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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



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



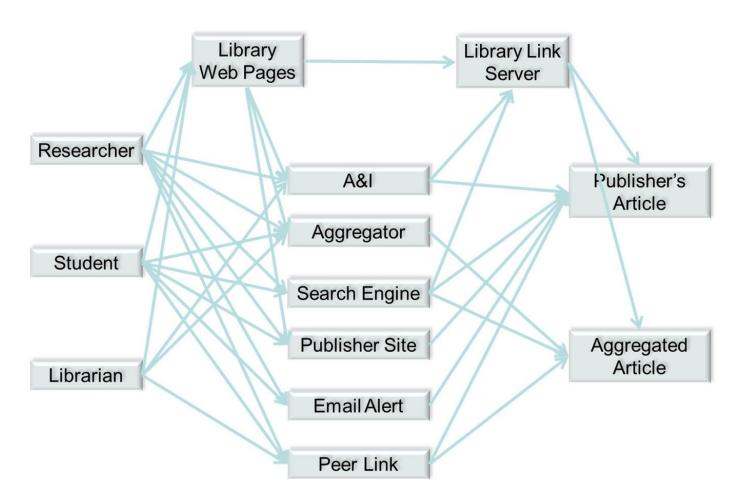
What is a Webscale Discovery Service?

- 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

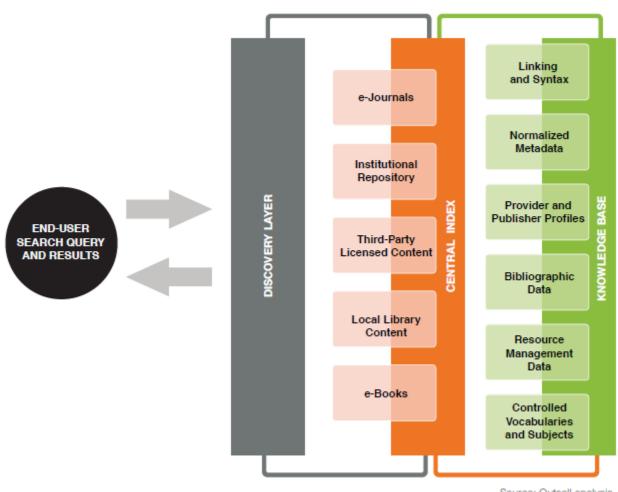


Source: How Readers Discover Content in Scholarly Journals, Renew Training, July 2012, p5



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





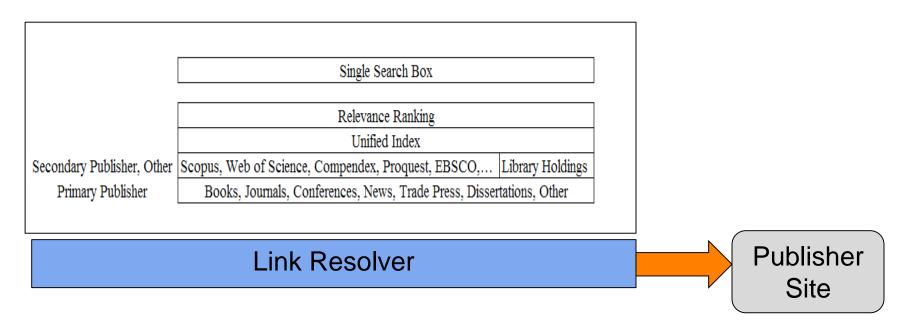
IEEE's Discovery Journey

- 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



E-resources @ Huddersfield

University of HUDDERSFIELD

"Why is Google so easy and the library so hard?" [Tenopir, 2009]



http://www.flickr.com/photos/manfrys/2226178289/

Inspiring tomorrow's professionals



http://www.flickr.com/photos/ppl_ri_images/4019188259/

"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 fulltext 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/naflluz

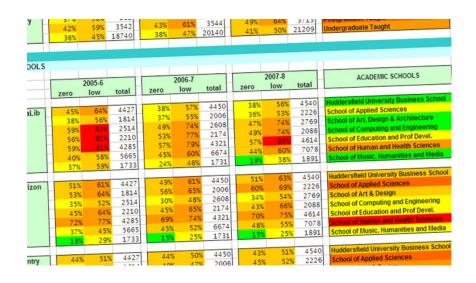








- Libraries are under increasing pressure to show value for money
- Work on the Library Impact Data Project has shown a link between eresource usage and attainment/retention



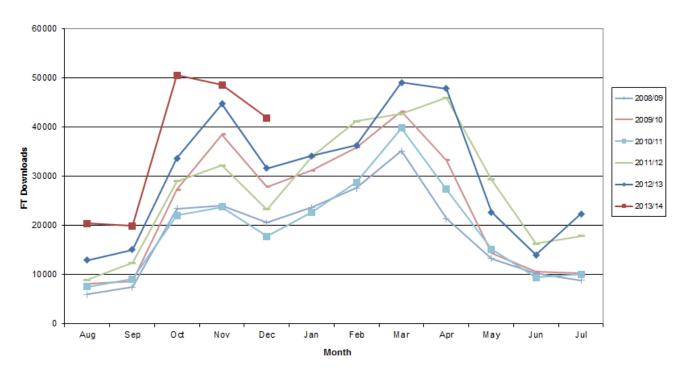








Big deal 1





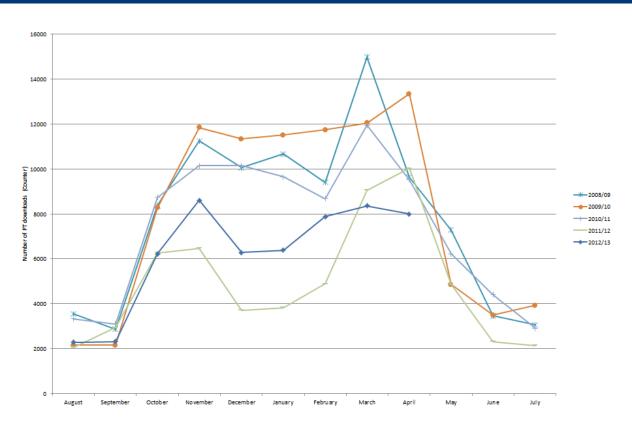








Big deal 2





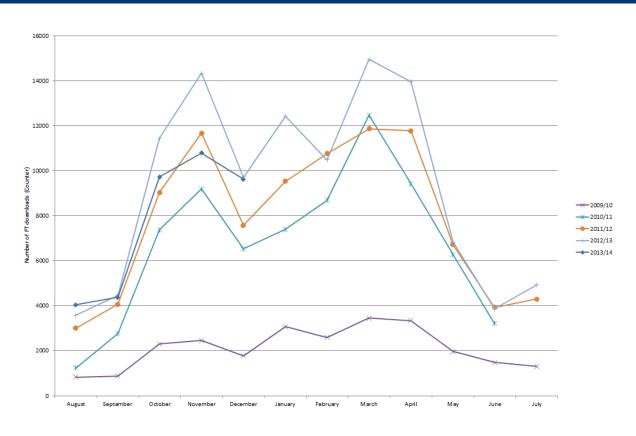








Big deal 3







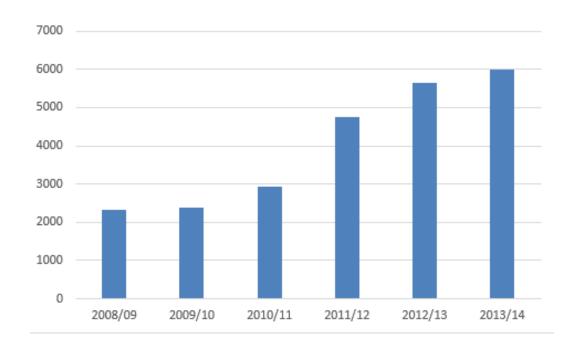






Society publisher

University of HUDDERSFIELD





UNIVERSITY OF THE YEAR

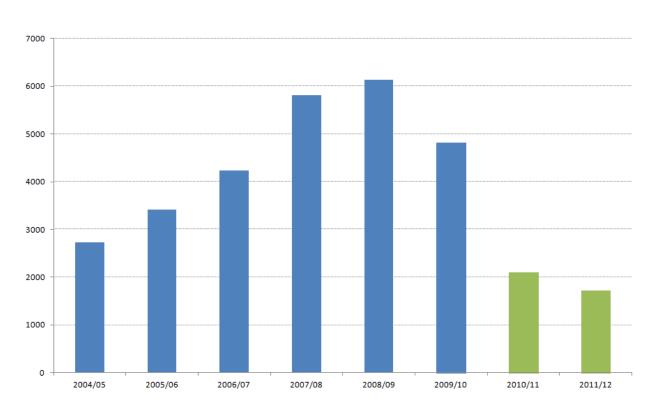






Publisher not indexed in Summon

University of HUDDERSFIELD



Inspiring tomorrow's professionals

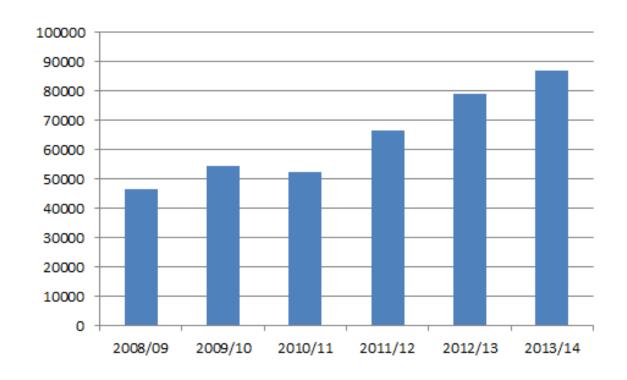








Full text aggregator – in Summon!



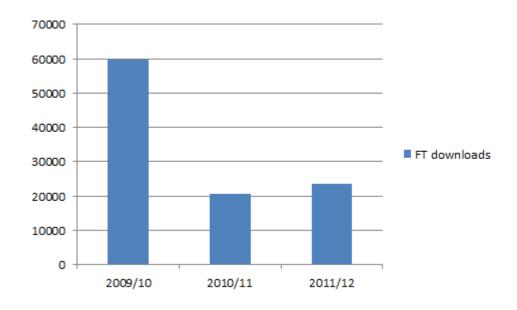








Full text aggregator - not in Summon!





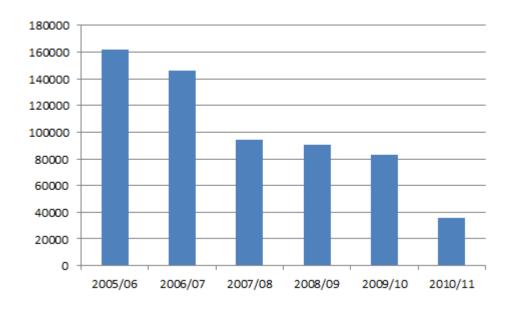








A&I database













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









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?

University of HUDDERSFIELD



https://flic.kr/p/btbrEW









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?"









Dr Antony Osborne

Academic Librarian, University of Huddersfield

University of HUDDERSFIELD

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



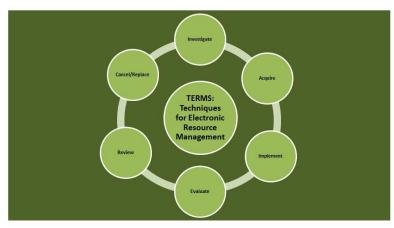






 TERMS top 14 deal breakers when licensing electronic resources

 #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!

University of HUDDERSFIELD

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...

Users & Librarians

Publishers /content providers

Discovery Services



The discovery balancing act...

Publishers
/content
providers





Librarians...

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



Users...

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...

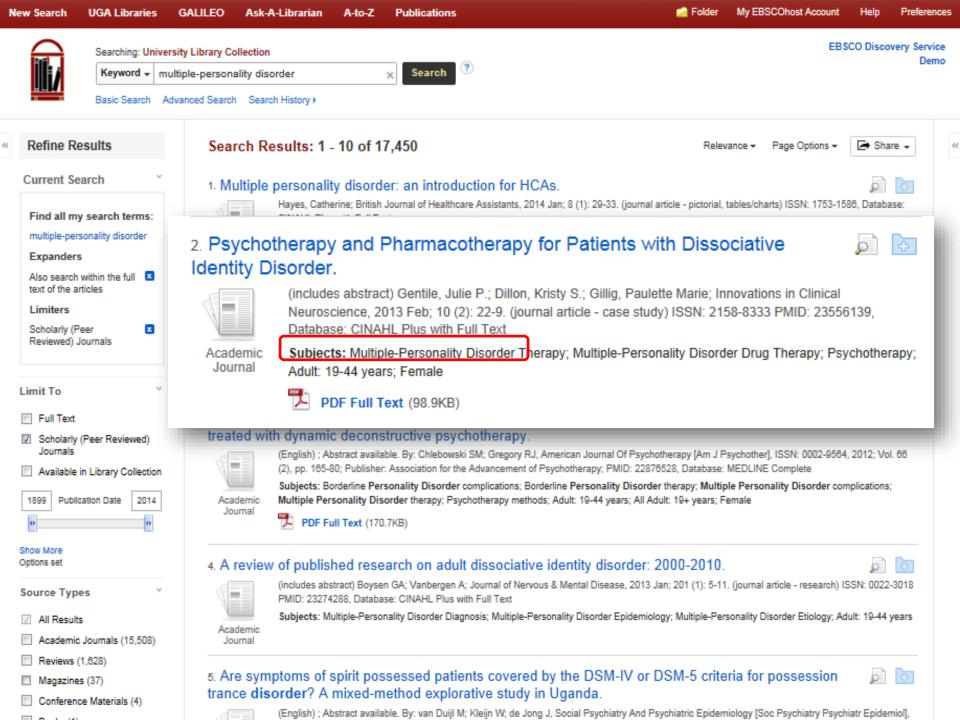


Challenge...

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

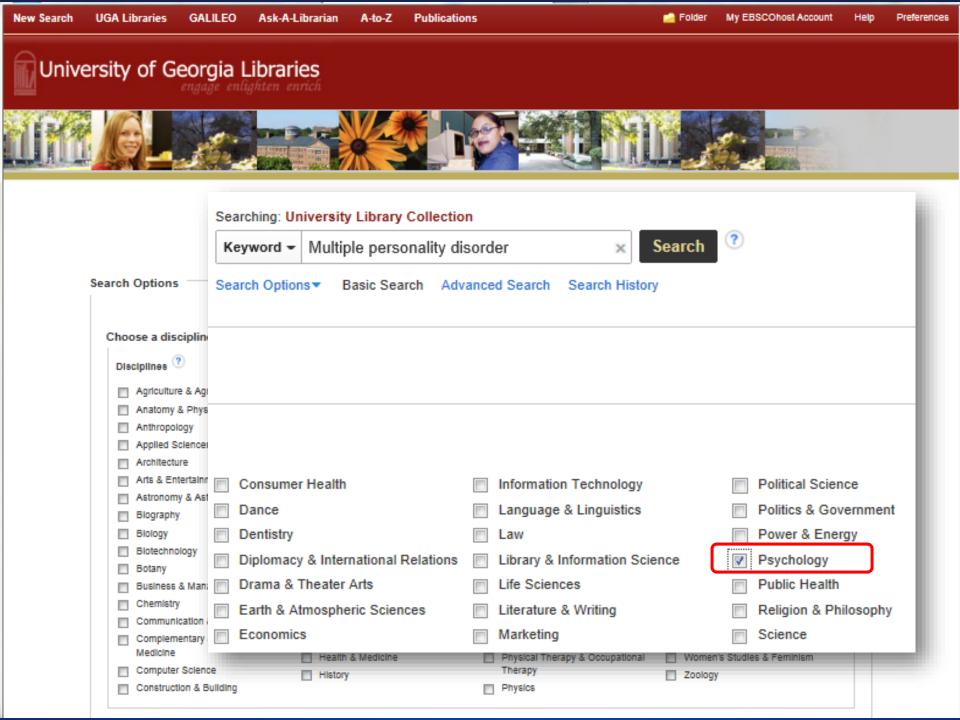
Leveraging subjects and keywords is important.

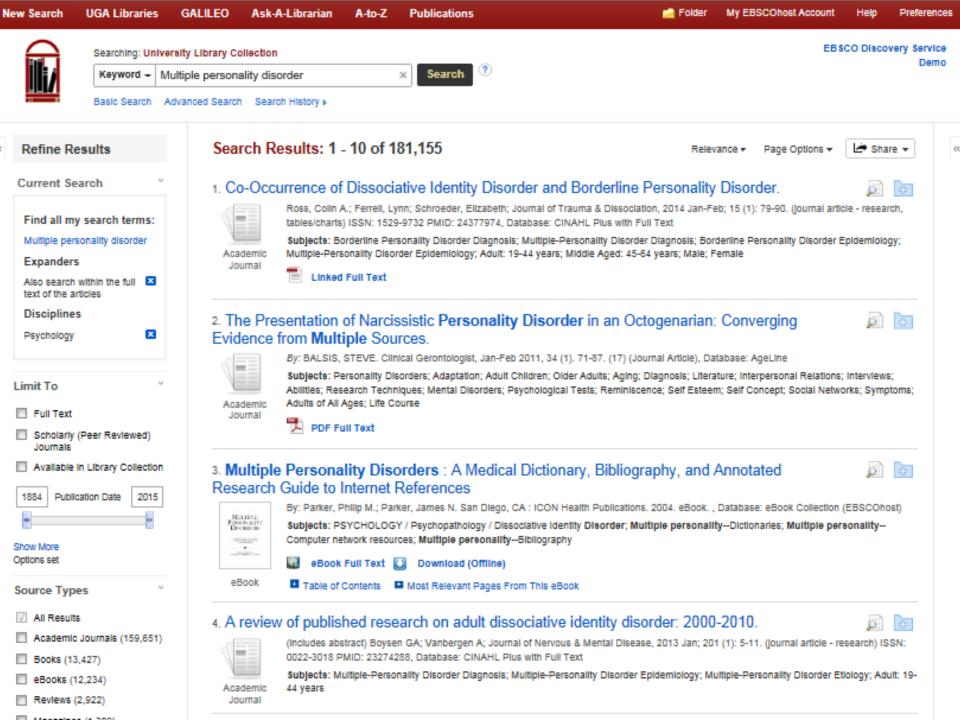




Disciplines and Profiling users...









University Library

Website Library site SEARCH

Library home

Welcome Electronic Library Using the Library Help & contacts Support for my learning Support for my research Special Collections & Archives

Special Collections & Archives



SC&A includes manuscripts and archives, medieval to modern: early and finely printed books, and science fiction collections.

Visit SC&A

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News & events

Possible disruption to Library Opening Hours due to Industrial Action, December 6th & 7th

BMJ: Best Practice now available

More Web of Knowledge databases now available

TRIAL: Caribbean Newspapers, Series 1, 1718-1876

EZproxy problem resolved

More news stories

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Library home

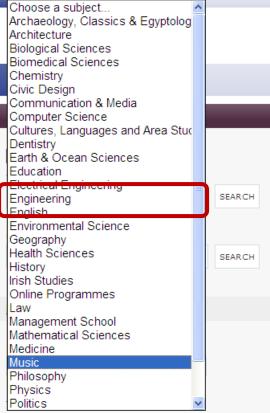
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Special Collections & Archives

Special Collections & Archives



SC&A includes manuscripts and archives, medieval to modern; early and finely printed books, and science fiction collections.

Visit SC&A



ABCDEFGHI]KLMNOPQRSTUVWXYZ#

Quick links



DISCOVER

Website Library site



<u>Catalogue</u>



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BMJ: Best Practice now available

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TRIAL: Caribbean Newspapers, Series 1, 1718-1876

EZproxy problem resolved

More news stories





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More answers...

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DISCOVER: science & engineering

the Library's collections of print & e-resources

Search for Sci / Eng articles, books, etc.

SEARCH

Mechanical

Databases for Engineering

Recommended Aerospace Civil Materials

- Compendex (i) (2)
 Coverage: 1970-current
- Web of Knowledge
 Coverage: 1898-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

Quick links



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Request More Books

Tell us which books you need to help you study. Click below to submit your suggestion.



Campaign to tailor the Library collections to your academic needs





Answers vs results...

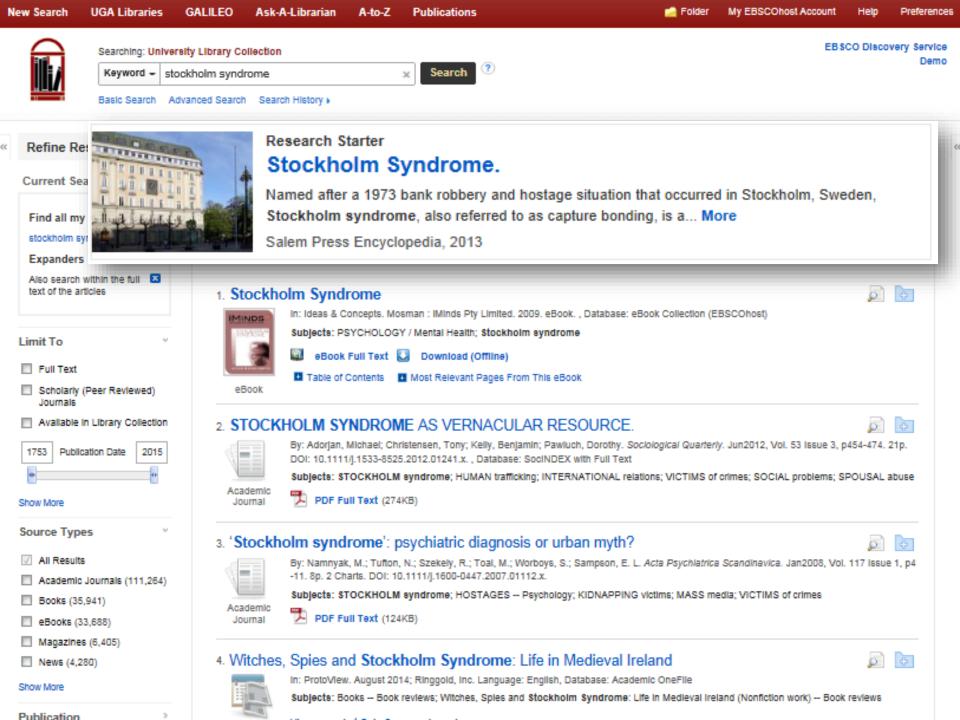


Challenge...

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







Translate



Search Keyword stockholm syndrome Basic Search Advanced Search Search History

Stockholm Syndrome

Last reviewed: September 2013

Office building (orig. residential building) Skravelberget Mindre

9/Norrmalmstorg 2. Built in 1884-86,

architect O Eriksson, constructor I

Hirsch, general contractor Johansson

& Hamarlund, 1920; new facade etc.

(architect T Grut). The building where

Kreditbanken was at Norrmalmstorg,

Stockholm, Sweden, in Kreditbanken

the Norrmalmstorgsdrama took place

◆ Back

Choose Language

Title: Stockholm Syndrome. By: Sundaram, Chandar S., PhD, Salem Press Encyclopedia, September, 2013 E-mall Database: Research Starters Maye Save Cite American Accent Export Create Note 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 Permalink their captors and identify with them, sometimes to the point of adopting the same beliefs. Overview Share

EBSCO Discovery Service

Tools

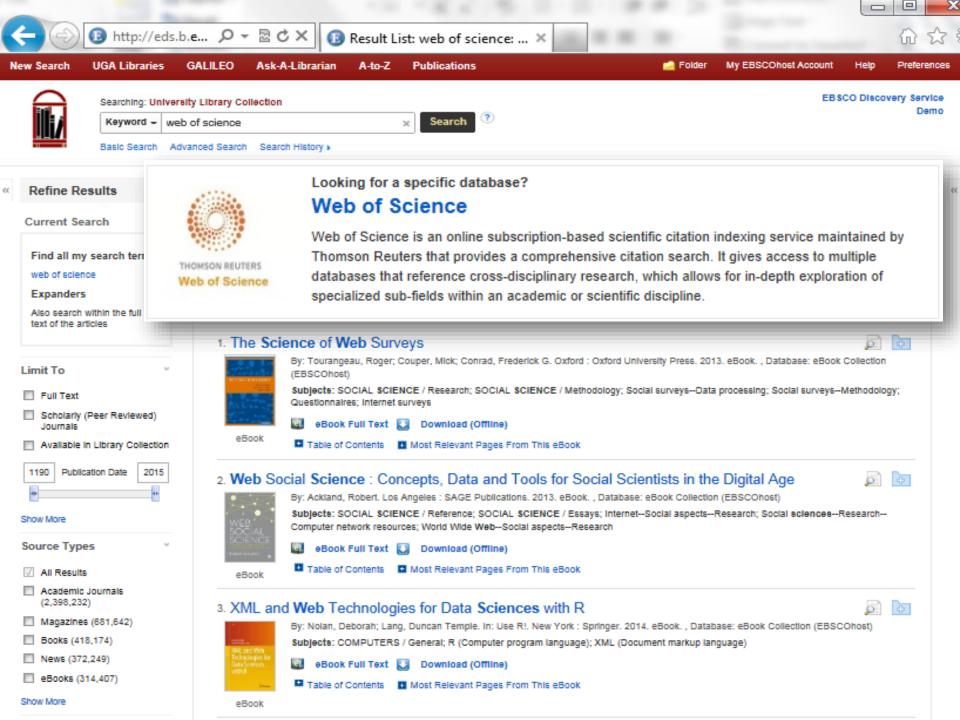
Add to folder





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: Hostages/victims have positive feelings for their captors;
 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 their captors do not harm or abuse them;
 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.



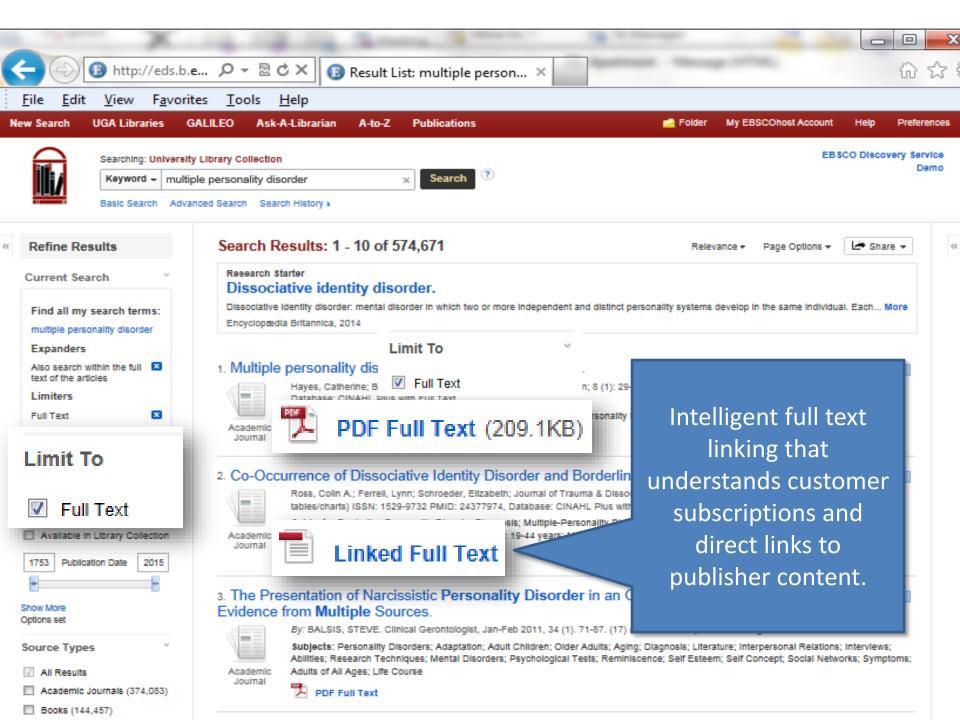
Full text matters...



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.





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 authorsupplied 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-todate 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...

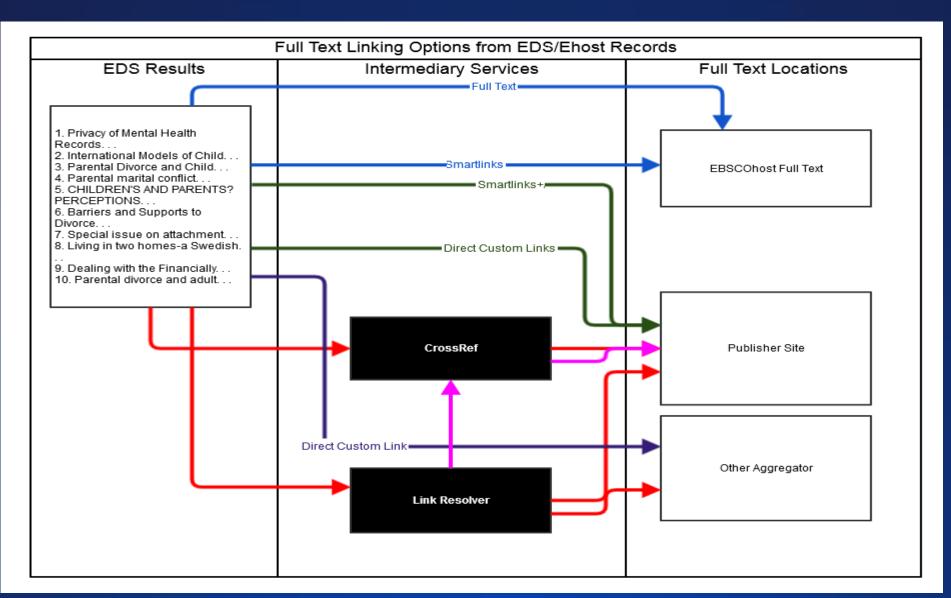


Challenge...

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...



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?

Publisher Report 1 (R4)	Online Service Activity by Month and Title				()		1					
Oliver Pesch												
							, , , , , , , , , , , , , , , , , , , ,					4
Period covered by report:	4											4
2014-01-01 to 2014-12-01												
Date Run:												
9/14/2014	4											
Journal	Publisher	Platform	Journal DOI	Proprietary Identifier	Print ISSN	Online ISSN	User Activity	Reporting Period Total	Jan-2014	Feb-2014	Mar-2014	4 Apr-2014
Total for all journals		EBSCOhost					Full Text Requests	671				
Total for all journals		EBSCOhost					Linkouts - Publisher Site	1282	167	169	157	7 193
Total for all journals		EBSCOhost					Linkouts - Link Resolver	1514	93	165	5 153	3 603
Total for all journals		EBSCOhost					Linkouts - ILL	916	107	7 131	1 111	1 131
Total for all journals		EBSCOhost			1		Linkouts - Doc Del	106	7	7 13	3 15	5 9
Total for all journals		EBSCOhost					Linkouts - Other	52	. 5	5 21	4 7	5 5
Total for all journals		EBSCOhost					Record Views	60	7	7 11	1 5	5 7
Total for all journals	4	EBSCOhost					Result Clicks	653	85	86	14	Co.
Journal 1	Publisher A	EBSCOhost			1111-2222	1111-2232	Full Text Requests	629	82	2 83	3 77	7 95
Journal 1	Publisher A	EBSCOhost			1111-2222	1111-2232	Linkouts - Publisher Site	745	45	81	1 75	5 300
Journal 1	Publisher A	EBSCOhost			1111-2222	1111-2232	Linkouts - Link Resolver	446	5 52	2 64	4 54	4 64
Journal 1	Publisher A	EBSCOhost			1111-2222	1111-2232	Linkouts - ILL	41	. 2	. 5	5 6	3
Journal 1	Publisher A	EBSCOhost			1111-2222	1111-2232	Linkouts - Doc Del	14	1	1 9	9 0	1
Journal 1	Publisher A	EBSCOhost			1111-2222	1111-2232	Linkouts - Other	18	2	4	4 2	1 2
Journal 2	Publisher A	EBSCOhost			1221-2222	1221-2232	Full Text Requests	653	85	86	5 80	0 98
Journal 2	Publisher A	EBSCOhost			1221-2222	1221-2232	Linkouts - Publisher Site	769	48	84	4 78	8 303
Journal 2	Publisher A	EBSCOhost			1221-2222	1221-2232	Linkouts - Link Resolver	470	55	67	7 57	7 67
Journal 2	Publisher A	EBSCOhost			1221-2222	1221-2232	Linkouts - ILL	65	5	5 8	8 9	1
Journal 2	Publisher A	EBSCOhost			1221-2222	1221-2232	Linkouts - Doc Del	38	4	12	1 7	3 4
Journal 2	Publisher A	EBSCOhost			1221-2222	1221-2232	Linkouts - Other	42	5	7	1	4 3

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 to 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

Los Angeles | London | New Delhi Singapore | Washington DC





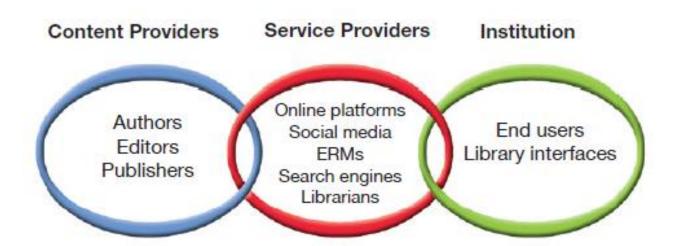
hatter understand the habitual practices

realms of research are not irreconcilable





Scholarly Communication Supply Chain





SAGE





\$SAGE knowledge

methodscases

\$SAGE researchmethods



\$SAGE businessresearcher







Understanding discovery

Market research

Data analysis

- Open web search
- Library search
- Academic / A&I search
- Within the SAGE universe



Academic search – what we do

	Bounce rate	Pages / visit	Visit length
Open web	85%	1	0:40
Library	29%	4	4:88
Academic	26%	6	3:02



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

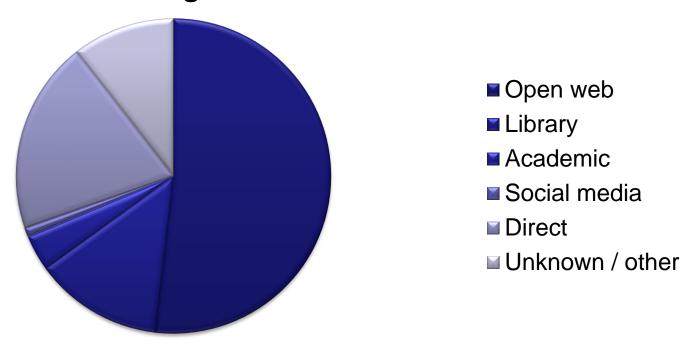
- Product dashboards with SEO metrics
- Development roadmaps with SEO goals
- SEO standards compliance
- Structured mark-up & semantic enrichment
- Strong relations w. search engines
- SEO bi-annual audits
- SEO Q/A testing
- Internal SEO analyst
- Search engine trend watch





Open web search \$SAGE journals

Usage / Traffic Source



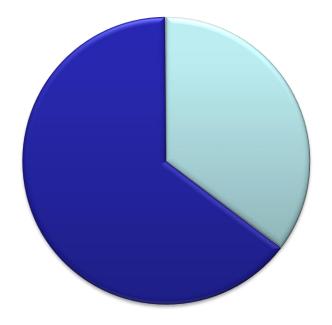


Open web search





Usage / Traffic Source Jan-Jul 2013



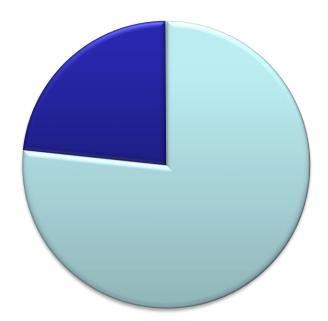
- Open web
- **■** Library



Open web search



Usage / Traffic Source Jan-Jul 2014



- Open web
- **■** Library



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

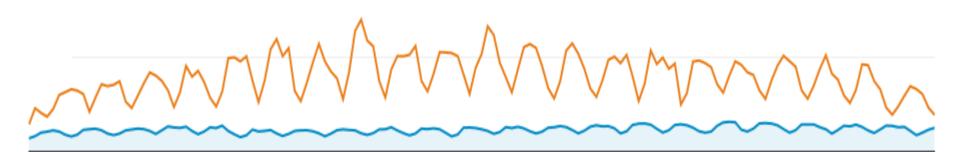




Library search – what we do

Referrals from library sites 2011 / 2014

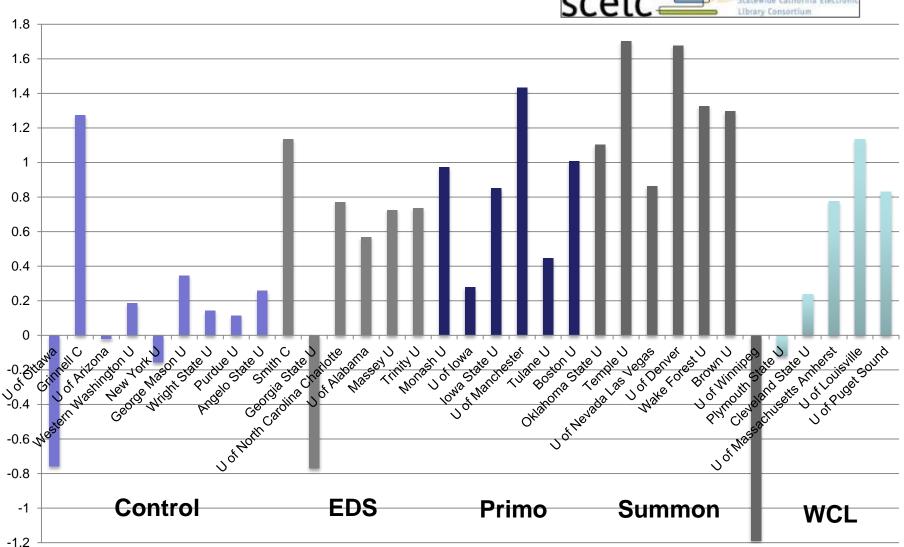
Jan 1, 2011 - May 31, 2011: Sessions
Jan 1, 2014 - May 31, 2014: Sessions





Cross-sector research







Academic / A&I search – what we know

"Power" users





Use case: deep research, building expertise











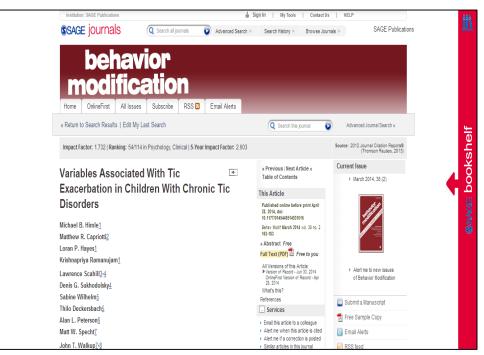
Academic search – what we are doing

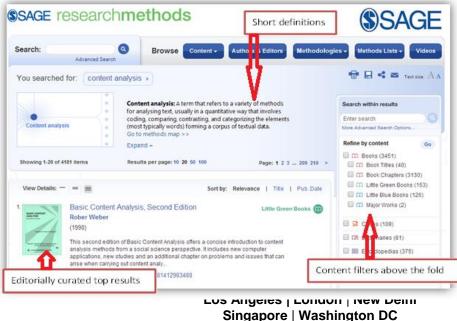
- Product dashboards with targeted metrics
- Development roadmaps with targeted goals
- Standards compliance & leadership inc. encouraging A&I services to cover relevant titles
- Trend watch & analysis
- Google Scholar relations
- Staff development / training



Integrated SAGE product offering

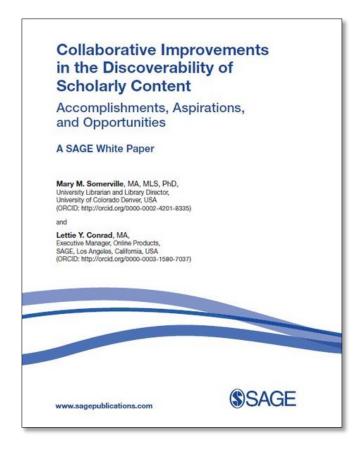
- Cross-product interlinking driven by semantic analysis
- Faceted search through controlled vocabulary tags
- Editorial influence in search results for some products







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Some things we need to focus on....

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





Thanks!

Questions?

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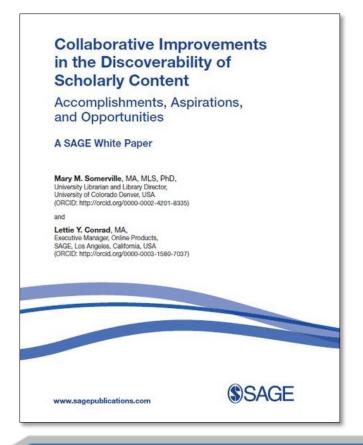


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 Practice <u>www.niso.org/workrooms/kbart</u>
- Open Discovery
 Initiative <u>www.niso.org/workrooms/odi</u>
- Recommended Practice for the Presentation and Identification of E-Journals (PIEJ) www.niso.org/workrooms/piej
- Project COUNTER http://www.projectcounter.org/



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http://www.sagepub.com/repository/binaries/pdf/improvementsindiscoverability.pdf

