Universe* holdings profile that are already -or soon will be-- present in your library's OPAC.**

Any titles included in your holdings profile for which there are not corresponding catalog records will result in non working links from the *Reference Universe* display to your local holdings.

9. Does it add OpenURL metadata to our local resolver?

No, but if you are actively working to populate your OpenURL resolver with your reference titles, your library might want to consider deploying the OpenURL version of *Reference Universe*. Contact support@paratext.com for additional information on this option.

10. Can I get an updated spreadsheet of matches after making a change to my holdings profile?

Yes. Contact info@paratext.com to get an updated version of the *Reference Universe* current matching analysis for your library.

11. How often can I use the administrative module?

It is available 24/7, 365 days a year, and can be used at any time. The system caches all changes made by all libraries up to 2 a.m. Eastern the following day.

12. How many people can use the system at a time?

Each Reference Universe customer will have one account for making changes to

your profile, but as many administrators as you deem appropriate can use it. It is recommended that only one user make changes at a time.

13. Can I get back to Reference Universe when within the Administrative Module?

If you'd like to return to searching in *Reference Universe* from within the Administrative Module, you can click on the words "Reference Universe" in the top

14. Is there an option to log out of the Reference Universe Administrative Module after we've completed our changes?

When you close the Administrative Module window, you will be automatically logged out. Simply sign in for your next session.

GENERAL TIPS

- When searching by title, be aware that some titles will have names remarkably similar to other titles (e.g. Encyclopedia of Science, Encyclopedia of Science and Religion, Encyclopedia of Earth Sciences etc.), as well as different versions and formats for the same title. Please double-check that the resources you're adding or deleting have the same publisher, year and/or ISBN to ensure that you're making the desired change.
- Using the links to limit by e-resource in the "Location" box can help clean up errors in your holdings profile caused by bad metadata, especially in cases where the issue is particular to certain publishers.
- You can use the batch adding feature to recommend titles to us that aren't currently included and make sure that they're automatically considered held in your profile if we do add them in the future.