What You Can Do to Help Promote Transparency in Discovery -- and Why

NISOPlus

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Ken Varnum & Geoff Morse

NISO ODI Standing Committee

Introductions

Ken Varnum, University of Michigan

- Senior Program Manager
- Started with ODI in 2011
- varnum@umich.edu

Geoff Morse, Northwestern University

- Interim Head, Research Services
- Started with ODI in 2018
- gmorse@northwestern.edu

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Outline

1. Overview of the Open Discovery Initiative

2. Spotlight on Metadata Quality

3. Your Participation: Everyone Has a Role

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History of the Open Discovery Initiative

2011   ODI proposed at ALA Annual

2014   First Recommended Practice released
         Standing Committee created

2017   Revision process started

2020   Updated Recommended Practice released

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Goals of the Open Discovery Initiative

- Define ways for libraries to assess the level of content provider participation and for discovery services to affirm how they use that content

- Help streamline the process by which content providers work with discovery service vendors

- Define models for "fair" linking from discovery services to publishers' content

- Determine what usage statistics should be collected for libraries and for content providers

ODI Standing Committee Roster

Libraries

Marshall Breeding, Independent Consultant
Noah Brubaker, PALNI
Teresa Hazen, University of Arizona

Geoff Morse, Northwestern University
Laura Morse, Harvard University
Ken Varnum, University of Michigan

Content Providers

Bobbi Patham, Springer Nature
Don Sechler, Clarivate Analytics

Maria Stanton, ATLA
Julie Zhu, IEEE

Discovery Service Providers

Scott Bernier, EBSCO Information Services
Jay Holloway, OCLC

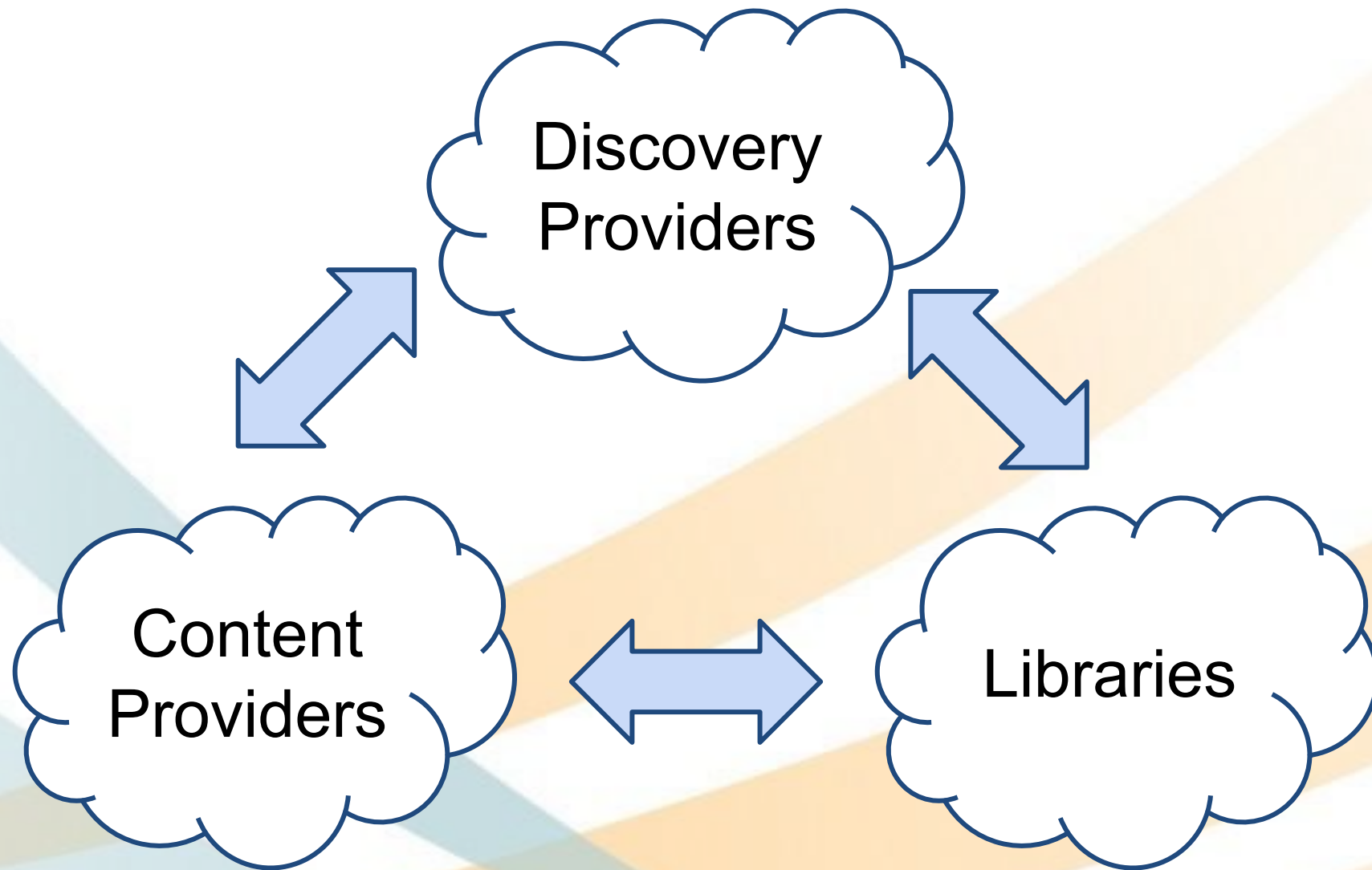Rachel Kessler, Ex Libris/ProQuest

Value Propositions / Benefits
Or, WHAT'S IN IT FOR ME?

- **Libraries/Users.** Finding relevant content is simpler when it's all in one platform. ODI makes it easier to understand which resources are included in discovery services.

- **Content Providers.** Participation in discovery services makes content more valuable and discoverable, increasing usage and decreasing the likelihood of cancellations.

- **Discovery Providers.** Participation in ODI increases transparency, improving customer satisfaction and retention.

We Are All In This Together

- Discovery Service Providers, Content Providers, and Libraries are all part of the ODI Process
- All 3 groups need to provide input
- Each group has an impact on the other, nothing happens in a vacuum
- Like any good stool, needs all 3 parts
- Communication needs to happen between/among each group

Your Participation: Everyone has a Role

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Content Provider Role

- **Metadata Quality**: Fosters sense of trust and enhances overall user experience (especially for advanced users).

- **Fair Linking:** Essential for libraries to choose which platform to link to

- **Open Access:** Where content is open, use the "free-to-read" metadata standard to say so.

- **And more:** See the Content Provider conformance checklist

Content Provider Role

Metadata Quality

- **List of core elements to be provided at a minimum**

Monograph & Serials	Articles/ Documents	Manuscripts/ Unpublished Content	Media Content Image	Media Content Recording	Media Content Motion Image
Nature	Derivation of pluripotent stem cells horn cultured human primordial germ cells	The evolution of cooperative signal comprehension in the domestic dog (Canis familiaris)	Portrait of Françoise en costume tailleur	Panama	The Scent of Green Papaya
	Shamblott, MJ; Axelman, J; Wang, SP; Bugg, EM; Littlefield, J; Donovan, PJ; Blumenthal, PD; Huggins, GR; Gearhart, JD	Wobber, Victoria Elizabeth	Picasso, Pablo	Armstrong, Louis	Tran, Anh Dung; Lu, Man San; Truong, Thi Loc; Yen-Khe, Tran Nu; Delhomme, Benoit; Abril, Jean-Philippe; Dedieu, Nicole; Roques, Jean-Pierre; Rossignon, Christophe; Negre, Alain; Ton-That, Tiet
			VIAE ID 15873	VIAE ID 195226	

- **Publicly disoclose level of discovery participation**

Content Provider Role

Fair Linking

- **Data should be provided to support Open URL resolution, see:**

ANSI/NISO Z39.88-2004 (R2010) The OpenURL Framework for Context-Sensitive Services

Content Provider Role

Open Access

- Open Access items should have "free_to_read" included in the metadata if item can be viewed without authentication
- Start and end data can also be included in free_to_read attribute

<free_to_read start_date="2015-02-03"/>

Discovery Provider Role

- **Transparency** of what is included in Discovery System
- Quality of **Metadata** made available to both libraries and content providers
  - Collection level
  - Title level
- Collection level metadata provided in **downloadable form**
- **Fair linking**
- **Metrics**
- **Open Access**

Discovery Provider Role

Transparency

- ## Collection level metadata

Provider	Market Product	Titles in KB	Titles in Central Index		Number of Unique Records in Central Index		Percent of Records Full-Text Searchable in Central Index		Percent of Records Abstract Searchable in Central Index		Percent of Records from Provider that are Subject Searchable in Central Index		Percent of Articles that are Free to Read		Date of Last Market Product Update (content provider only)	Date of Last Report Update
			Overall	Content Provider	Overall	Content Provider	Overall	Content Provider	Overall	Content Provider	Overall	Content Provider	Overall	Content Provider		

- ## Title level metadata

Title	Standard identifier(s) e.g., ISSN, ISBN	Content format	Content type	Dates of coverage (journals) or date of publication	Number of records in Central Index	Percent of Records Full-Text Searchable in Central Index	Percent of Records Abstract Searchable in Central Index	Percent of Records from Provider that are Subject Searchable in Central Index	Percent of Articles that are Free to Read	Date of Last Report Update

Discovery Provider Role

Fair linking

- Do not discriminate based on business relationships in generating results, relevance, or link order
- Allow libraries preference in establishing which platform to link to
- Statement of neutrality in algorithms
- Explanation of business relatioships with content providers
- Link presentation configurable by libraries

Discovery Provider Role

Metrics

- ## COUNTER reports
  - Is content being findable in discovery systems?

  - How effective is the metadata within the discovery systems?

  - Is licensed content being restricted to subscribers?

Discovery Provider Role

Open Access

- Indication of Open Access, Public Domain, or otherwise freely available materials needed for end users.

Librarian Role

Configuration

- Ensure that discovery provider's configuration guidelines have been followed.
- Document all configuration decisions.
- Assign staff to oversee specific areas of configuration.
- Confirm that subscribed content is enabled in discovery.

Librarian Role

Training

- Develop training to meet different users' needs (including library staff!).
- Review all system upgrades even if they are performed by vendor

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Librarian Role

Conformance

- Complete and publish a library conformance statement.
- Follow up with vendor partners on their conformance
- Library advocates increasing ODI conformance for Content Providersand Discovery Service Providers

Resources for Content and Discovery Providers

- Content Provider FAQ

  https://www.niso.org/standards-committees/odi/content-provider-faq

- Implementation Guide

  https://bit.ly/2Wblk7W

- Conformance Checklist Templates & Statements

  - Goal is transparency, not perfection!

  https://www.niso.org/standards-committees/odi/conformance
  https://www.niso.org/standards-committees/odi/completed-statements

Resources for Librarians

- FAQ and Talking Points
  https://www.niso.org/standards-committees/odi/library-talking-points

- Publishers Discovery Configuration Guides
  https://niso.org/standards-committees/odi/configuring-content-providers

- Conformance Statement Checklist
  https://groups.niso.org/apps/group_public/download.php/24607/ODI%20Conformance%20Checklist%20Template_Library_2020.docx

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General Resources

- Website
  https://www.niso.org/standards-committees/odi

- Mailing List
  http://groups.niso.org/lists/opendiscovery/

- ODI Updates
  https://www.niso.org/standards-committees/odi/updates

- Twitter
  https://twitter.com/NISO_ODI

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Thank you! Questions?

https://www.niso.org/standards-committees/odi
odi@niso.org

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