Content Working Group Report

2016-2017

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Kathy Varjabedian, Los Alamos National Laboratory, Co-coordinator for ELUNA

Goals

- Ensure that data stored in the knowledge base is of the highest quality by reviewing the KB's quality assurance policies and processes.

- Make suggestions for improvements that ensure customers' permanent influence on the quality of the KB.

- KB/Index NERS voting (new from end 2017)

History

- 2013: SFX Knowledge Base Advisory Board (KBAB), as a result of discussions at the 2012 Zurich IGeLU Conference
  - Only focus on SFX KB

- Spring 2016: Scope extended to Alma CZ, SFX KB, 360 KB and Primo Central and Summon indexes

- Summer 2017: KBAB renamed **Content Working Group** (CWG)
  http://igelu.org/special-interests/content-working-group

Meetings

- **Internal meetings**
  - Apr. 19, Aug. 30, Oct. 11, Nov. 9, Dec. 13, 2016
  - Feb. 14, Mar. 14, Apr. 18, Jun. 13, Jul. 11, Aug. 29, 2017

- **Calls with Ex Libris**
  - Jul. 18, Aug. 15, Nov. 21, Dec. 19, 2016
  - Feb. 27, Apr. 24, Jun. 19, Jul. 26, 2017

- **Face-to-face meetings with Ex Libris**
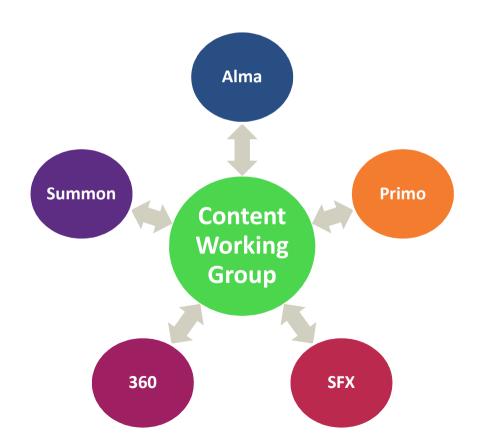 - ELUNA 2016, IGeLU 2016 and ELUNA 2017

Members

- Lauren Ajamie, *University of Notre Dame, USA*
- Molly K. Beisler, *University of Nevada, Reno, USA*
- Xiaotian Chen, *Bradley University, USA*
- Sara Colglazier, *Mount Holyoke College, USA*
- Melissa M. Gustafson, *Indiana State University, USA*
- Johannes Hercher, *Free University of Berlin, Germany*
- Christina Ley Hughes, *Bangor University, United Kingdom*
- Stew MacLehose, *University of New England, USA*
- Stacy Magedanz, *California State University San Bernardino, USA*
- Coleen Neary, *American Military University | American Public University, USA*
- Ulrikke Greve Olufsen, *University of Oslo, Norway*
- Stanislav Orlov, *Mount Saint Vincent University, Canada*
- Alisha L. Quagliana, *University of Texas at Austin, USA*
- François Renaville, *University of Liège, Belgium*
- Kathy Varjabedian, *Los Alamos National Laboratory, USA*
- Chris Vidas, *Ball State University, USA*
- Marie Widigson, *Chalmers University of Technology, Sweden*

Past members
- Stephanie Aken, University of Kentucky, USA (2016-2017)
- Yosef Branse, University of Haifa, Israel (2016-2017)
- Marina Oliver, Texas Tech University, USA, co-coordinator ELUNA (2016)
- Maribeth Manoff, University of Tennessee, USA (2016)

Not on a lost island…

- Content Working Group (CWG) engages in activities, on behalf of the Alma, SFX, 360, Primo Central Index and Summon user communities.
- In contact with the other PWGs (liaison officers)

Alma

Summon

Content Working Group

Primo

360

SFX

Expertise as an admin/manager for…

SFX	Alma	Primo/PCI	360	Summon
✓		✓		
			✓	✓
✓				
✓				
			✓	✓
		✓		
	✓			
			✓	✓
✓	✓	✓		✓
			✓	✓
✓	✓	✓		
✓				
✓			✓	✓
✓	✓	✓		
✓	✓	✓		
			✓	
✓			✓	✓

Achieved

Resource types

- Ex Libris is working a new typology for resource types in Summon & Primo Central
  - Summon: 95 resource types
  - Primo Central: 24 resource types
  - Sometimes different terminology for the same thing
- Feedback from the CWG to Ex Libris

- Also requests from the community:
  - Review content type in Primo is confusing
    http://ideas.exlibrisgroup.com/forums/308176-primo/suggestions/16922665-review-content-type-in-primo-is-confusing
  - Adding 'Issue' as a new resource type in Primo Central
    http://ideas.exlibrisgroup.com/forums/308176-primo/suggestions/9701883-adding-issue-as-a-new-resource-type-in-primo-cen

Achieved

Vendor communication

- Contacting vendors who have not been responsive to Ex Libris's requests for information or content (new collections or updating of existing collections in KBs and indexes). Or contacts with Ex Libris upon request of the vendors.
  - Bibliothek für Bildungsgechichliche Forschung
  - BioMed Central
  - CSIC Free eBooks
  - Classiques Garnier Numérique
  - Factiva
  - Museum Tusculanum Forlag
  - OpMaat
  - Otto Sagner Verlag
  - UNESCO Open Access
  - Westlaw
- Some success, but sometimes no feedback from the vendors (even after 2-3 reminders)
- Some new collections were highly requested by the community (NERS or KB Items)

Achieved

From "KB Items" to "Content" forum

- Mechanisms for suggesting new collections have been incomplete, consisting of a "KB Items" section of Salesforce, and no clear path for suggestions for new contents.
- Not much promoted either by Ex Libris → KB Items still supported?

- Why not going into Idea Exchange?
  - Ex Libris was considering that option…

- **New 'Content' forum in Idea Exchange** (April 2017)
  - Suggesting new collections and data that customers would like to see added to the Discovery Indexes and the KBs
  - Separate workflow from the other forums (20 votes dedicated)
  - The top 35 KB items from Salesforce were migrated into the forum
  - Can also be used by customers to suggest new authority files to be added to the Alma CZ and to request enrichment of CZ bibliographic records for collections
  - Separate from voting cycles in NERS, providing an additional avenue for requests and prioritization

Ongoing

Transparency & communication

1) Sneak previews for Content

- Upcoming content additions
    - For example in order to avoid
        - Creating unnecessary local collections/targets
        - Submitting useless ideas on Idea Exchange

- What Ex Libris is working on
    - Perspectives…
    - Current contacts with vendors for eventual new collections
    - No ETA, just info

Ongoing

Transparency & communication

2) Better information on collection coverage and update frequency

- Summon customers have very few information
  - no way to know if content is or is not indexed in Summon
  - no way to know when content has been updated

> Ex Libris
> - is working on a new visual indication in 360 client center that will **indicate if the content is available in Summon** (planned for Q4 2017).
> - is checking the possibility to present in 360 client the **last update date** of the collections/databases.

- PCI customers have *Update Frequency* announce in the PCI activation widget
  - But no way to check if theory = reality

KEEP CALM AND DO THE SNOOPY DANCE

Ongoing

Transparency & communication

3) Known KB Issue List

- Known (major) problems with access to collections that affect multiple products (or not)
- To avoid multiple testing by several customers, sending similar emails to the discussion lists
- Pro-active communication from Ex Libris

GET EXCITED IT'S ALMOST HERE

→ Ex Libris is working on a **Knowledge Center Content Corner**!

Ongoing

Open Access indicators

- "Open Access Filter" added to Summon some months ago
  https://knowledge.exlibrisgroup.com/Summon/Product_Documentation/Summon%3A_Open_Access_Filter

- Planned for Primo Central Index

- Questions from the CWG and SFX/Alma/PCI/Summon customers submitted to Ex Libris for discussion

Ongoing

ORCID IDs for Summon/PCI

- Planned on Ex Libris's roadmap

- Libraries are starting integrating ORCID IDs from their institutional repository to their discovery (see ELUNA and IGeLU Show&Tell "Integrating ORCID identifiers in an institutional repository" at https://www.youtube.com/watch?v=OFNKcs1RQ1Q).

- It makes really sense that remote records from PCI/Summon and local library records can be processed **in a unified and coherent way** in the discovery tools.

- Already discussed the Primo list, SF cases created about this.

- Questions from the CWG and PCI/Summon customers submitted to Ex Libris for discussion

Ongoing

Content contributions & interconnections between KBs

- Content contributions in Alma (bibliographic updates, new records, new collections…) are <u>not passed</u> to SFX or 360
  - Local **collections** contributed by the customer to Alma CZ (and approved and added by Ex Libris to the CZ) are not automatically added to the SFX KB (neither to the 360 KB) for other customers potentially interested.
  - Locally created **portfolios** in Alma and contributed to Alma CZ (automatically added to Alma CZ) are not added to the SFX KB (neither to the 360 KB).
  - **Updated/corrected records** in Alma CZ are not reflected to the SFX KB (neither to the 360 KB), even with some delay (for example: adding a missing author, a missing publication year, correcting a language code, etc.).

    Ex Libris:
    - Alma is based on SFX KB but updates are only one way from SFX to Alma (not bi-directional).
    - No plan to carry over contributed content from Alma CZ to SFX KB/360 KB

- The CWG would like to discuss this further in the future.

Ongoing

Content contributions & interconnections between KBs

- **Update of contributed collections**?
  - Currently: Collections contributed by the community to the Community Zone are not updated by Ex Libris.

> Ability to updated contributed collection in Alma is planned to be released in November 2017.

Ongoing

Many new SFX/Alma CKB collections...?

- Many new collections recently added that overlap with existing collections, with less specific coverage statements and linking levels

- Questions submitted to Ex Libris for discussion

Ongoing

Quality of new Primo Central Index collections

- PCI recently enriched by very interesting collections!
- Some concerns
  - important metadata missing (eg. patent number);
  - linking issues (broken links, no link)
  - delivery issues (no full text or full with embargo while announced as free)

- Questions from the CWG and PCI customers submitted to Ex Libris for discussion

Perspectives for 2017-2018

- **NERS voting process**
  - Newly in charge of voting ballots for new content in KBs and indexes
  - Stay tuned...

- **Internal training sessions** so that:
  - our Alma/SFX/PCI experts better understand how 360/Intota/Summon work
  - our 360/Intota/Summon experts better understand how Alma/SFX/PCI work

- **Suggestions?**
  - Content-WG@exlibrisusers.org
  - Always create a SF case if you encounter a content/linking issue!

Thanks…

- To Ex Libris

- To IGeLU and ELUNA SCs and PWGs

- To institutions that contacted us for some issues:
  - Harvard University, BCU Lausanne, University of New South Wales, Paris Sciences et Lettres

KEEP CALM AND
THANK YOU FOR
YOUR ATTENTION

ANY QUESTIONS ?

NO? GREAT! BYE

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