National Information Standards Organization
Open Discovery Initiative Update
Implementation Guide for Content Providers

The NISO ODI Standing Committee has prepared the "ODI Implementation Guide for Content Providers," as a road map to help content providers understand discovery service technologies and increase the discoverability, linkability, and accessibility of their content in these tools. This roadmap is meant to outline areas that content providers may wish to consider as they review their participation in web-scale discovery services. It is important to note that content providers may differ from each other in size, mission, focus, specialties, resources, and more. Each should decide on an approach that suits the needs of their organization.

Conduct an initial assessment
- Review ODI Content Provider Conformance Statement Checklist and assess your organization’s level of conformance.
- Conduct some testing for discovery and linking of content in major discovery service tools.
- Decide whether further systematic investigations are warranted.

Form a discovery service working group
- Designate a discovery service lead who manages and coordinates internal team projects as well as external relationships with vendors, libraries, and other industry stakeholders.
- Secure cross-divisional management buy-in and assemble a cross-functional working group, including members from content and technical units that create content, manage databases, deliver syndicated content and develop software, as well as from business units that manage relations with vendors, interface with library customers, and create analytic reports.
- Divide tasks into four major groups: improving internal data quality and flows, collaborating with vendors, collaborating with customers, and collaborating with industry.
- Make communication a key component, internally and externally.

Improve internal data quality and workflows
- Educate staff about industry best practices, such as ODI, KBART and ALI.
- Secure cross-divisional management buy-in on projects to remediate workflows and data quality.
- Remediate content inventory.
- Remediate elements that are essential for holding, discovery and linking, such as identifiers (ISSN, ISBN, DOI) and Item URL.
- Remediate elements that are important for content discovery and ranking, such as title variations, keywords, subject terms, etc.
- Develop and publish an ODI Content Provider Conformance Statement Checklist.
- Develop and publish KBART II compliant title lists for all subscription packages.
- Create MARC Records for publications as needed.
- Find ways to show value for remediation work on discovery related issues.

Collaborate with library service vendors
- Designate a contact person to coordinate collaborations with all vendors.
- Create and update agreements with discovery vendors.
● Develop working relationships with each of the major discovery services, link resolvers and authentication product vendors. Set up regular meetings or other channels of communications if possible.
● Request publisher accounts to discovery and link resolver tools.
● Audit the performances of publisher content in various vendor-provided tools.
● Work with vendors
  ○ throughout the initial (re-)indexing and normalizing processes;
  ○ on delivering new content, filling in missing content, re-indexing content when necessary, and monitoring/troubleshooting content delivery;
  ○ on linking options and syntax, for direct, DOI and OpenURL linking;
  ○ on improving results ranking in discovery tools;
  ○ on creating configuration guides for libraries.
● Analyze discovery usage reports to show impact of improvements.

Work with libraries
● For initial assessment, visit some libraries, look at their discovery and link resolver configurations, and test the searching, linking, and accessing of publisher content, on-campus and off-campus.
● Communicate not only with public service and collection development librarians but also with electronic resource and technical service librarians.
● Conduct surveys and researches to gather information about which discovery, link resolver, and federated search tools libraries are using, their experiences with configuring these tools, and their difficulties and concerns, primary contacts, etc.
● Promote configuration guides to librarians.
● Conduct systematic auditing of library discovery and linking configurations, if possible.
● Create a system to store and report information about customers’ technology profiles and auditing results.
● Train customer-facing staff on discovery services, link resolvers, and how to answer discovery-related questions from library customers.
● Develop relations with consortia that implement discovery tools across the consortium.

Work with industry
● Study ODI Content Provider Frequently Asked Questions.
● Submit questions to ODI Standing Committee.
● Subscribe to ODI Mailing List.
● Follow ODI Updates Newsletters.
● Distribute ODI Brochure to internal staff.
● Study ODI Content Provider Conformance Checklist Template.
● Post Completed ODI Content Provider Conformance Checklists and submit links to ODI Standing Committee.
● Create Publisher Configuration Guides for Librarians and submit links to ODI.