Dear Colleagues,

The Open Discovery Initiative Standing Committee is taking a brief breather after drafting revisions to the Recommended Practice to respond to comments on the revision and plan educational opportunities after the comment period. The process of drafting the revisions has taken over a year, starting with interviews and surveys, followed by analysis to coming to a consensus on summaries, and finally drafting and then revising. Since you’re likely already aware of the activities that have been consuming our time, we thought we would instead point out the new and revised sections of the recommended practice and give some context to ease the commenting process.

**Metadata Elements Provided to Discovery Services**
While you will recognize the vast majority of the elements in this list from the previous version of the Recommended Practice, we added language and author identifiers as additional metadata elements after consulting with stakeholders on metadata elements they would like to see in discovery services.

The other significant change is the removal of the distinction between “core” and “enhanced” metadata. The former used to only include standard bibliographic metadata elements while the latter included subject headings, abstracts and full text. The latter is no longer considered suggested and is a requirement for compliance. All metadata is now simply called “core.”

**Fair Linking**
This area was previously considered out of scope. We have now added a recommendation for Content Providers to supply data to support OpenURL resolution to the item itself; proprietary direct link metadata should not be provided in lieu of OpenURL metadata.

**Discovery Service Content Listings**
Information gathering revealed that neither Content Providers nor Libraries found our previous reports sufficient for understanding the contents of the discovery index. We updated the recommendation to include both a collection level and a title level report with more granular information.

**Usage Statistics – Recommended Metrics Provided to Content Providers**
Starting with COUNTER 4, COUNTER has issued a standard for Provider Discovery Reports for Discovery Services to send to Content Providers. The Open Discovery Initiative would like to support one standard for usage reports across the industry and is therefore backing the current COUNTER standard.

**Open Access Content**
While the previous recommendation advocated for using the “free_to_read” indicator, ODI is now backing the full [NISO RP-22-2015 Access and License Indicators](https://www.iso.org/obp/ui/#page=/iso/iso-23921/pla/23921.html) recommendation, which had not yet been released at the time the previous version of the Recommended Practice was published. In addition to the “free_to_read” indicator, it calls for a URI that refers users to content license terms for use or re-use.
Authentication
Discovery Services should include user authentication to ensure restricted content is searched and displayed only to mutual subscribers. Discovery Services should also take measures to ensure that only current subscribers activate Content Provider databases in discovery systems. These measures are important for protecting Content Providers who are concerned that participation in discovery will cannibalize their business. While Discovery Services by and large already provide these authentication mechanisms, having them openly attest as such in a conformance statement will hopefully breakdown barriers for Content Provider participation in discovery.

Alternative Coverage Lists
Some Discovery Services provide “alternative coverage lists” that specify the percentage of content covered from collections whose records are not directly indexed from the Content Provider. These Content Providers have expressed frustration that these percentages do not adequately reflect the differences between the records in the Discovery Service and those they provide in their products. If a Discovery Service opts to provide such a report it should note that the content is not being indexed directly from the provider and that differences in quality, depth and currency could exist.

Record Display
Content Providers expressed concern over not being given sufficient credit for the records they provide to Discovery Services. We, therefore, recommend that Discovery Services develop the ability to exclude records from merged records that combine metadata from multiple providers and groups of records that reflect the same item such that records can stand alone if requested by the Content Provider. Similarly, we recommend that Discovery Services display the source provider of the record and logo if requested and a link back to the source provider’s platform if supplied by the Content Provider.

Ranking Algorithm Disclosure
Discovery Service Providers should explain the fundamentals of how metadata is generally utilized within the relevance algorithm (mapping metadata to indices, weighting of indices, etc.) and how it enhances discoverability. This recommendation came from the desire of Content Providers to better understand how the Discovery Services are using the various metadata elements they provide in their records. We also believe it will help Libraries to improve their knowledge of how their Discovery Service works.

Use of Content Provider Metadata
If Content Providers are responsible for providing metadata to Discovery Services, the corollary would seem to be that Discovery Services should be responsible for utilizing the metadata provided. This section recommends that Discovery Services utilize the core metadata and underlying full text/original content for the complete offerings provided by the Content Provider.

Best Practices for Libraries
While it may not seem obvious that Libraries should have responsibilities in this ecosystem since they are the customers, Discovery Services cannot work optimally unless Libraries also do their part. This
new section outline tasks for system maintenance, advocacy with Content Providers and vendors, training and communication and includes a separate conformance checklist for Library stakeholders.

**Out of Scope**
Another significant change was the removal of two areas as being out of scope, A&I databases and fair linking, which is a backwards way of saying that they are now in-scope.

The most recent recommended practice has added several provisions to ensure the business interests of A&I databases are upheld, and we therefore believe that there is no longer a need to single A&I databases out as a type of Content Providers with special considerations that make participation in discovery difficult.

Regarding fair linking, it was felt that with the current trend toward direct links over URLs generated by link resolvers that link resolvers could cease to be supported, which would cause Libraries to lose control over linking preferences. We, therefore, decided it was worthwhile to recommend that Content Providers continue to be mindful to supply the necessary metadata required to support OpenURL linking.

**Collaborative Discussion**
We expanded our education mandate to include offering opportunities to learn the fundamentals of how Discovery platforms work. This comes in addition to our existing charge to provide educational opportunities around the adoption of the Recommended Practice.

We hope our “Cliff Notes” simplify the review process. Please see the full RP revision at the top of the NISO ODI website and feel free to use the comment form to reach out with any questions or concerns. Happy reading and we look forward to seeing your comments!

Thank you! – The Open Discovery Initiative Standing Committee

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