



PROMOTING TRANSPARENCY  
IN DISCOVERY

# **What You Can Do to Help Promote Content Discovery and Why**

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NISO ODI Standing Committee



# Teresa Hazen



- Department Head, Collection Services, University of Arizona 2012 to current
- Joined ODI Standing Committee in 2017
- [hazent@arizona.edu](mailto:hazent@arizona.edu)



# Julie Zhu



- Senior Manager, Discovery Partners, IEEE
- KBART Standing Committee 2010 -
- ODI Standing Committee 2014 -

Work with IEEE internal teams, Discovery Partners, Libraries and the Scholarly Community to make the IEEE content more discoverable, linkable and accessible from all discovery channels.





# Outline

1. Overview of the Open Discovery Initiative (10 - T)
2. Roles for Content Providers and Discovery Service Providers (15 - J)
3. Roles for Libraries (15-20 - T)
4. Resources (10 - J)
5. Q&A (5)





# What is the Open Discovery Initiative?



A technical recommendation for data exchange including data formats, method of delivery, usage reporting, frequency of updates and rights of use



A way for libraries to assess content providers' participation in discovery services



A model by which content providers work with discovery service vendors via fair and unbiased indexing and linking



A way to disclose and assess open discovery conformance for content providers, discovery providers, and libraries

# Why ODI?



Simplifies the process of data exchange between participating discovery vendors and content providers



Ensures participating discovery vendors are following fair and unbiased indexing and linking practices



Mitigates technical and legal issues that might hinder broader participation by content providers or potential discovery service creators



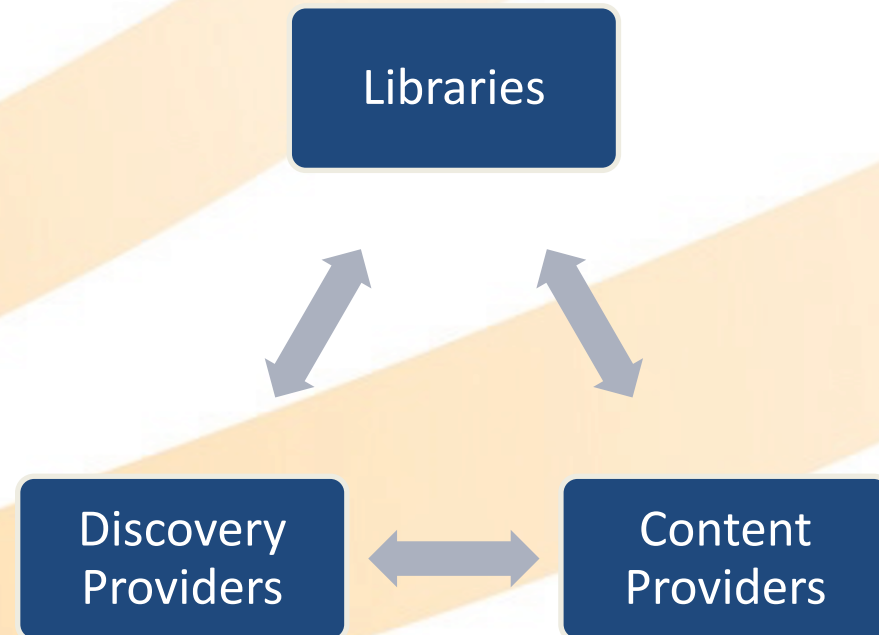
Allows libraries to understand how their licensed content is included in discovery systems

# Roles within ODI

## 3 Partners

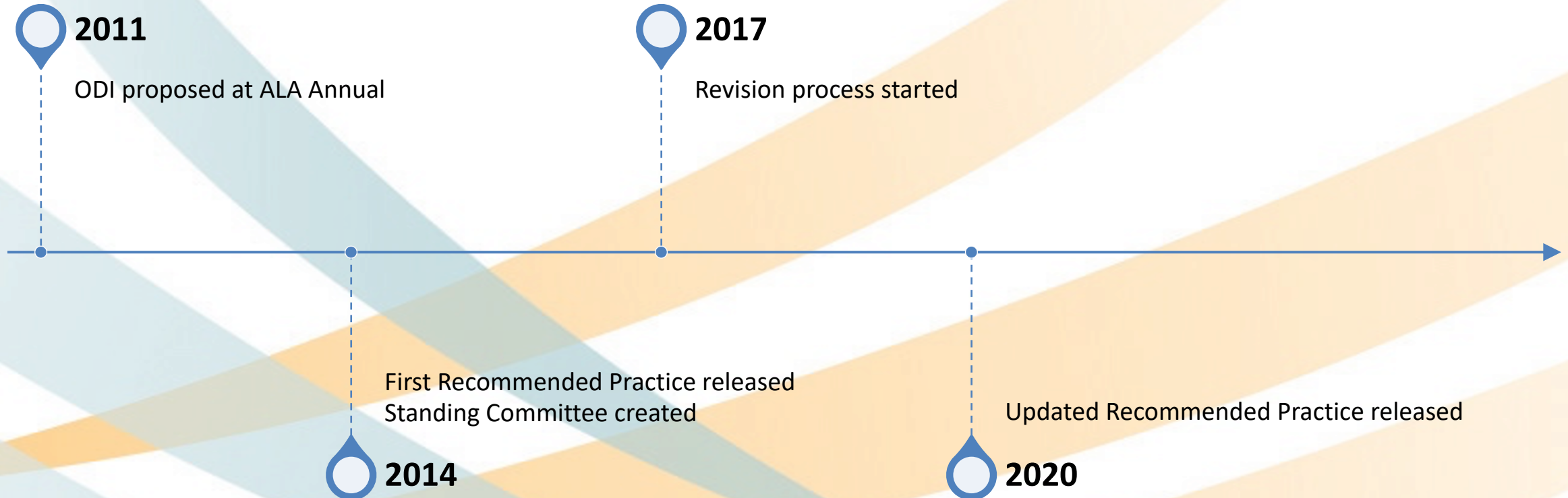
- **Libraries/Users.** Finding relevant content is simpler when it's all in one platform. ODI makes it easier to understand which resources are included in discovery services.
- **Content Providers.** Participation in discovery services makes content more valuable and discoverable, increasing usage and decreasing the likelihood of cancellations.
- **Discovery Providers.** Participation in ODI increases transparency, improving customer satisfaction and retention.

## We Are all In this Together





# History of the Open Discovery Initiative



# 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** for content providers work and discovery service vendors to work together



Define models for “**fair**” **linking** from discovery services to publishers’ content



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



# NISO RP-19-2020, Open Discovery Initiative: Promoting Transparency in Discovery



Read the Recommended Practice:

<http://www.niso.org/publications/rp-19-2020-odi>





# ODI Committee Roster

## Co-chairs

[Laura Morse](#)

*Director, Library Systems & Support, Harvard University*

[Rachel Kessler](#)

*Product Manager, ProQuest*

## Members

[Scott Bernier](#)

*Senior Vice President, Marketing, EBSCO Information Services*

[Marshall Breeding](#)

*Consultant; Creator and Editor, Library Technology Guides*

[Noah Brubaker](#)

*Private Academic Library Network of Indiana (PALNI)*

[Teresa Hazen](#)

*Dept Head. Delivery, Description, & Acquisitions, University of Arizona Libraries*

[Jay Holloway](#)

*Product Manager, OCLC*

[Geoffrey Morse](#)

*Interim Head of Research Services, Northwestern University Libraries*

[Bobbi Patham](#)

*Product Manager, SpringerNature*

[Maria Stanton](#)

*Director of Production, Atla*

[Ken Varnum](#)

*Senior Program Manager for Discovery, Delivery, and Library Analytics, University of Michigan Library*

[Lucy Walton](#)

*Scholarly Publishing Consultant, Western Sydney University*

[Julie Zhu](#)

*Senior Manager, Discovery Partners, IEEE*

# Key Updates with 2020 Version



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**Fair Linking** (3.2.3, 3.3.2): Recommend metadata for OpenURLs and provision of non-proprietary direct links



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**Usage Statistics** (3.3.4) Report usage in line with current COUNTER standard, which includes discovery usage reports



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**Open Access** (3.3.5): Parties should use “free to read” metadata



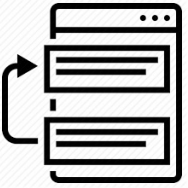
# Key Updates with 2020 Version

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**Record Display (3.3.8):** CPs can request not to merge their records & display credit for their metadata in DSP record

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**Ranking Algorithm Disclosure (3.3.9):** DSPs should explain the general fundamentals of how metadata is used

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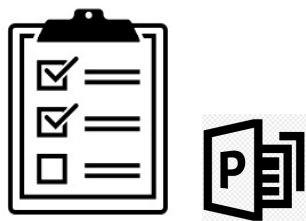


**Best Practices for Libraries (3.4): NEW** Highlights items libraries should conform with, making them equal partners





# ODI Conformance Statements



## Content Provider

1. Metadata quality
2. Fair linking
3. Open access



## Discovery Provider

1. Transparency
2. Fair linking
3. Open access
4. Metrics



## Library

1. Configuration
2. Working w/ Vendors
3. Training
4. Communication



# Content Provider Role



**Metadata Quality:** Foster 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



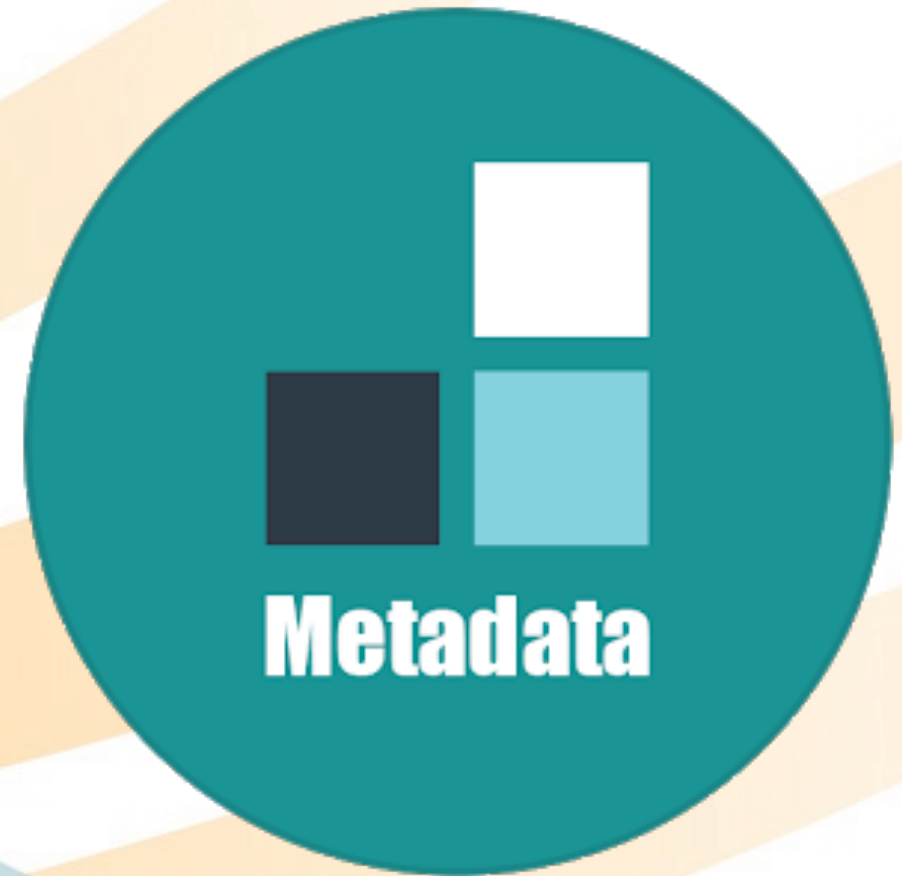
# Content Provider Role



## 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 from cultured human primordial germ cells	The evolution of cooperative signal comprehension in the domestic dog ( <i>Canis familiaris</i> )	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
			VIAF ID 15873	VIAF ID 195226	



- Publicly disclose 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

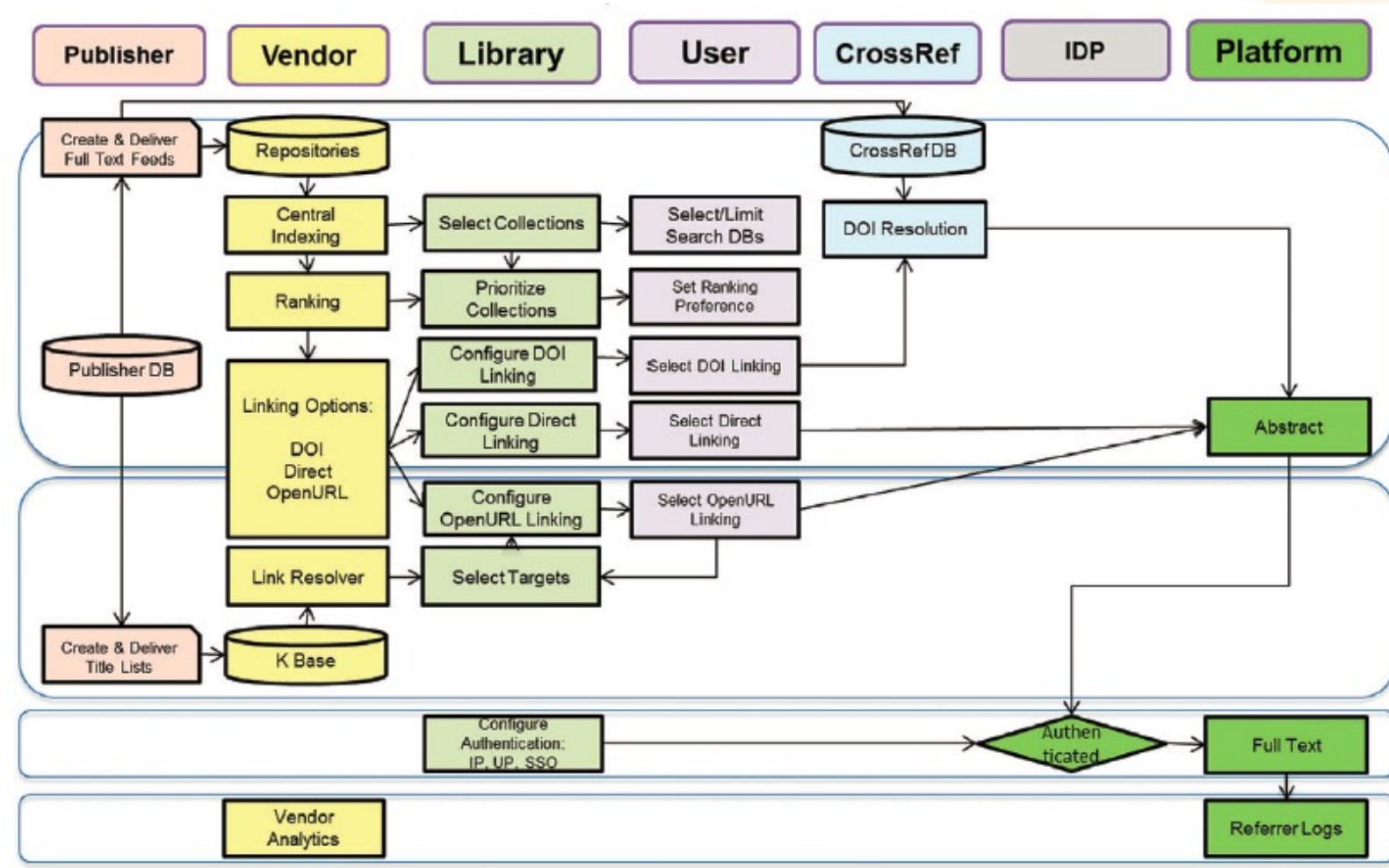
## Open Access

- 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 Pipelines



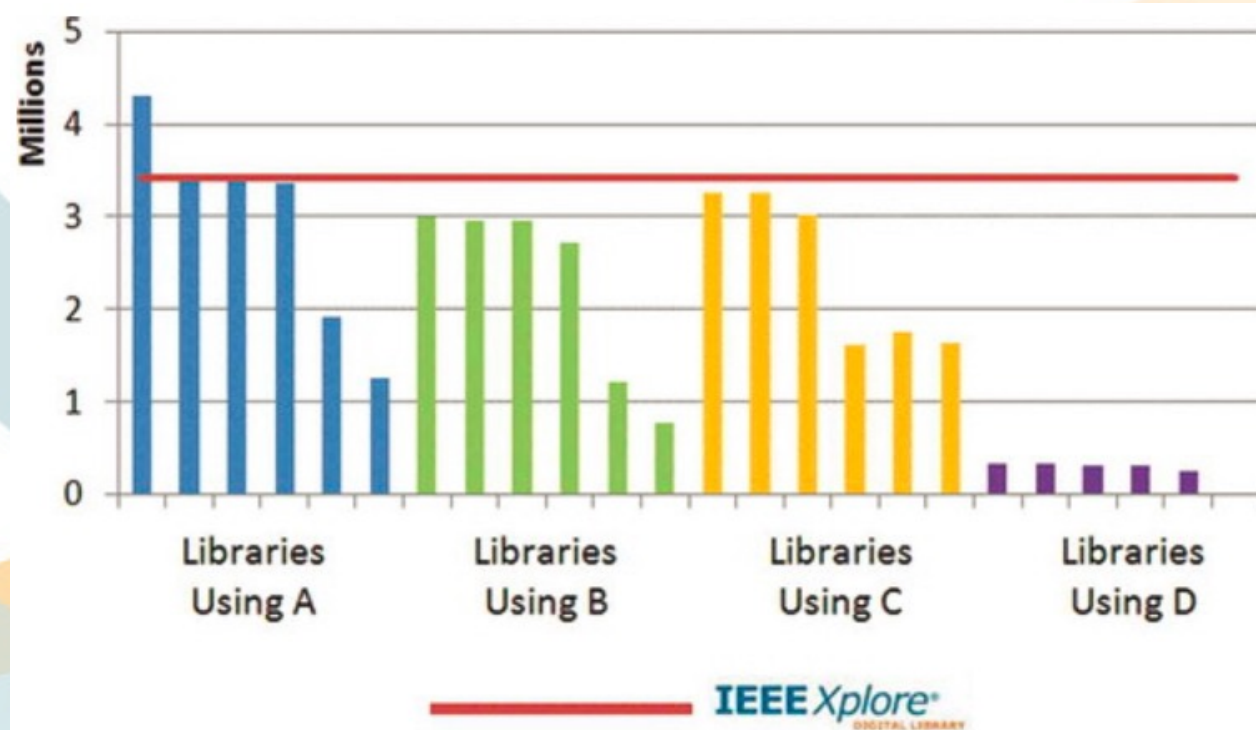
Zhu, J. "Should Publishers Invest in Library Discovery Technologies and What Can They Do?"  
*Learned Publishing* 30.1 (2017): 71-80. <http://onlinelibrary.wiley.com/doi/10.1002/leap.1079/full>





# Content Gaps in Library Discovery Tools

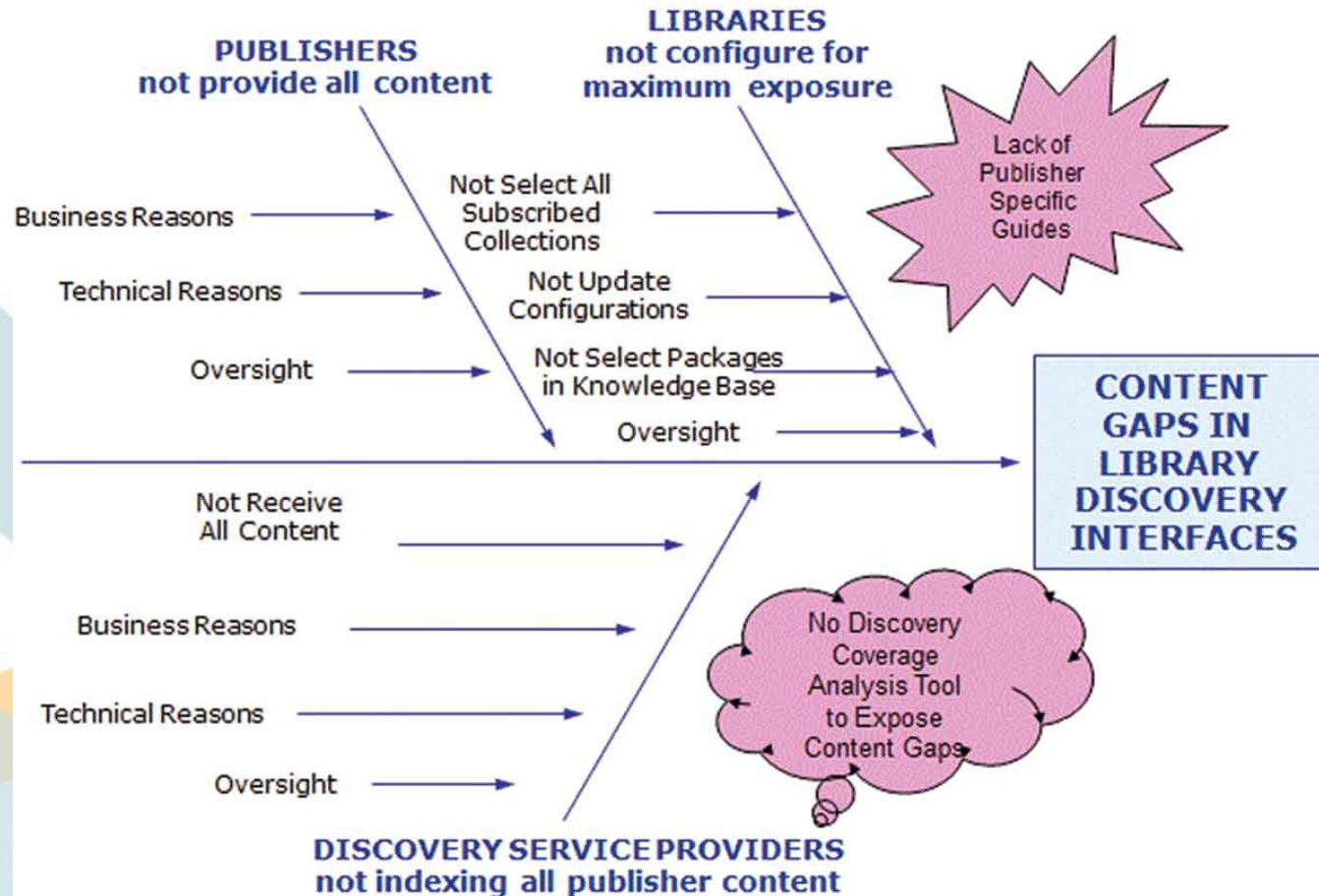
IEEE Content with FT Links in 24 Library Discovery Service Tools  
September 2015



Zhu, J. and J. Kelley. "Collaborating to Reduce Content Gaps in Discovery: What Publishers, Discovery Service Providers, and Libraries Can Do to Close the Gaps." *Science & Technology Libraries* 34.4 (2015): 315-328.

<http://www.tandfonline.com/doi/full/10.1080/0194262X.2015.1102677>

# Content Gaps in Library Discovery Tools



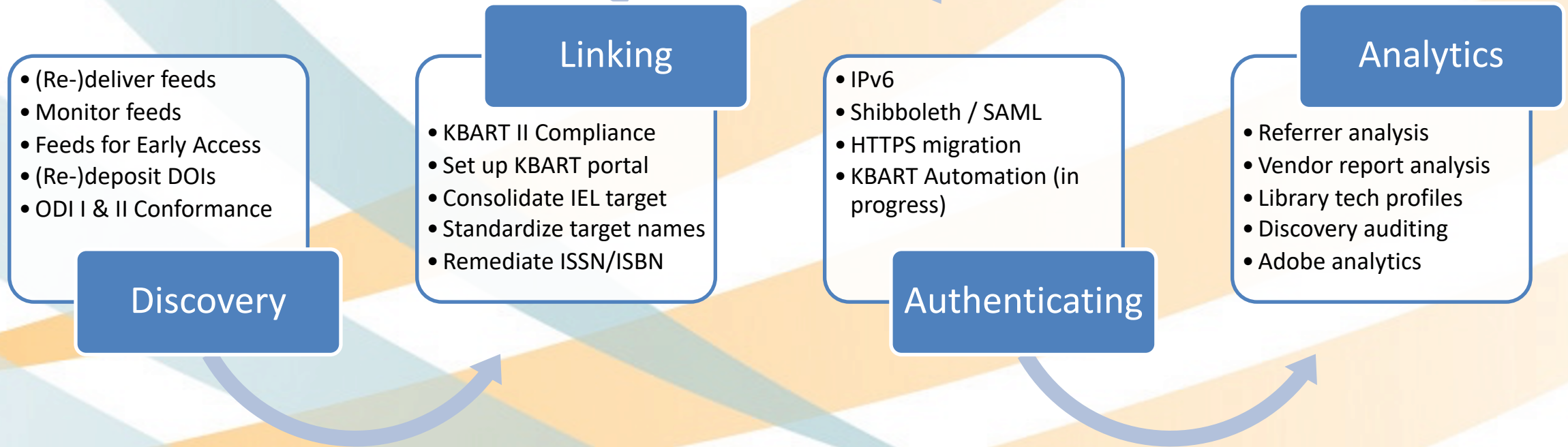
- Zhu, J. and J. Kelley. "Collaborating to Reduce Content Gaps in Discovery: What Publishers, Discovery Service Providers, and Libraries Can Do to Close the Gaps." *Science & Technology Libraries* 34.4 (2015): 315-328.  
<http://www.tandfonline.com/doi/full/10.1080/0194262X.2015.1102677>

# Improve Metadata Quality and Flows

*Internal Projects for Various Content Types*



**KBART  
Automation**

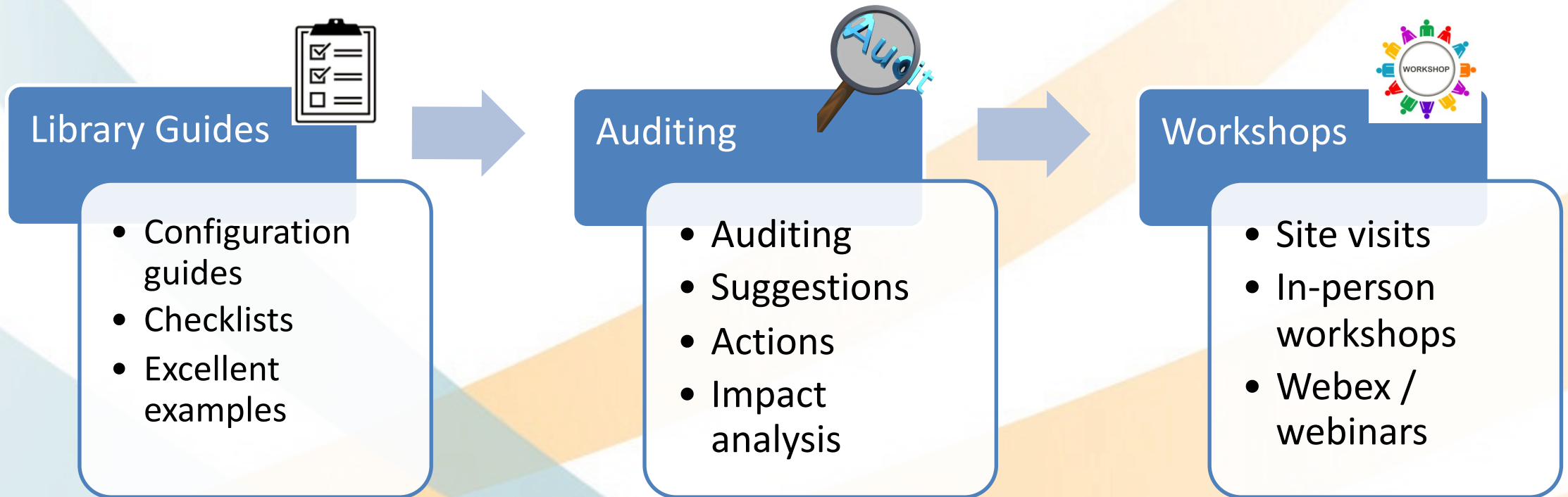




# Collaborate with Library Service Providers

Vendor	Visits	Discovery	Linking	Visibility	Authenticate	Analytics
<b>EBSCO</b>	Jan 2015	EDSEEE in EDS (2017-03)	Direct and FTF Links	IEEE Xplore App		Discovery Usages (2016-03)
<b>OCLC</b>	Sep 2016	IEEE Pubs & eBook DBs (2016-05)	Set up KB targets		HTTPS migration (2018-04)	Monthly Index & KB Reports (2017-04)
<b>Proquest</b>	Jul 2015, Mar 2018	Fill in content (2017)	Consolidate IEL Target (2015-07)	Database Recommender		Discovery Coverage Tool (2017)
<b>Proquest / Ex Libris</b>		Fill in content (2015, 2017)	Alma Provider Zone (2019-Present)			
<b>Google Scholar</b>	Jan 2017, May 2017	Re-crawling (2017-02) Meta Tags (ongoing)	Subscriber Link (2018-Q3)	Lookup Link (2018-04)	CASA (2020) Universal CASA (2020)	CASA Tokens Report

# Help Libraries for Better Content Discovery



<https://ieeexplore.ieee.org/kbart>  
<https://ieeexplore.ieee.org/discovery>

<https://ieeexplore.ieee.org/openurl>  
<https://ieeexplore.ieee.org/marc>



# Content Provider ODI Conformance Statement - IEEE

Content providers are encouraged to take specific measures to assert their conformance with NISO RP-19-2020, the recommended practices of NISO's [Open Discovery Initiative](#). These measures are voluntarily made by each organization, in an effort to increase transparency and communications around pre-indexed or “web-scale” library discovery services. The ODI Conformance Checklist below was created to enable standardized methods for content providers to assert their ODI conformance to libraries, discovery services, and other industry stakeholders.

Market product(s): [IEEE Xplore Publications](#)

Organization name: [IEEE](#) Date: [March 17, 2021](#)

Contact information: [Julie Zhu, zhu.j@ieee.org](#)

Y/P/N	Recommendation	Reference	Comment
P	Open Access Designation	3.2.1.2	Our articles have an Open Access Indicator. We are working on implementing tags compliant with NISO's Access License and Indicators.



# Content Provider ODI Conformance Statement - IEEE

Y/P/N	Recommendation	Reference
Y	Content Provider makes <u>core metadata</u> and underlying <u>full-text/original</u> content for complete offerings available to Discovery Service Providers.	3.2.1.1 (1)
Y	Content Provider makes the core set of metadata elements and content item (full text, transcript, etc.) for each item submitted for indexing available to Discovery Service Providers.	3.2.1.1 (2)
Y	Title	3.2.1.2
Y	Authors	3.2.1.2
Y	Author Identifier	3.2.1.2
Y	Publisher Name	3.2.1.2
Y	Volume	3.2.1.2
Y	Issue	3.2.1.2
Y	Page(s)	3.2.1.2
Y	Date/Date Range	3.2.1.2
Y	Item Identifier	3.2.1.2
Y	Component of Title	3.2.1.2
Y	Component of Title Identifier	3.2.1.2
Y	Item URL	3.2.1.2

Y	Content Type	3.2.1.2
Y	Content Format	3.2.1.2
Y	Language	3.2.1.2
Y	Indexing Data	3.2.1.2
Y	Full Text/Transcript	3.2.1.2
Y	Abstract/Description	3.2.1.2
Y	Content Provider provides libraries, on request, with a statement of participation in the discovery services, including disclosure of <u>coverage depth</u> and content depth.	3.2.2
Y	Content Provider's agreements with Discovery Service Providers do not include <u>NDA's</u> .	3.2.3
Y	The transfer of Content Provider's data to Discovery Service Providers makes use of existing standards where applicable and uses one of the metadata encoding schemes listed in 3.3.3.	3.2.4
Y	Content Provider provides data to support <u>OpenURL</u> resolution ( <u>ANSI/NISO Z39.88-2004 (R2010)</u> <u>The OpenURL Framework for Context-Sensitive Services</u> ). The resulting OpenURL should link to the item itself, or as close to it as possible in the content provider's site structure.	3.2.5
Y	Content Provider provides clear channels for <u>reporting discovery</u> related support issues.	3.2.6



# Discovery Provider Role



**Transparency** of what  
is included in  
Discovery System

- Collection level
- Title level



**Fair linking**



**Open Access**



**Metrics**



# Discovery Provider Role



## Transparency

- Collection level metadata
- Title level metadata





# Discovery Provider Role



## Fair linking

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



# Discovery Provider Role



## Open Access

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



# 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 Service Provider ODI Conformance Statement



## ODI Conformance Checklist: Discovery Service Provider

Discovery service providers are encouraged to take specific measures to assert their conformance with NISO RP-19-2020, the recommended practices of NISO's [Open Discovery Initiative](#). These measures are voluntarily made by each organization, in an effort to increase transparency and communications around pre-indexed or “web-scale” library discovery services. The ODI Conformance Checklist below was created to enable standardized methods for discovery service providers to assert their ODI conformance to libraries, content providers, and other industry stakeholders.

Market product(s): \_\_\_\_\_  
Organization name: \_\_\_\_\_ Date: \_\_\_\_\_  
Contact information: \_\_\_\_\_

Y/P/N	Recommendation	Reference	Comment
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- Template <http://www.niso.org/standards-committees/odi/conformance>
- OCLC Example <https://www.oclc.org/en/worldcat-discovery/resources/open-discovery-initiative.html>



# Provide collection level content listing for library customers

Y/N/P	Recommendation	Reference	Comment
	Discovery Service provides collection level content listing for library customers.	3.3.1.1	
Y	Provider	3.3.1.1	Detailed list of central index collections available at <a href="https://oclc.org/discovery/index">oclc.org/discovery/index</a>
Y	Market product	3.3.1.1	Detailed list of central index collections available at <a href="https://oclc.org/discovery/index">oclc.org/discovery/index</a>
Y	<u>Titles in KB</u>	3.3.1.1	<a href="#">View list of WorldCat knowledge base collections</a>
Y	<u>Titles in Central Index</u>	3.3.1.1	Total number of records display on <a href="#">WorldCat Discovery website</a> .
N	Number of unique records in Central Index	3.3.1.1	Total number of records displays on <a href="#">WorldCat Discovery website</a> .
Y	Percent of records full-text searchable in Central Index	3.3.1.1	Will provide upon request submitted to <a href="mailto:support@oclc.org">support@oclc.org</a> .
P	Percent of records abstract searchable in Central Index	3.3.1.1	Available at the collection level via request submitted to <a href="mailto:support@oclc.org">support@oclc.org</a> .
P	Percent of records subject searchable in Central Index	3.3.1.1	Available at the collection level via request submitted to <a href="mailto:support@oclc.org">support@oclc.org</a> .
Y	Percent of articles that are free to read	3.3.1.1	Service surfaces articles when needed metadata is available. Percentages will be provided upon request submitted to <a href="mailto:support@oclc.org">support@oclc.org</a> . <a href="#">View list of 100% free to read collections</a> .



# Provide title-level content listing for library customers

	Discovery Service provides title-level content listing for library customers.	3.3.1.2	
Y	Title	3.3.1.2	A list of collections in the WorldCat knowledge base is available on the <a href="#">OCLC website</a> . Consult content providers title-level details about individual collections.
Y	Standard identifier	3.3.1.2	A list of collections in the WorldCat knowledge base is available on the <a href="#">OCLC website</a> . Consult content providers title-level details about individual collections.
Y	Content format	3.3.1.2	A list of collections in the WorldCat knowledge base is available on the <a href="#">OCLC website</a> . Consult content providers title-level details about individual collections.
Y	Content type	3.3.1.2	A list of collections in the WorldCat knowledge base is available on the <a href="#">OCLC website</a> . Consult content providers title-level details about individual collections.
Y	Dates of coverage or date of publication	3.3.1.2	A list of collections in the WorldCat knowledge base is available on the <a href="#">OCLC website</a> . Consult content providers title-level details about individual collections.
Y	Number of records in Central Index	3.3.1.2	





# Provide title-level content listing for library customers

Y	Dates of coverage or date of publication	3.3.1.2	A list of collections in the WorldCat knowledge base is available on the <a href="#">OCLC website</a> . Consult content providers title-level details about individual collections.
Y	Number of records in Central Index	3.3.1.2	
Y	Percent of records full-text searchable in Central Index	3.3.1.2	Available upon request submitted to <a href="mailto:support@oclc.org">support@oclc.org</a> .
Y	Percent of records abstract searchable in Central Index	3.3.1.2	Available upon request submitted to <a href="mailto:support@oclc.org">support@oclc.org</a> .
Y	Percent of records subject searchable in Central Index	3.3.1.2	Available upon request submitted to <a href="mailto:support@oclc.org">support@oclc.org</a> .
N	Percent of articles that are free to read	3.3.1.2	<a href="#">View list of 100% free-to-read collections.</a>
N	Date of last report update	3.3.1.2	



# Distribution of metadata elements

	Distribution of metadata elements	3.3.1.3	
Y	Provide data in downloadable form	3.3.1.3 (1)	
Y	Provide data in tab-delimited text files	3.3.1.3 (2)	
N	Use ProviderName_YYYY-MM-DD.csv naming convention	3.3.1.3 (3)	Naming convention is managed by content providers.
Y	Provide monthly reports	3.3.1.3 (4)	
Y	Secure access to the reports	3.3.1.3 (5)	



# Linking & Transparency

Y	Discovery Service does not discriminate among <u>Content Providers</u> contributing to the service.	3.3.2 (1)	
Y	Mechanisms are offered to enable libraries to establish preferences regarding which platforms to present to users as link targets, and in what order or priority.	3.3.2 (2)	
Y	Discovery Service confirms <u>non-bias</u> with regard to content indexed and results presented to the user. A statement in this regard is published annually.	3.3.2 (3)	
Y	Discovery Service uses an algorithm that is <u>non-preferential</u> with regard to the Content Provider for generating result sets, relevance rankings, and link order.	3.3.2 (4)	
P	Link presentation associated with a given result is configurable by libraries.	3.3.2 (5)	
Y	Discovery Service supplies content providers and libraries with information when material changes are made to the discovery service that could impact the result set or relevance rankings or link order of results.	3.3.2 (6)	





# File formats and methods of transfer

Y	Provides description of capabilities, limitations, and preferences regarding how content providers should transfer data to them for the most effective indexing by the discovery service.	3.3.3 (1)	
Y	Communicates to content providers when format, schema, or transport mechanisms will have an impact on features or performance of the discovery service.	3.3.3 (2)	
Y	Uses mutually agreed-upon robust metadata encoding schemas.	3.3.3 (3)	
Y	Uses mutually agreed-upon method and schedule for delivery of metadata.	3.3.3 (4)	



# Provide usage reports

Y	Discovery Service provides COUNTER-compliant usage reports on schedule to all content providers	3.3.4.1.1	OCLC supplies data to Google Analytics for access via individual library Google Analytics subscriptions.
Y	Discovery Services includes a referrer URL identifying the discovery service when linking to content platforms or link resolvers.	3.3.4.1.2	OCLC supplies data to Google Analytics for access via individual library Google Analytics subscriptions.
Y	Discovery Service provides usage metrics to libraries.	3.3.4.2	
Y	Report on total number of searches per month.	3.3.4.2 (1)	
Y	Report on total number of unique visitors per month.	3.3.4.2 (2)	
Y	Report on total number of click-throughs per month.	3.3.4.2 (3)	
Y	Report on top 500 search queries for the last period.	3.3.4.2 (4)	OCLC supplies data to Google Analytics for access via individual library Google Analytics subscriptions.
Y	Report on top 100 referring URLs to the Discovery Service for the last period.	3.3.4.2 (5)	OCLC supplies data to Google Analytics for access via individual library Google Analytics subscriptions.



# Free to read, license, customized configurations

P	Discovery Service displays the <u>"free to read" indicator</u> and <u>provides the license</u> reference element for all content to which it has been applied.	3.3.5	<p>This metadata is not currently provided by content providers in the NISO Free to Read/Free to Use Format.</p> <p>Where OCLC can identify OA collections, we identify it through OA collections, links, and filters.</p>
Y	Discovery Service provides mechanism to only allow certain databases to be searchable by authenticated users.	3.3.6 (1)	
Y	Discovery Service takes measures to ensure that certain databases are only activated by mutual subscribers if desired by the content provider.	3.3.6 (2)	
N/A	Discovery Service alternative coverage lists clearly indicate the metadata fields indexed are alternatives to specialized data, and note potential differences in quality, depth, and currency.	3.3.7	Service surfaces data provided by content providers. OCLC does not publish alternative coverage lists.
Y	Discovery Service should be able to exclude records from merged or grouped records if desired by the content provider.	3.3.8 (1)	Duplicate articles across providers are clustered together. Institution can choose which databases are included in the cluster through database selections and can choose to turn clustering off.
P	Discovery Service should be able to display the source provider of the record and their logo.	3.3.8 (2)	Item details descriptions display source provider.
Y	Records in Discovery Service should include a link back to the source provider's platform if supplied by the provider.	3.3.8 (3)	





# Documentation, reporting problems

Y	Discovery Service makes available <u>documentation</u> that describes how metadata is generally utilized within the relevance algorithm and how it enhances discoverability.	3.3.9	
Y	Discovery Service utilizes the core metadata and underlying full-text/original content for <u>complete offerings</u> provided by content providers.	3.3.10	
Y	Discovery Service Provider provides clear <u>channels for reporting</u> support issues	3.3.11	



# Librarian Role in ODI

- Be a partner with the other two groups
- Be informed
- Read revised RP
- Download the conformance checklist template for your organization and complete it:
- [https://groups.niso.org/apps/group\\_public/download.php/24201/ODI%20Conformance%20Checklist%20Template\\_Library\\_2020.docx](https://groups.niso.org/apps/group_public/download.php/24201/ODI%20Conformance%20Checklist%20Template_Library_2020.docx)

# Librarian Conformance Statement



## ODI Conformance Checklist: Library

Libraries are encouraged to take specific measures to assert their conformance with NISO RP-19-2020, the recommended practices of NISO's [Open Discovery Initiative](#). These measures are voluntarily made by each organization, in an effort to increase transparency and communications around pre-indexed or "web-scale" library discovery services. The ODI Conformance Checklist below was created to enable standardized methods for libraries to assert their ODI conformance to content providers, discovery services, and other industry stakeholders.

Organization name: _____ Date: _____			
Contact information: _____			
Y/P/N	Recommendation	Reference	Comment
	Library designates individuals to be responsible for configuring Discovery Service, link resolver, proxy, and other discovery-related tools for subscribed content from Content Providers. Designated point persons should work or coordinate with each other.	3.4.1.1 (1)	
	Library enables linking, ranking, and authentication options available in the Discovery Service Tool for subscribed content from Content Providers, and seeks clarification if needed.	3.4.1.1 (2)	

- Download the conformance checklist template for your organization and complete it:
- [https://groups.niso.org/apps/group\\_public/download.php/24201/ODI%20Conformance%20Checklist%20Template\\_Library\\_2020.docx](https://groups.niso.org/apps/group_public/download.php/24201/ODI%20Conformance%20Checklist%20Template_Library_2020.docx)
- **Some tips:**
- Perfection is not the goal
- This is for you to assess where you are and what you can improve
- A good opportunity to review configurations, workflows, processes, and modes of communicating across your organization



# Library Conformance Statement

## Some General Categories



GENERAL



COLLABORATION



CONFIGURATION



DOCUMENTATION



LONG TERM  
PLANNING



MAINTENANCE

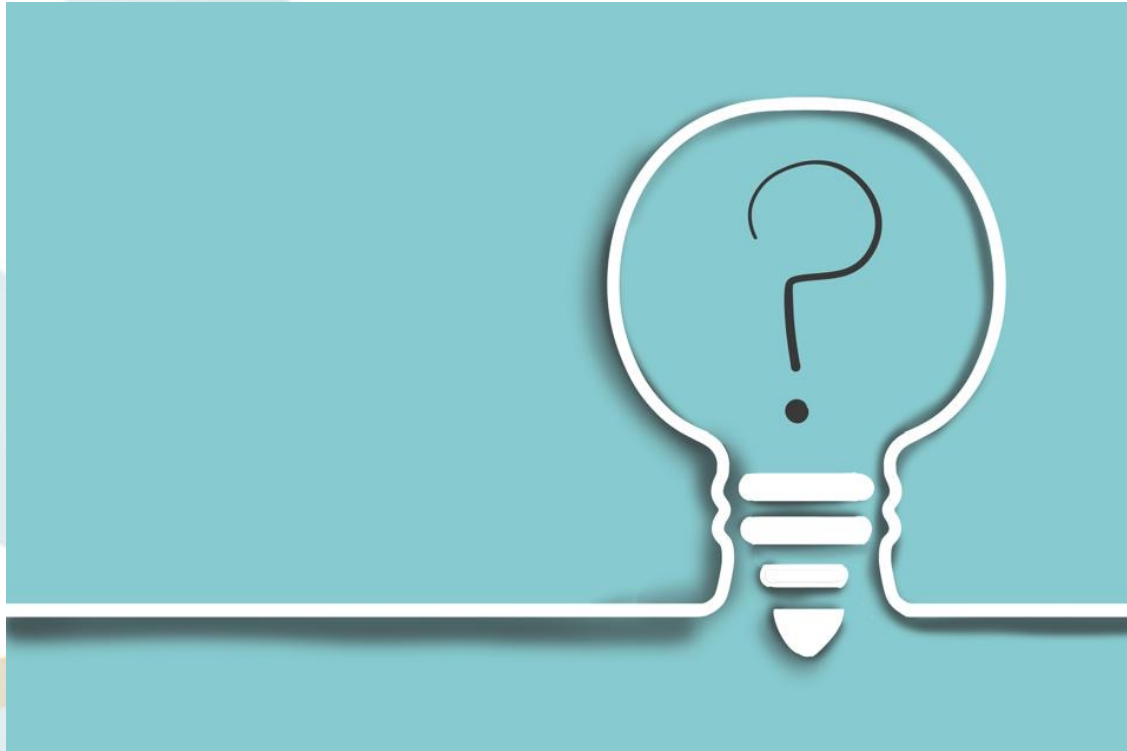


TRAINING



VENDOR  
COMMUNICATION

# General



Who does this work in your library?

*Systems librarian, electronic resources librarian, experienced staff*

If done by multiple staff members, do they have processes in place for cross team communication?

*Do you meet as a cross-functional team?*

# General



## ODI Conformance Checklist: Library

Libraries are encouraged to take specific measures to assert their conformance with NISO RP-19-2020, the recommended practices of NISO's [Open Discovery Initiative](#). These measures are voluntarily made by each organization, in an effort to increase transparency and communications around pre-indexed or “web-scale” library discovery services. The ODI Conformance Checklist below was created to enable standardized methods for libraries to assert their ODI conformance to content providers, discovery services, and other industry stakeholders.

+ Organization name: <u>The University of Arizona.</u> Date: <u>May ?, 2021</u> Contact information: <u>Teresa Hazen, hazent@arizona.edu</u>			
Y/P/N	Recommendation	Reference	Comment
Y	Library designates individuals to be responsible for configuring Discovery Service, link resolver, proxy, and other discovery-related tools for subscribed content from Content Providers. Designated point persons should work or coordinate with each other.	3.4.1.1 (1)	Daricus & Lee- discovery, and peripherally discovery related tools. Laurie- proxy, link resolver, subscribed content <u>TeSS-dev-</u> proxy and discovery related tools for subscribed content (IP issues)

Arizona's working conformance statement document



# Collaboration

- What groups focus on your discovery tool?

*Are you located in different departments?*

- Who should be monitoring or participating in each?

*Do you know who is monitoring what?*

- Are there websites to monitor?

*Do you duplicate effort or have gaps?*



# Collaboration

Y	Library staff join the online communities (listservs and forums) for the Discovery Service Providers, engage in dialogue, offer ideas and suggestions, and share innovative approaches created or implemented.	3.4.3.1 (4)	Laurie- very active in online communities. Lee, Mona, Daricus- active as well.
Y	Library staff on licensing, electronic resources, systems and front service regularly meet to discuss configuring Discovery Service, link resolver, proxy server, and other discovery-related tools for subscribed content.	3.4.3.2	Weekly e-resources meetings to discuss  Primo Group  LSP Oversight Group does some of this.  Could do a better job of discussing Primo Group decisions.  We don't discuss link resolver or proxy server configurations unless there is a problem and that is between e-resources team and library IT.

- What groups focus on your discovery tool?

*Are you located in different departments?*

- Who should be monitoring or participating in each?

*Do you know who is monitoring what?*

- Are there websites to monitor?

*Do you duplicate effort or have gaps?*

# Configuration

## Configuration

- Is it clear who in your organization is responsible for configuration of your discovery system and related tools?

*Is it in their position description? Job title?*

- Is there formalized communication, collaboration, and coordination with those responsible?

*Do you have an oversight group?*





# Configuration



Y	Library enables linking, ranking, and authentication options available in the Discovery Service Tool for subscribed content from Content Providers, and seeks clarification if needed.	3.4.1.1 (2)	
Y	Library documents configuration decisions and the reasons behind these decisions.	3.4.1.1 (3)	
Y	Library regularly evaluates and updates its configurations of Discovery Service configurations.	3.4.1.1 (4)	

# Documentation



- Is someone responsible for updating documentation?

*Is it in their job description? Is this regularly checked for updates?*

- Is it easy to find?

*Is it in a shared space that everyone has access to and can easily navigate?*

- Is it in a secure place?

*Is it in the cloud or on someone's desktop?*

# Long Term Planning

- When is discovery use lower on your campus, so you can schedule updates with minimal impact on users?

*Do you have that flexibility? Do you to ask your discovery provider for more flexibility?*

- Who is responsible for monitoring update announcements from the vendor and making decisions?

*Do you have a designated person at your institution?*





# Maintenance

- Do you regularly evaluate and update existing configuration settings of your discovery services and tools?

*Is this planned and organized?*

- Do you regularly check content and discovery providers' configuration guides, conformance statements, and official communications regarding changes?

*Who is responsible for this?*

# Maintenance



P	Library regularly checks and evaluates <a href="#">ODI Conformance Statements</a> from Content Providers and Discovery Service Providers and <a href="#">publisher-provided configuration guides for libraries</a> .	3.4.2.2 (1)	We will do so when they are made available by providers.
Y	Library <a href="#">advocates increasing ODI conformance for Content Providers</a> and Discovery Service Providers.	3.4.2.2 (2)	
Y	Library uses the vendor-provided tools to report missing, incomplete, or incorrect database collections, first to the Discovery Service Provider, and next to the Content Provider.	3.4.2.3	We report problems to the Discovery Service Provider and to the Content Provider depending on which is facilitating access. Occasionally the same problem will be reported to both providers.

# Training

- Do you develop staff training programs for managing link resolver, proxy, discovery service, and other tools?

*Is there only one person who knows this work creating a single point of failure?*

- Do you provide regular training sessions to patrons and staff on how to use Discovery Service tool?

*Do you have brown bag sessions?*

*Do you attend other department meetings to train front line staff and liaisons?*





# Vendor Communication



- During and after implementation of your discovery service have you worked with vendors on creating detailed support agreements?

*Do you know the service level? Have you built a relationship with any discovery or content providers?*

- Are you familiar with vendor- provided tools to report missing, incorrect, and incomplete database collections?

*Are you active on support centers, idea exchanges, and enhancement voting?*

# Vendor Communication

P	Library works with vendors to create detailed agreements on what support the provider offers during and after implementation.	3.4.2.1	In our experience, most vendors do not offer this, and not all resources have customized contracts.
P	Library regularly checks and evaluates <a href="#">ODI Conformance Statements</a> from Content Providers and Discovery Service Providers and <a href="#">publisher-provided configuration guides for libraries</a> .	3.4.2.2 (1)	We have limited experience evaluating such statements and guides; we will do so when they are made available.
Y	Library advocates <a href="#">increasing ODI conformance for Content Providers</a> and Discovery Service Providers.	3.4.2.2 (2)	
Y	Library uses the vendor-provided tools to report missing, incomplete, or incorrect database collections, first to the Discovery Service Provider, and next to the Content Provider.	3.4.2.3	Generally, we report problems to the Discovery Service Provider when they are facilitating access, and to the Content Provider when they are facilitating access. We only occasionally report the same problem to both providers.

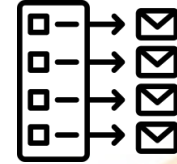


P	Library works with vendors to create detailed agreements on what support the provider offers during and after implementation.	3.4.2.1	We will work to do this when able to customize contracts. Currently, most vendors do not offer customized contracts.
P	Library regularly checks and evaluates <a href="#">ODI Conformance Statements</a> from Content Providers and Discovery Service Providers and <a href="#">publisher-provided configuration guides for libraries</a> .	3.4.2.2 (1)	We will do so when they are made available by providers.

# ODI General Resources



[ODI Recommended Practice](#)



[ODI Mailing List](#)



[Future of Library Resource Discovery](#)



[ODI Standing Committee Email](#)



[ODI Brochure](#)



[ODI Twitter](#)



[ODI Updates Newsletters](#)

<https://www.niso.org/standards-committees/odi/general-resources>





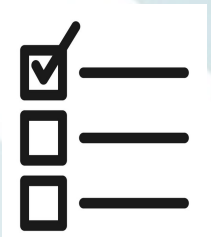
# Resources for Content Providers



[Content Provider FAQ](#)



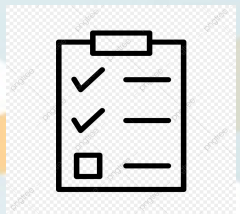
[ODI Implementation Guide for Content Providers](#)



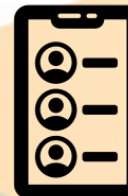
[ODI Content Provider Conformance Checklist Templates](#)



[Content Discovery Management Google Group](#)



[ODI Content Provider Completed Conformance Statements](#)



[Publisher Contacts for Content Discovery](#)

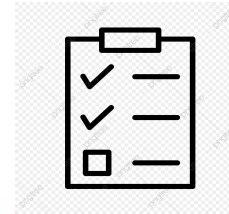
<https://www.niso.org/standards-committees/odi/resources-content-providers>



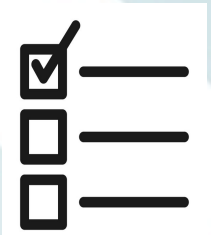
# Resources for Discovery Service Providers



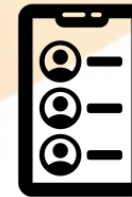
[Discovery Provider FAQ](#)



[ODI Discovery Service Provider Completed Conformance Statements](#)



[ODI Discovery Service Provider Conformance Checklist Templates](#)



[Publisher Contacts for Content Discovery](#)

<https://www.niso.org/standards-committees/odi/resources-discovery-service-providers>



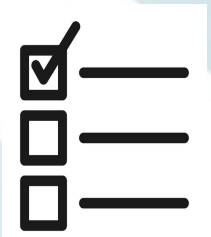
# Resources for Librarians



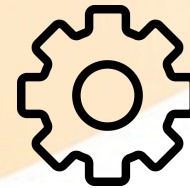
Library Conformance FAQ



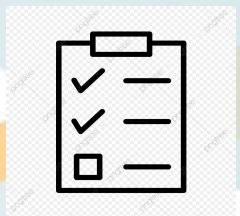
Talking Points about Transparency



Library Conformance Statement Checklist Template



Publishers Discovery Configuration Guides



Completed ODI Library Conformance Statements



ODI Library Survey Summary

<http://www.niso.org/standards-committees/odi/resources-libraries>





# Configuration Guides from Publishers

## Elsevier

<https://www.elsevier.com/solutions/sciencedirect/support/discovery-services>

**Gale** <http://www.gale.com/discovery>

**IEEE** <https://ieeexplore.ieee.org/discovery>  
<https://ieeexplore.ieee.org/openurl>

**SAGE** <https://us.sagepub.com/en-us/nam/indexing-discoverability>

## Springer Nature

<https://www.springernature.com/discovery>

**Wiley** <https://onlinelibrary.wiley.com/library-info/resources/discovery>

<https://www.niso.org/standards-committees/odi/configuring-content-providers>



# IEEE Xplore Package KBART Title Lists






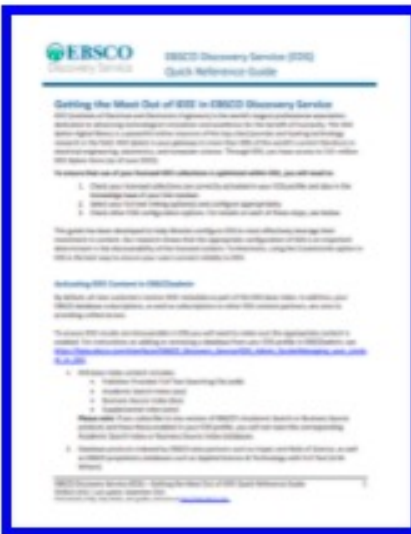




<https://ieeexplore.ieee.org/kbart>

IEEE Xplore Publications			
IEEE Xplore All Journals	Text	Excel	Info
IEEE Xplore All Conference Series	Text	Excel	Info
IEEE Xplore All Conference Proceedings	Text	Excel	Info
IEEE Xplore All Standards	Text	Excel	Info
IEEE Xplore All Books	Text	Excel	Info
IEEE Xplore All Courses	Text	Excel	Info
IEEE Journals & Conferences			
IEEE/IET Electronic Library (IEL)	Text	Excel	Info
• IEEE/IET Electronic Library (IEL) Journals	Text	Excel	Info
• IEEE/IET Electronic Library (IEL) Conference Proceedings	Text	Excel	Info
• IEEE/IET Electronic Library (IEL) Standards	Text	Excel	Info



# Discovery Tool Configuration Guides

<https://ieeexplore.ieee.org/discovery>





# IEEE Xplore EDS/Full Text Finder

## [EDS Quick Reference Guide](http://support.ebsco.com/eds/content/en_eds_ieee_quickrefguide.pdf)

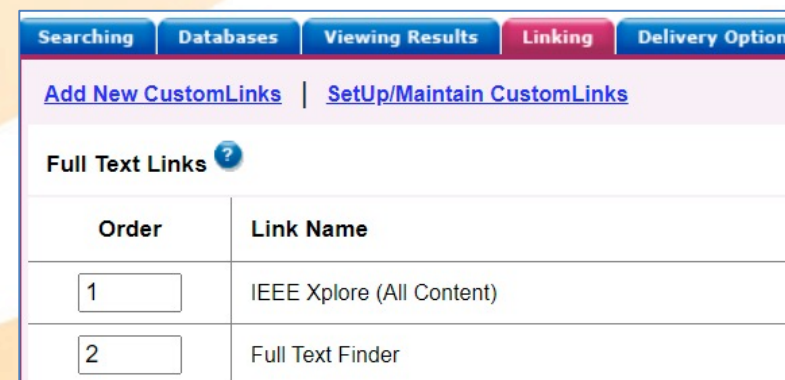
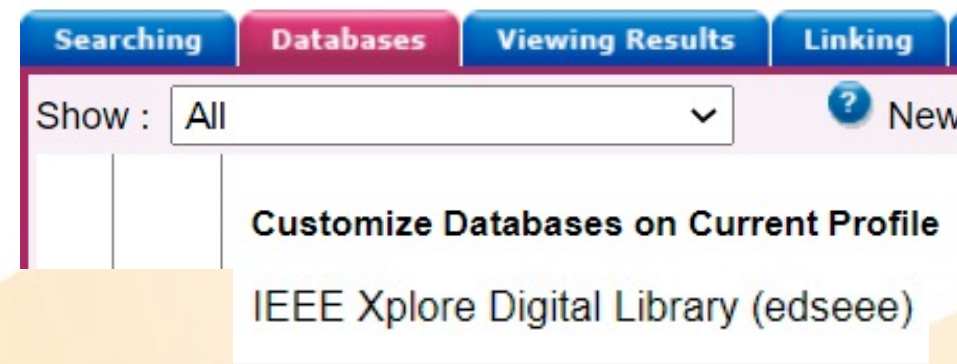
[http://support.ebsco.com/eds/content/en\\_eds\\_ieee\\_quickrefguide.pdf](http://support.ebsco.com/eds/content/en_eds_ieee_quickrefguide.pdf)

1. In EBSCOadmin Index, **select IEEE Xplore Digital Library** Partner Database
2. **Activate IEEE Xplore CustomLink (CustomLink)**
3. Activate OpenURL/Full Text Finder Link
4. Give higher ranking to IEEE Xplore CustomLink
5. Activate IEEE Xplore App

## [Full Text Finder Quick Reference Guide](http://support.ebsco.com/eds/content/en_ftf_ieee_quickrefguide.pdf)

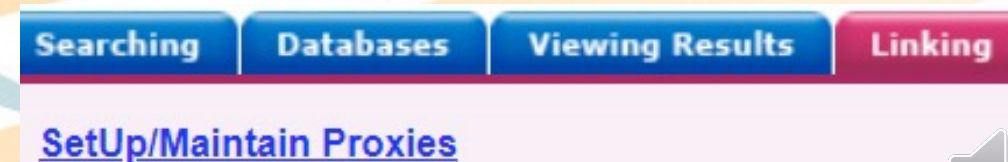
[http://support.ebsco.com/eds/content/en\\_ftf\\_ieee\\_quickrefguide.pdf](http://support.ebsco.com/eds/content/en_ftf_ieee_quickrefguide.pdf)

1. Activate subscribed IEEE packages, such as IEEE Electronic Library, IEEE-Wiley eBooks, etc.
2. Set and maintain Proxies



## Holdings Management

IEEE Electronic Library (IEL)



# IEEE Xplore Summon/360 Link Guide

<https://ieeexplore.ieee.org/Xplorehelp/downloads/discovery-services/maxdiscoverability.pdf>

In Summon Admin

1. Select IEEE Electronic Library (IEL) and/or other collections.
2. Select display in Summon, 360 Link and 360 Core
3. Activate Index-Enhanced Direct Linking (IEDL) for IEEE content
4. In Recommended Databases, increase ranking for IEEE Electronic Library
5. Make sure your proxy configuration file includes the appropriate IEEE domain(s)
6. Check configurations periodically

The screenshot shows the IEEE eLearning Library (IEL) configuration page in the ExLibris Summon Admin interface. The page is titled "IEEE eLearning Library" and "IEEE Electronic Library (IEL)". It displays various configuration options for the IEL database, including the provider (IEEE), titles (40509), status (Subscribed), and display settings (360 Core, 360 Link, Summon). The default URL is https://ieeexplore.ieee.org/.

IEEE eLearning Library	FXCWV
IEEE Electronic Library (IEL)	RIE

ExLibris a ProQuest Company

Catalog: All Titles Title Begins With

Home > Data Management > Database Details

IEEE :: IEEE Electronic Library (IEL)

Database Details

- General
- Titles (40509)
  - Books (34483)
  - Journals (6026)
  - Videos (0)

Code RIE

Last Full Update 03/09/2021

Last Partial Update 12/21/2020

Provider IEEE

Titles 40509

Status Subscribed

Summon ✓ 64% View coverage

Display In: ☒ 360 Core ☒ 360 Link ☒ Summon

Default URL <https://ieeexplore.ieee.org/>



# IEEE Xplore Primo/SFX/Alma Guide

<https://ieeexplore.ieee.org/Xplorehelp/downloads/discovery-services/primobestpractices.docx>


## IEEE Electronic Library (IEL)

**Type:** Selective package  
**Service:** Full Text  
**Full Text Linking in CDI:** Linkresolver  
**Interface name:** IEEE Xplore  
**Linking Level:** Article  
**Creation Date:** 04/15/2016 08:31:30 CDT  
**Modification Date:** 03/01/2021 24:36:38 CST

Available for CDI search activation 

**Provider coverage:** Yes  
**Search Rights in CDI:** Free  
**Full Text Rights in CDI:** Subscription (Linkresolver)

CDI Type: Full Text Collection

 Managed by IEEE Xplore  
**Collection ID:** 61386000000000120  
**MMS ID:** 995521887000041


## IEEE Xplore Wiley eBooks Library (IEEE Xplore)

**Type:** Selective package  
**Services:** Full Text (Available)  
**Interface name:** IEEE Xplore  
**Linking Level:** Book  
**Creation Date:** 06/20/2016 13:36:08 CDT  
**Modification Date:** 01/27/2021 06:51:10 CST

Available for CDI search activation 

**Active for Search in CDI:** No  
**Search Rights in CDI:** Free  
**Full Text Rights in CDI:** Subscription (Linkresolver)  
**Full Text Linking in CDI:** Linkresolver  
**CDI Type:** Full Text Collection


**Library:** Main Library

 Managed by IEEE Xplore

**Collection ID:** 61663329830002441  
**MMS ID:** 9980455357902441

## IEEE Elearning Library

**Type:** Selective package  
**Services:** Full Text (Available)  
**Interface name:** IEEE Xplore  
**Linking Level:** Article DOI  
**Creation Date:** 04/29/2021 15:36:05 CDT  
**Modification Date:** 04/29/2021 15:54:50 CDT

Available for CDI search activation 

**Active for Search in CDI:** No  
**Search Rights in CDI:** Free  
**Full Text Rights in CDI:** Subscription (Linkresolver)  
**Full Text Linking in CDI:** Linkresolver  
**CDI Type:** Full Text Collection

**Collection ID:** 61815998080002441  
**MMS ID:** 9981635952102441

Electronic Service Editor

Activation Service Description Linking Portfolios Notes Group Settings History

General Linking Information

URL type ☐ Dynamic URL ☒ Parser Parameters

Parser IEEE::IEEE

Parser parameters url=https://ieeexplore.ieee.org & url2=https://ieeexplore.ieee.org/search/searchresult.jsp?

URL type (override) ☐ Dynamic URL ☒ Parser Parameters

Parser (override)

Parser parameters (override)

Linking level Article

Linking level (override)

Service is free? Not Free

Service is free? (override) ☐ Not Free ☐ Free

Crossref supported Yes

Crossref supported (override) ☐ Yes ☐ No

Crossref enabled ☐ No ☐ Yes ☒ INHERIT

Proxy enabled ☐ No ☒ Yes





# IEEE Xplore WorldCat Discovery Guide

[https://ieeexplore.ieee.org/Xplorehelp/downloads/discovery-services/worldcat\\_discovery.docx](https://ieeexplore.ieee.org/Xplorehelp/downloads/discovery-services/worldcat_discovery.docx)

WorldCat Central Index Collection Name
IEEE Publications Database
IEEE Xplore SMPTE Digital Library
IEEE Xplore Wiley eBooks
IEEE Xplore MIT eBooks
IEEE Xplore Morgan & Claypool eBooks
IEEE Xplore Now Publisher eBooks
IEEE Xplore Wiley Telecommunications eBooks


Worldcat KB Collection
IEEE Electronic Library (IEL)
IEEE Xplore SMPTE Digital Library
IEEE Xplore Morgan & Claypool Synthesis eBooks Library
IEEE-Wiley eBooks Library (IEEE Xplore)
IEEE Xplore MIT Press eBooks Library: Computing & Engineering Collection
IEEE Xplore now eBooks
IEEE eLearning Library
IEEE Xplore Wiley Telecommunications eBooks Library



# Link Resolver Configuration Guides

<https://ieeexplore.ieee.org/openurl>

## IEEE Xplore targets in link resolvers

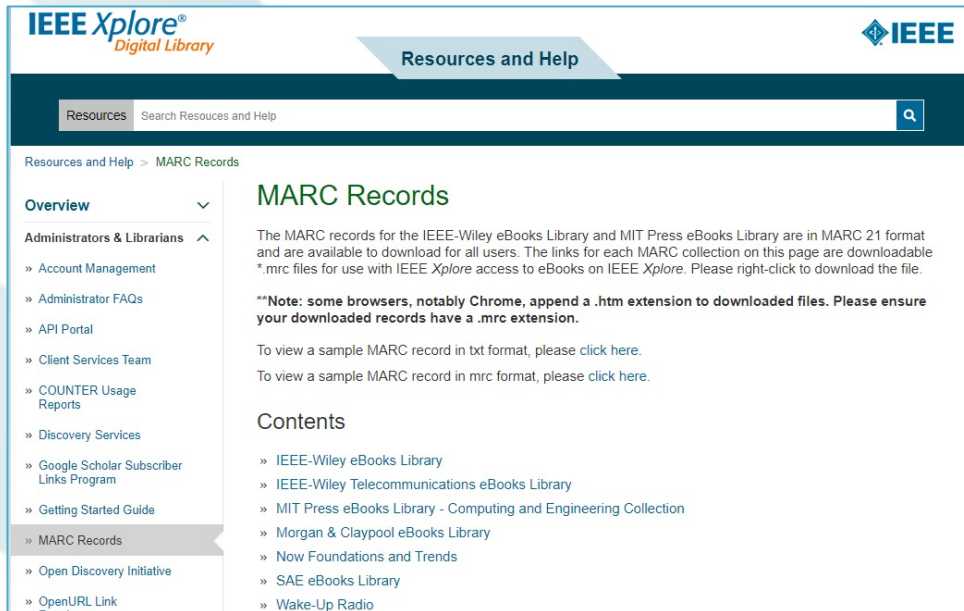




# MARC Records

<https://ieeexplore.ieee.org/marc-records>

## MARC for eBook Collections



The screenshot shows the IEEE Xplore Digital Library website. The top navigation bar includes the IEEE Xplore logo and a search bar. Below the navigation bar, there is a section titled "Resources and Help" with a sub-section "MARC Records". The "MARC Records" section contains an "Overview" tab, a list of "Administrators & Librarians" links, and a "Contents" section listing various eBook collections. The "Contents" section lists the following collections:

- IEEE-Wiley eBooks Library
- IEEE-Wiley Telecommunications eBooks Library
- MIT Press eBooks Library - Computing and Engineering Collection
- Morgan & Claypool eBooks Library
- Now Foundations and Trends
- SAE eBooks Library
- Wake-Up Radio

## MARC for eLearning Programs

### eLearning Courses

Download MARC records for IEEE eLearning courses below.

Please contact [onlinesupport@ieee.org](mailto:onlinesupport@ieee.org) regarding issues with MARC records.

IEEE eLearning Courses		
IEEE eLearning Library - Complete	Batch	Individual
IEEE eLearning EDP Library	Batch	Individual
Frontlist 2018	Batch	Individual
Frontlist 2019	Batch	Individual
Frontlist 2020	Batch	Individual
5G Networks	Batch	Individual
Artificial Intelligence and Ethics in Design	Batch	Individual
Artificial Intelligence and Ethics in Design: Responsible Innovation	Batch	Individual


All MARC records loaded to Alma.

Working with OCLC to load all MARC records to the Worldcat MARC.



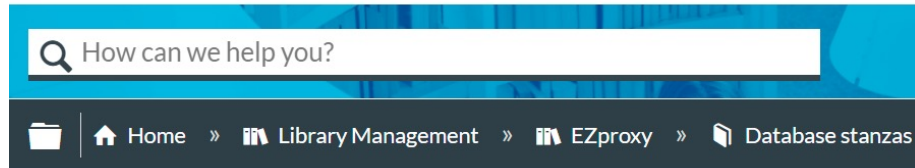


# Authentication Options on IEEE Xplore

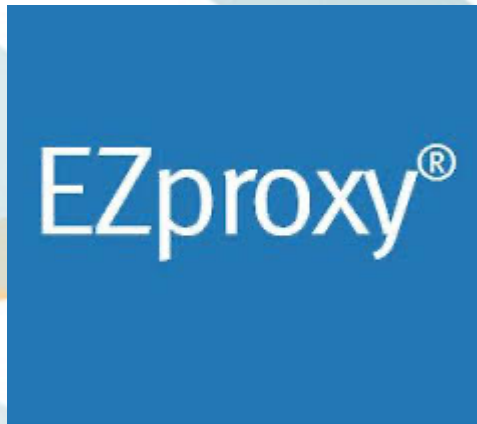
Type	Location	Access	Registration Form	
<b>Institutional</b>	On Campus	<a href="#">IPv4 / IPv6</a>	<a href="#">Change IPv4/IPv6 Address</a>	
<b>Institutional</b>	Off Campus	VPN	-	
		<a href="#">Secure Proxy Server</a>	<a href="#">Amend Ezproxy IP</a>	
		<a href="#">SAML</a>	<a href="#">Register SAML with IEEE Xplore</a>	
<b>Institutional</b>	Off Campus	<a href="#">Shibboleth</a>	<a href="#">Register OpenAthens/Shibboleth with IEEE Xplore</a>	
		<a href="#">OpenAthens</a>		
<b>Individual</b>		<a href="#">Member Sign In</a>	<a href="#">Join/Renew IEEE Membership</a>	
		<a href="#">Personal Sign In</a>	<a href="#">Create Free IEEE Personal Account</a>	
		<a href="#">COVID-19 U/P</a>	<a href="#">Request Temporary Remote Access</a>	
<b>Institutional + Individual</b>	On-to-Off Campus	<a href="#">Roaming Access</a>		
		<a href="#">Google Scholar CASA</a>		



# OCLC - EZProxy Stanza



IEEE Xplore



This stanza requires EZproxy 6.1.16.

```
Option X-Forwarded-For
Option DomainCookieOnly
AnonymousURL +http://staticieeexplore.ieee.org/*
AnonymousURL +https://staticieeexplore.ieee.org/*
Title IEEE Xplore (OCLC IncludeFile updated 20190702)
HTTPHeader -response -block Content-Security-Policy
URL https://ieeexplore.ieee.org/
HJ ieeexplore.ieee.org
HJ m.ieeexplore.ieee.org
HJ doi.ieeecomputersociety.org
HJ opac.ieeecomputersociety.org
HJ search.ieeexplore.ieee.org
HJ www.computer.org
HJ www.ieeexplore.ieee.org
HJ www.ieee.org
```

[https://help.oclc.org/Library\\_Management/EZproxy/Database\\_stanzas/IEEE\\_Xplore](https://help.oclc.org/Library_Management/EZproxy/Database_stanzas/IEEE_Xplore)

# Register Shibboleth/OpenAthens with Platforms

## OpenAthens / Shibboleth Registration Form

Please complete the form below to request OpenAthens or Shibboleth authentication to IEEE Xplore for your institution.

All fields required

Name \*

First Last

Institution \*

Phone Number \*

Email \*

Which authentication method does your institution require? \*

☒ OpenAthens

☐ Shibboleth

Enter your OpenAthens Organization ID \*

Please select the identity Federation your institution will use \*

If you chose Other, please provide the Federation

☐ I have read and accept [IEEE Privacy Policy](#).

☐ I would also like to receive information on additional IEEE products, services, and events.
















<https://ieeexplore.ieee.org/Xplorehelp/online-forms/openathens-and-shibboleth-registration-form>





# EDS Guides for Publisher Content

## EBSCO Discovery Service Quick Reference Guides

-  Brill
-  Canadian Electronic Library
-  Gale Cengage Learning
-  IEEE (Institute of Electrical and Electronics Engineers)
-  Knovel
-  Newsbank
-  OECD (Organization for Economic Cooperation and Development)
-  Oxford University Press
-  SAGE
-  Science Direct
-  Springer
-  Wiley
-  World Book

## Full Text Finder Quick Reference Guides

-  Brill
-  Canadian Electronic Library
-  IEEE (Institute of Electrical and Electronics Engineers)
-  Knovel
-  OECD (Organization for Economic Cooperation and Development)
-  Oxford University Press
-  Science Direct
-  Springer

<https://connect.ebsco.com/s/article/EBSCO-Discovery-Service-Publisher-Guides>



# Ex Libris Central Discovery Index

CDI is a central discovery index – leveraging existing assets - that supports both Summon and Primo and delivers enhanced discovery, streamlines library management, and provides operational efficiencies.



[https://knowledge.exlibrisgroup.com/Primo/Content\\_Corner/Central\\_Discovery\\_Index](https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index)

# Stay Connected



Website

<https://www.niso.org/standards-committees/odi>



ODI Updates

<https://www.niso.org/standards-committees/odi/updates>



Mailing List

<http://groups.niso.org/lists/opendiscovery/>



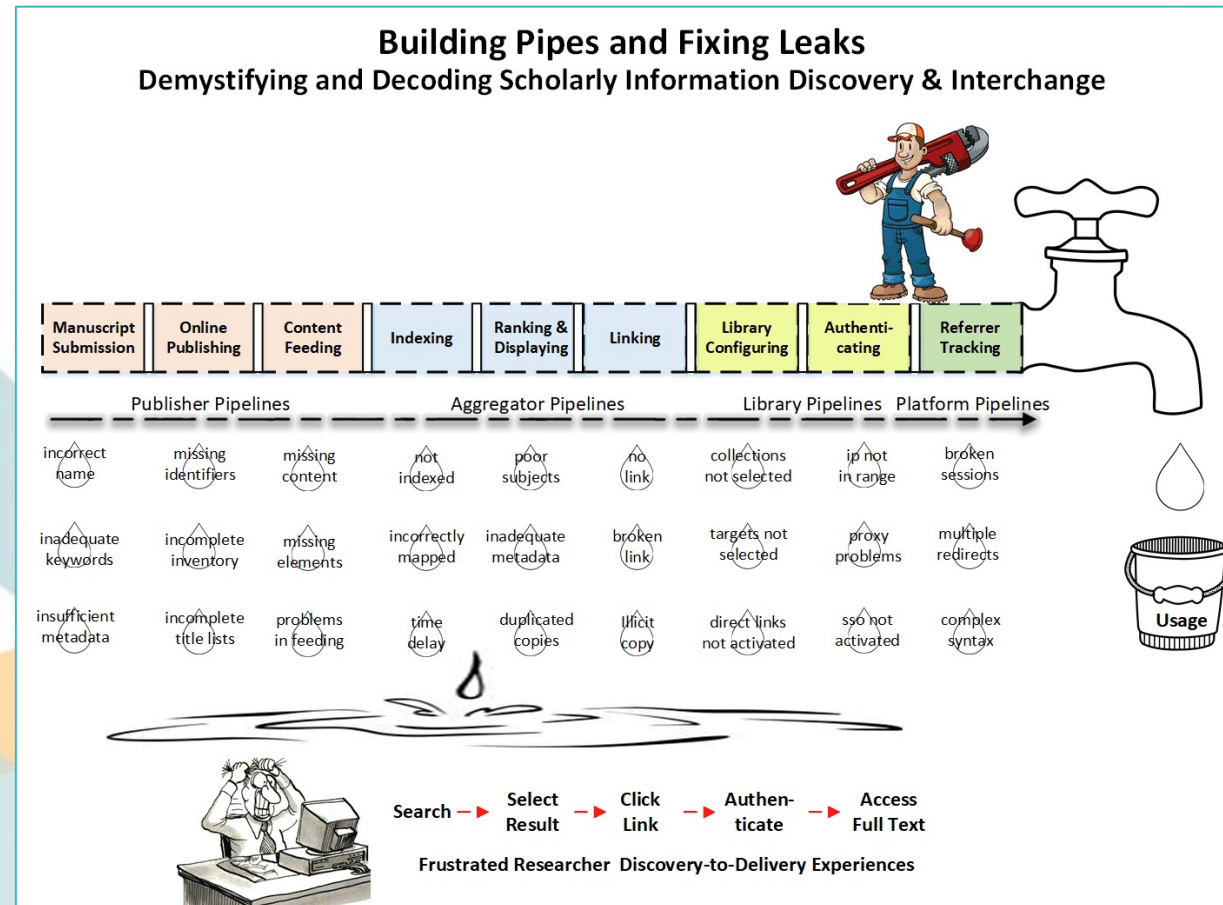
Twitter

[https://twitter.com/NISO\\_ODI](https://twitter.com/NISO_ODI)





# Happy Metadata Plumbing!



Zhu, Julie. <https://scholarlykitchen.sspnet.org/2019/07/11/building-pipes-and-fixing-leaks-in-scholarly-content-discovery-and-access/>



**Thank you! Questions?**

<https://www.niso.org/standards-committees/odi>  
[odi@niso.org](mailto:odi@niso.org)

Teresa Hazen [hazent@arizona.edu](mailto:hazent@arizona.edu)

Julie Zhu [zhu.j@ieee.org](mailto:zhu.j@ieee.org)

