Open Discovery Initiative Recommended Practice (2020): Roles for Publishers, Discovery Service Providers and Libraries

ERMB 2021 Meeting
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Julie Zhu
NISO ODI Standing Committee / IEEE
Introduction

Julie Zhu

• Senior Manager, Discovery Partners, IEEE
• Joined KBART II Working Group in 2010
• Joined ODI Standing Committee in 2014
• NISO Anne Marie Cunningham Service Award 2021
• Zhu.j@ieee.org
KBART & Non-English Content

• Presented at the 2018 China-U.S. Forum on Standards for Digital Resources
• KBART III Work Item
  – Improved support for global content, including those with non-Latin characters
    • Translated title
    • Transliterated title
    • Language of content
    • Names of authors/editors
Outline

1. Overview of the Open Discovery Initiative
2. Roles for Content Providers, Discovery Service Providers and Libraries
3. Resources
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
Discovery Pipelines

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
# ODI Standing Committee Roster

<table>
<thead>
<tr>
<th>Libraries</th>
<th>Content Providers</th>
<th>Discovery Service Providers</th>
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</thead>
<tbody>
<tr>
<td>Marshall Breeding, Independent Consultant</td>
<td>Geoff Morse, Northwestern University</td>
<td>Scott Bernier, EBSCO Information Services</td>
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<tr>
<td>Noah Brubaker, PALNI</td>
<td>Laura Morse, Harvard University</td>
<td>Rachel Kessler, Ex Libris/ProQuest</td>
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<td>Teresa Hazen, University of Arizona</td>
<td>Ken Varnum, University of Michigan</td>
<td>Jay Holloway, OCLC</td>
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<tr>
<td>Geoff Morse, Northwestern University</td>
<td>Laura Morse, Harvard University</td>
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<td>Ken Varnum, University of Michigan</td>
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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

- Table:

<table>
<thead>
<tr>
<th>Monograph &amp; Serials</th>
<th>Articles/Documents</th>
<th>Manuscripts/Unpublished Content</th>
<th>Media Content Image</th>
<th>Media Content Recording</th>
<th>Media Content Motion Image</th>
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</thead>
<tbody>
<tr>
<td>Nature</td>
<td>Derivation of pluripotent stem cells from cultured human primordial germ cells</td>
<td>The evolution of cooperative neural crest specification in the domestic dog (Canis familiaris)</td>
<td>Portrait of Françoise en costume tailleuse</td>
<td>Panama</td>
<td>The Smell of Green Papaya</td>
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<tr>
<td>Shalbritt, MJ, Axelmann, J, Wang, SP, Bugg, EM, Littledfield, J, Donovan, PJ, Blusenthal, PD, Huggins, GR, Gearhart, JD</td>
<td>Webber, Victoria Elizabeth</td>
<td>Picasso, Pablo</td>
<td>Armstrong, Louis</td>
<td>Tran, Anh-Dung; Lu, Mai San; Truong, Thi Loc; Yen-Khe, Tran Ng; Delhomme, René; Abril, Jean-Philippe; dedieu, Nicole; Kopp, Jean-Pierre; Rossignol, Christophe; Negre; Alain, Tom-That, Tiet</td>
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Content Provider Role

Fair Linking

• Data should be provided to support Open URL resolution, see:
  
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
  - Collection level
  - Title level
- **Fair linking**
- **Metrics**
- **Open Access**
Discovery Provider Role

Transparency

- Collection level metadata

- Title level metadata
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 relationships 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
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 Providers and Discovery Service Providers.
Resources for Content and Discovery Providers

• Content Provider FAQ
  https://www.niso.org/standards-committees/odi/content-provider-faq

• Implementation Guide

• 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
Stay Connected

• 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
We Are All Data Plumbers!

Thank you! Questions?

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