Tracking Link Origins Charge and Work Plan
November 2016

Problem Statement
Libraries strive to improve the ways in which users access their collections. Gaining a definitive understanding of where a user began his or her library experience/search before ultimately arriving at the content licensed by a library is an important factor in determining the value of a platform, how to allocate resources, etc. Publishers, recognizing that users have a number of options for discovering content, supply metadata to various discovery and abstracting and indexing vendors in the hopes of increasing the discoverability and use of the content they create and to which their customers subscribe. Publishers who wish to measure the success of their metadata programs will often turn to web log analysis to track where their users are coming from.

This working group will develop a NISO Recommended Practice, as described below, that would allow libraries, publishers and other content providers to accurately track the sites/platforms from which incoming links originate when they pass through a link resolver.

See the full original work item proposal at: http://www.niso.org/apps/group_public/document.php?document_id=15858

I. CHARGE

1. Objectives:

1.1. Investigate effective and scalable options to allow the content host and individual libraries to determine the original source of the link;

1.2. Provide all parties in the information supply chain with guidance on how to implement the recommended solutions; and

1.3. Provide content hosts with information on how to leverage the proposed solution to obtain more accurate statistics on the source of traffic to their site so that they can more accurately assess the value and effectiveness of their various discovery partners.

2. Project Goals:

2.1. Investigate options for passing the link origin information of the discovery or A&I service to the publisher. The investigation will focus on link resolver pathways, while considering other link pathways, including those making use of DOI/handle servers.

2.2. Produce a report on this technology that will serve as a recommended practice for link resolvers, content hosts and potentially discovery/A&I vendors to implement and take advantage of the passing of link origin information.

2.3. Implement one or more proof-of-concept projects that demonstrate the proposed technique.
3. Specific Deliverables:

3.1. Develop a standard, consistent set of vocabulary regarding all elements involved in transactions and interchanges between sources and targets.

3.2. A documented set of user and data flows to illustrate the current state of discovery-to-delivery link resolution processes.

3.3. A NISO Recommended Practice outlining the recommended approach to passing and using link origin information including common user pathways
   a. Direct links from discovery services to content
   b. OpenURL links from discovery services to content
   c. Proxied links from discovery services to content

3.4. A communication plan for promotion and education.

3.5. One or more proof-of-concept services, with working code and data exchange, to demonstrate the exchange of link origin information using the proposed approach

II. WORK PLAN

1. General Timeline

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
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<tbody>
<tr>
<td>Appointment of Working Group or other Participants</td>
<td>April 2016</td>
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<tr>
<td>Approval of Charge and initial Work Plan</td>
<td>November 2016</td>
</tr>
<tr>
<td>Completion of Information Gathering</td>
<td>January 2017</td>
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<tr>
<td>Creation of prototype/proofs-of-concept</td>
<td>May 2017</td>
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<tr>
<td>Completion of Initial Draft For Public Comment</td>
<td>July 2017</td>
</tr>
<tr>
<td>Completion of Final Draft</td>
<td>October 2017</td>
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2. Information Gathering

2.1. Related standards and initiatives. Provide a list of relevant related standards, who will conduct review, how results will be reported and target completion date.

2.1.1. Previously identified:

   2.1.1.1. Z39-88-2004 (OpenURL standard)
   2.1.1.2. NISO Open Discovery Initiative RP
   2.1.1.3. NISO KBART – KnowledgeBases and Related Tools RP
   2.1.1.4. NISO ESPreSSO RP for authentication/authorization.
2.1.1.5. IOTA - Improving OpenURLs Through Analytics - RP & TR

2.1.2. Recently identified:

2.1.2.1. Key-Encoded Values implementation guidelines

2.2. Research Topics

2.2.1. Description and definition of common user flows from origin (e.g., discovery service) to target (e.g., publisher website)

2.2.2. Understanding of common authentication methods, including

2.2.2.1. EZProxy

2.2.2.2. Shibboleth

2.2.2.3. IP recognition

2.2.2.4. OAuth

2.3. Planning for Communications

Communication will need to be maintained with discovery service providers (through group members), content providers (through group members and broader efforts through community listservs), and libraries (through lists such as Web4Lib, customer-focused listservs for the main discovery platforms, and listservs related to electronic collections)

3. Document Drafting

3.1. Editorial Plan

A subgroup will create a document outline based on the NISO Recommended Practice template, other NISO Recommended Practices, and this work plan. Other members of the working group, or subgroups if necessary, will draft sections of the document based on their discussion and information gathering output. The full group will vet the document and members or a subgroup will edit it to reflect the opinions and perspectives of the group members before it is passed to the NISO Editor for finalization before circulating for public comment.

3.2. Overall Editorial Schedule

Initial working draft: April 2017 [working group]
Content review: May 2017 [working group]
Copy edit review: June 2017 [NISO Editor]