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Cracking the Discovery Code

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Cracking the Discovery Code

Karen Hawkins, Senior Director, Product Design, IEEE
Graham Stone, Information Resources Manager, University of Huddersfield
Oliver Pesch, Chief Product Strategist, EBSCO Information
Martha Sedgwick, Executive Director of Product Innovation, SAGE
Discovery Services are Pervasive

The use of webscale discovery services by libraries has grown dramatically since their introduction in 2009/2010

- Ithaka S&R’s 2013 Library Survey showed that 86% of respondents from doctoral institutions have implemented a discovery service
- Uptake is also growing in corporations and government libraries

Note - Readings and resources are included on the last slide
Goals of this Session

- Optimize discovery of your content by end users
  - Create awareness of the growing importance of discovery services in the access to scholarly content
  - Provide actionable knowledge to enable effective collaboration with libraries, discovery service providers, Open URL providers and platform providers
What is a Webscale Discovery Service?

- A means of uncovering enterprise information through a simple single search
- Content searched may include full-text library subscriptions, A&I databases, and institutional repositories
- Examples include EBSCO Discovery Service, Primo, Summon, and WorldCat Local

Sources: Outsell, Webscale Discovery Services: The Evolution Continues, August 21, 2014
Ithaka S&R US Library Survey 2013
Traditional Researcher Routes to Articles

Discovery Service Routes to Articles

Figure 1. Web-Scale Discovery with Knowledge Base

Source: Outsell analysis
About the IEEE

- World’s largest technical membership association with nearly 429,000 members in over 162 countries
- Not for profit organization with tagline “Advancing Technology For Humanity”
- Four Core areas of activity
  - Membership organization
  - Conferences organizer
  - Standards developer
  - Publisher
IEEE’s Discovery Journey

We publish approximately one-third of the world’s English-language literature in our technologies

- 170+ periodicals
- 1,200 annual conference proceedings
- 1,500 technical standards
- Ebooks and eLearning courses
Structure of Discovery

- Each Discovery Service is different
- Within the same Discovery Service wide divergence of options and library implementations
- Single search box/unified index a strength and weakness from a publisher’s perspective
A Publisher’s Actions to Optimize Discovery

- IEEE created a Discovery webpage for subscribing libraries.
- We partnered with discovery services to create library implementation guides for our subscribers.
- We are involved in industry groups working on standardization and best practices.
- We created a full time position to understand and address complexities of discovery indexing and linking and provide subscriber support.
Services Work Best When We Collaborate – Actions You Can Take

- A Library Perspective: Graham Stone, Information Resources Manager, University of Huddersfield
- A Discovery Service Perspective: Oliver Pesch, Chief Product Strategist, EBSCO Information
- A Publisher Perspective: Martha Sedgwick, Executive Director of Product Innovation, SAGE
Cracking the Discovery Code: why discovery appeals to librarians

Graham Stone
Information Resources Manager
Some context

- **Webscale discovery systems**
  - Pre-harvested content with a single search interface
  - On the market for approximately 5 years
  - Summon, Worldcat local, Primo Central, Ebsco Discovery Service

- **Federated search and link resolvers**
  - Out of scope for this session
  - Although still important!
  - …and don’t forget KBART (more on that later)
UK’s 1st Summon customer
2009

University of Huddersfield

http://library.hud.ac.uk/summon

Research has never been so easy.
“Why is Google so easy and the library so hard?”
[Tenopir, 2009]

“Why do we want to teach our users to be librarians?”
[Pattern, 2009]
What do we know about webscale discovery?

- Web Scale Discovery Services increase accessibility of e-resources and will definitely on the whole increase full-text downloads
- Undergraduates generally love discovery services
- Librarians reactions towards discovery services are mixed at best

Aaron Tay, Senior Librarian at National University of Singapore

8 things we know about web scale discovery systems in 2013

http://tinyurl.com/nafluz
The usage element

- Libraries are under increasing pressure to show value for money
- Work on the Library Impact Data Project has shown a link between e-resource usage and attainment/retention
COUNTER downloads

Big deal 1
COUNTER downloads

Big deal 2
COUNTER downloads

Big deal 3

Inspiriting tomorrow’s professionals
COUNTER downloads

Society publisher
COUNTER downloads
Publisher not indexed in Summon

![Graph showing COUNTER downloads from 2004/05 to 2011/12. The years 2006/07, 2007/08, and 2008/09 have the highest downloads.](image)
COUNTER downloads

Full text aggregator – in Summon!

![Bar chart showing COUNTER downloads from 2008/09 to 2013/14]
COUNTER downloads

Full text aggregator – not in Summon!
COUNTER downloads
A&I database
The bigger picture

It’s not just a Huddersfield thing

- Grand Valley and Manitoba saw a dramatic increase in FT downloads for e-journals and a drop in A&I after Summon implementation
- UTSA saw FT downloads increase by 23% after Summon implementation
- ODU saw increases after implementation of WorldCat Local
  - “…lowest amount of usage in a single month for the year of 2011 was higher than the highest usage month in 2010”
The user’s view

Enhancing the student experience

https://flic.kr/p/ohRcCA
Abdul
PHD student and part-time lecturer

Summon is bloody brilliant… …It gives fast, efficient and above all relevant search results
You’ve not got as many fiddly bits to do; you just type in what you want. It’s almost like Google Scholar, so I like it for that.
I love Summon, even an idiot like me can use it
The librarian’s view

*Culture shock?*
If your idea of a “good time” is to scare undergraduates in training sessions by showing them journal database interfaces — “it’s OK, I’m a friendly librarian and I’m here to show you just how hard it can be to find an article!” — then it’s probably high time you sought medical counselling ;-)"
What Summon frees me to do... particularly in freshman courses, is to focus more on the concepts of information literacy that this system so elegantly demonstrates. What is peer-review? Why does it matter? What is the difference between Google and the library? How does Google decide what to show you? Summon? Why isn't the stuff in Summon in Google?”
The greatest impact on the way we teach information literacy is that it feels much simpler than having to go through lots of different databases with students.
Cancellation and acquisition

A deal breaker?

• TERMS top 14 deal breakers when licensing electronic resources

• #10 Ability to use the resource and resource records with third party discovery tools

https://library3.hud.ac.uk/blogs/terms/terms/acquiring-new-content/
Thank you!

Graham Stone
g.stone@hud.ac.uk
@Graham_Stone

#6terms
http://eprints.hud.ac.uk/21270

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Cracking the Discovery Code: the perspective of a discovery service provider

Oliver Pesch
Chief Product Strategist
EBSCO Information Services
The discovery balancing act...
The discovery balancing act...
Success for librarians is:

- Providing a full suite of resources for users
- Getting the user to use and be successful with library-provided resources
- Having positive impact on the institution’s outcomes and demonstrating a positive ROI
Success for the user is:

- Enter a short query and have relevant items show within the first page of results
- Have direct access to their full text
- Achieve instant gratification.
The effect on discovery services...

• Comprehensiveness of content/features
• Relevance
• Profiling users/disciplines
• Full text matters too
Comprehensiveness...
Comprehensiveness...

- Breadth of information
- Depth of information
- Features
Relevance...
Challenge...

Make sure the most relevant articles show in the first page of results!

Leveraging subjects and keywords is important.
Disciplines and Profiling users...
1. Co-Occurrence of Dissociative Identity Disorder and Borderline Personality Disorder.

Ross, Colin A.; Ferrell, Lynn; Schroeder, Elizabeth; Journal of Trauma & Dissociation, 2014 Jan-Feb; 15 (1): 79-90. (journal article - research, tables/charts) ISSN: 1529-9732 PMID: 24377974, Database: CINAHL Plus with Full Text

Subjects: Borderline Personality Disorder Diagnosis; Multiple-Personality Disorder Diagnosis; Borderline Personality Disorder Epidemiology; Multiple-Personality Disorder Epidemiology; Adult: 19-44 years; Middle Aged: 45-64 years; Male; Female

2. The Presentation of Narcissistic Personality Disorder in an Octogenarian: Converging Evidence from Multiple Sources.

By: BALSIS, STEVE. Clinical Gerontologist, Jan-Feb 2011, 34 (1). 71-87. (Journal Article), Database: AgeLine

Subjects: Personality Disorders; Adaptation; Adult Children; Older Adults; Aging; Diagnosis; Literature; Interpersonal Relations; Interviews; Abilities; Research Techniques; Mental Disorders; Psychological Tests; Reminiscence; Self Esteem; Self Concept; Social Networks; Symptoms; Adults of All Ages; Life Course

3. Multiple Personality Disorders: A Medical Dictionary, Bibliography, and Annotated Research Guide to Internet References

By: Parker, Phillip M.; Parker, James N. San Diego, CA : ICON Health Publications. 2004. eBook ., Database: eBook Collection (EBSCOhost)

Subjects: PSYCHOLOGY / Psychopathology / Dissociative Identity Disorder; Multiple personality--Dictionaries; Multiple personality--Computer network resources; Multiple personality--Bibliography


(Includes abstract) Boysen GA; Vanbergen A; Journal of Nervous & Mental Disease, 2013 Jan; 201 (1): 5-11. (journal article - research) ISSN: 0022-3018 PMID: 23274288, Database: CINAHL Plus with Full Text

Subjects: Multiple-Personality Disorder Diagnosis; Multiple-Personality Disorder Epidemiology; Multiple-Personality Disorder Etiology; Adult: 19-44 years
**Databases for Engineering**

- **Compendex**: Coverage: 1973-current
- **Scopus**: Coverage: 1825-current
- **Web of Knowledge**: Coverage: 1990-current

**Compendex** via Engineering Village is the largest and most comprehensive interdisciplinary engineering database available. You can search by keywords or author names to find references to journal articles and conference papers on your subject from 1969 onwards. A guide to searching Compendex and importing results to RefWorks is available.

**Scopus** is a broadly based database: good for interdisciplinary research.
Answers vs results...
Challenge...

Sometimes the user is looking for an answer and not just “results”.

• Initial research on a topic
• Point-of-care
• Unsure of what they are looking for
Research Starter

Stockholm Syndrome.

Named after a 1973 bank robbery and hostage situation that occurred in Stockholm, Sweden, Stockholm syndrome, also referred to as capture bonding, is a... More

Salem Press Encyclopedia, 2013

1. Stockholm Syndrome
   - Subjects: PSYCHOLOGY / Mental Health; Stockholm syndrome
   - e-bok Full Text, Download (Offline)

2. STOCKHOLM SYNDROME AS VERNACULAR RESOURCE.
   - Subjects: STOCKHOLM syndrome; HUMAN trafficking; INTERNATIONAL relations; VICTIMS of crimes; SOCIAL problems; SPOUSAL abuse

3. ‘Stockholm syndrome’: psychiatric diagnosis or urban myth?
   - Subjects: STOCKHOLM syndrome; HOSTAGES -- Psychology; KIDNAPPING victims; MASS media; VICTIMS of crimes

4. Witches, Spies and Stockholm Syndrome: Life in Medieval Ireland
   - In: ProtoView. August 2014; Ringgold, Inc. Language: English, Database: Academic OneFile
   - Subjects: Books -- Book reviews; Witches, Spies and Stockholm Syndrome: Life in Medieval Ireland (Nonfiction work) -- Book reviews
Stockholm Syndrome

Named after a 1973 bank robbery and hostage situation that occurred in Stockholm, Sweden, Stockholm syndrome, also referred to as capture bonding, is a psychological phenomenon that hinges on a paradox: Hostages adopt sympathetic and positive attitudes towards their captors and identify with them, sometimes to the point of adopting the same beliefs.

Overview

Stockholm syndrome is viewed as a psychological response of a hostage or an individual in a similar situation in which the more dominant person has the power to put the victim's life in danger. Captors use this as an advantage to make victims comply with their demands, and captives use this as a survival strategy. Experts have ascertained four characteristics common to individuals who become enmeshed in scenarios leading to Stockholm syndrome: (1) Hostages/victims have positive feelings for their captors; (2) Captives do not have a prior relationship with their captors; (3) Hostages/victims exhibit anger, fear, and general distrust toward police and other authorities; and (4) Captors come to think of their captives positively, seeing them as full human beings.

However, experts believe that these characteristics do not always occur together. Research indicates that captives will be more likely to develop Stockholm syndrome in instances where (1) their captors do not harm or abuse them; (2) the hostage situation lasts for a long time before it is resolved; (3) captive and captor have prolonged contact; and (4) the contact is characterized by a high level of emotion. But even experts disagree over the finer points of these elements. Some argue that the key is the intensity of the hostage situation, as opposed to its actual length, while others contend that the most important factor is the lack of physical and mental abuse in the captor/captive relationship.
Looking for a specific database?

Web of Science

Web of Science is an online subscription-based scientific citation indexing service maintained by Thomson Reuters that provides a comprehensive citation search. It gives access to multiple databases that reference cross-disciplinary research, which allows for in-depth exploration of specialized sub-fields within an academic or scientific discipline.

1. The Science of Web Surveys
   By: Tourangeau, Roger; Couper, Mick; Conrad, Frederick G. Oxford : Oxford University Press. 2013. eBook. Database: eBook Collection (EBSCOhost)
   Subjects: SOCIAL SCIENCE / Research; SOCIAL SCIENCE / Methodology; Social surveys—Data processing; Social surveys—Methodology; Questionnaires; Internet surveys

2. Web Social Science: Concepts, Data and Tools for Social Scientists in the Digital Age
   Subjects: SOCIAL SCIENCE / Reference; SOCIAL SCIENCE / Essays; Internet--Social aspects--Research; Social sciences--Research--Computer network resources; World Wide Web--Social aspects--Research

3. XML and Web Technologies for Data Sciences with R
   Subjects: COMPUTERS / General; R (Computer program language); XML (Document markup language)
Full text matters...
Challenges...

Users want full text, but the “full text” that makes up the library resources almost always extends beyond the full text provided by the discovery vendor.
Intelligent full text linking that understands customer subscriptions and direct links to publisher content.
Publishers...

Success to publishers is:

• Users discovering publisher’s content
• Users accessing publisher’s content
• Their content being recognized for adding value to the scholarly research process
Improving discoverability...

• Provide your metadata AND full text (for indexing) to discovery vendors
• Include abstracts, subject terms and author-supplied keywords with the metadata
  – Make sure keywords are specific enough
• Encourage A&I services to cover relevant titles
Improving access...

• Provide knowledge base providers with up-to-date KBART lists of titles covered
• Identify any Open Access journals or Open Access articles in subscribed journals
• Implement a simple yet forgiving link syntax – either DOI-based or support simple OpenURL syntax
• Be smart about authentication – think beyond IP addresses
Measuring success...
Challenge...

How do you know if providing your metadata to a discovery service or other content provider is improving access?
Web log analysis might be flawed...

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<tr>
<td>1. Privacy of Mental Health Records</td>
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<td>2. International Models of Child in Divided Families</td>
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<td>3. Parental Divorce and Child in Divided Families</td>
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<td>4. Parental marital conflict and child in Divided Families</td>
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<td>5. CHILDREN'S AND PARENTS? PERCEPTIONS</td>
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<td>6. Barriers and Supports to Divorce</td>
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<td>7. Special issue on attachment</td>
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<td>8. Living in two homes—a Swedish family</td>
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<td>9. Dealing with the Financially</td>
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<td>10. Parental divorce and adult</td>
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<td>Other Aggregator</td>
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Consider discovery service reporting...

Ask for metric types such as:

• Full text requests
• Linkouts - Publisher site
• Linkouts - Link Resolver
• Result Clicks
• Record Views
Consider discovery service reporting...

This could help you understand how often your items are being discovered (result clicks) and how often the user’s discovery results in a full text request (hosted, publisher site or through link resolver)
A new COUNTER report?

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</table>
Next steps for publishers...

• Make sure providing accurate and up-to-date metadata is a priority
• Check that your linking and authentication makes it easy for authorized users to get to your full text
• Think standards and best practices
Cracking the discovery code?
ALPSP International, Sept. 2014

Martha Sedgwick
Executive Director of Product Innovation, SAGE
86 Cultural geography

Geographers are only too aware that finding a plot of ground likely to yield either food or flowers is very often about more than structures of feeling. Historically, securing the right to produce has been tied to visions of material progress (Tuan, 2002), based on a radical politics of protest and community action (Howkins, 2002), forestalled by exploitative, embodied regimes of colonial control (Duncan, 2002), and in specific instances enabled by state intervention as a route towards moral and physical improvement (Linehan and Gruffudd, 2004). Foregrounding the destructive body politics of fruit harvesting in California, Mitchell (2003a) connects his own family’s privileged domesticity to the material difficulties endured by others to simply ‘get by’ in life; all of which would seem geographically distant and qualitatively different from the well-being (or affect) of ‘holding on’ and the exuberant joys of ‘going further’. Yet, just as the experience of physical effort does not fall neatly into opposing registers of pleasure or pain, the two realms of research are not irremovable, political science, and a means to do justice through experiments in ‘cosmopolitics’. Through modest engagement such contributions consciously reach out to other (non-academic, non-human) communities, and in so doing gesture towards an emancipatory potential in the geographical turn towards earthly practice and its spaccings of performance. For Cresswell (2002; 2003) – keen to splice non-representational argument with the structurings of Pierre Bourdieu and Raymond Williams – and Szerszynski (2003) – who finds in Hannah Arendt’s writings on labour, work and action a useful resource to rethink the ecological imperatives of performance – such work will probably communicate a desirable brand of critical, earthly activism.

III Coming back – home

In everyday life, the journey from garden to home is a short and convenient one; similarly so in recent geographical research. Amid the juggling of domestic living, cultural geographers are finding an ideal environment to better understand the habitual practices
Scholarly Communication Supply Chain

Content Providers
- Authors
- Editors
- Publishers

Service Providers
- Online platforms
- Social media
- ERMs
- Search engines
- Librarians

Institution
- End users
- Library interfaces
Understanding discovery

- Open web search
- Library search
- Academic / A&I search
- Within the SAGE universe
## Academic search – what we do

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<th>Bounce rate</th>
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<th>Visit length</th>
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<tbody>
<tr>
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<td>85%</td>
<td>1</td>
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</tr>
<tr>
<td><strong>Library</strong></td>
<td>29%</td>
<td>4</td>
<td>4:88</td>
</tr>
<tr>
<td><strong>Academic</strong></td>
<td>26%</td>
<td>6</td>
<td>3:02</td>
</tr>
</tbody>
</table>
Open Web Search – what we know

- Everyone uses it!
- ~50% of all SAGE database traffic
- Simple and user friendly

Use case: quick search, exploring new topic
Open Web Search: what we are doing

● Product dashboards with SEO metrics
● Development roadmaps with SEO goals
● SEO standards compliance
● Structured mark-up & semantic enrichment
● Strong relations w. search engines
● SEO bi-annual audits
● SEO Q/A testing
● Internal SEO analyst
● Search engine trend watch
Open web search

Usage / Traffic Source

- Open web
- Library
- Academic
- Social media
- Direct
- Unknown / other
Open web search

Usage / Traffic Source
Jan-Jul 2013

- Open web
- Library
- Academic
Open web search

Usage / Traffic Source
Jan-Jul 2014

Open web
Library
Academic
Library search – what we know

- Discovery Services
- Catalogues
- A-Z Lists
- Research Guides
Library discovery – what we are doing

- Dedicated Discoverability Analysts
- Development roadmaps with library goals
- Regular feeds to vendor systems with full text & metadata
- KBART lists to knowledge bases
- Standards work – ODI NISO working group, KBART, PIE-J and industry collaborations
- Discovery evaluations for low-use institutions
- Strong relations with discovery vendors
- Focus on metadata improvements
- Staff development / training
- Widgets & LibGuides
Library search – what we do

Referrals from library sites 2011 / 2014

Jan 1, 2011 - May 31, 2011: Sessions
Jan 1, 2014 - May 31, 2014: Sessions
Cross-sector research
Academic / A&I search – what we know

- “Power” users
- Use case: deep research, building expertise
Academic search – what we are doing

- Product dashboards with targeted metrics
- Development roadmaps with targeted goals
- Standards compliance & leadership inc.
  encouraging A&I services to cover relevant titles
- Trend watch & analysis
- Google Scholar relations
- Staff development / training
Integrated SAGE product offering

- Cross-product interlinking driven by semantic analysis
- Faceted search through controlled vocabulary tags
- Editorial influence in search results for some products
SAGE White Paper: Collaborative Improvements in the Discoverability of Scholarly Content

Collaborative Improvements in the Discoverability of Scholarly Content
Accomplishments, Aspirations, and Opportunities

A SAGE White Paper

Mary M. Somerville, MA, MLS, PhD,
University Librarian and Library Director,
University of Colorado Denver, USA
(CRCID: http://orcid.org/0000-0002-1401-9225)

and

Lettie Y. Conrad, MA,
Executive Manager, Online Products,
SAGE, Los Angeles, California, USA
(CRCID: http://orcid.org/0000-0002-1384-7037)

www.sagepublications.com
Some things we need to focus on:

- Metadata – quality & compliance
- Standards – advocacy & adoption
- Transparency – cross-sector cooperation
- Partnerships – co-development
Questions?

Karen Hawkins  k.hawkins@ieee.org
Graham Stone  g.stone@hud.ac.uk
Oliver Pesch  opesch@ebsco.com
Martha Sedgwick  martha.sedgwick@sagepub.com
References, Readings, and Resources

- Ithaka S+R US Library Survey, March 11, 2014
- Web-Scale Discovery Services: The Evolution Continues, Outsell, August 21, 2014
- IEEE Discovery Service page for Libraries, including implementation guides
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- Emery, Jill and Stone, Graham (2013) TERMS: Techniques for electronic resources management. Library Technology Reports, 49(2). pp. 5-43
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- Recommended Practice for the Presentation and Identification of E-Journals (PIEJ) [www.niso.org/workrooms/piej](http://www.niso.org/workrooms/piej)
- Project COUNTER [http://www.projectcounter.org/](http://www.projectcounter.org/)
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Mary M. Somerville, MA, MLS, PhD,
University Librarian and Library Director,
University of Colorado Denver, USA
(CRCID: http://orcid.org/0000-0002-4264-8335)
and
Lottie Y. Conrad, MA,
Executive Manager, Online Products,
SAGE, Los Angeles, California, USA
(CRCID: http://orcid.org/0000-0003-1580-7027)

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