



# Content Working Group Business Meeting

François Renaville, IGeLU WG Coordinator  
Ulrikke Greve Olufsen, Incoming IGeLU WG Coordinator  
Kathy Varjabedian, ELUNA WG Chair



## **Abstract**

This session is open to all conference attendees interested in KBs (Alma, SFX, 360) and indexes (Primo Central, Summon) and will include a report on the activities in 2018-2019 of the Content Working Group and an open discussion about what the CWG should focus on for 2019-2020.



## What is the Content Working Group?

- A joint ELUNA/IGeLU group that supports the development, management and quality of the knowledge bases and discovery indexes used in Alma, SFX, 360, Primo and Summon.
- Impact of the future Central Discovery Index (CDI)?
- Meetings
  - Internal call for all members on the 2nd Tuesday of the month
  - Call with Ex Libris management on the 3rd Monday of the month



## Content Working Group members

- Molly K. Beisler, University of Nevada, Reno, USA, [NERS Co-coordinator](#)
- Xiaotian Chen, Bradley University, USA, [SFX WG liaison](#)
- **Christel Coquilleau, University of Lausanne, Switzerland**
- **Eleanor Craig, University of Sussex, UK**
- **Katie Dunn, University of Wisconsin–Madison Law Library, USA, [Alma Law Library SIG Liaison](#)**
- **Richard R. Guajardo, University of Houston, USA, [ELUNA Primo WG liaison](#)**
- Melissa M. Gustafson, Indiana State University, USA
- **Brian Kern, Allegheny College, USA, [ELUNA Summon WG liaison](#)**
- Stew MacLehose, University of New England, USA , [NERS Co-coordinator](#)
- Stacy Magedanz, California State University San Bernardino, USA, [Alma CZMG Liaison](#)
- Ulrikke Greve Olufsen, University of Oslo, Norway, [NERS Co-coordinator](#), Incoming Co-coordinator IGeLU
- **Karin Perols, Karolinska Institutet, Sweden**
- **Charlie Remy, University of Tennessee at Chattanooga, USA**
- François Renaville, University of Liège, Belgium, Co-coordinator IGeLU
- **Zorian M. Sasyk, Metropolitan State University-St Paul, USA**
- Kathy Varjabedian, Los Alamos National Laboratory, USA, Co-coordinator ELUNA



## Past members

Some members/liaisons have left the CWG during the last 12 months:

- Lauren Ajamie, University of Notre Dame, USA, IGeLU Primo WG liaison
- Jennifer Eustis, University of Massachusetts, USA, ELUNA Primo WG liaison
- Ann Fath, The Getty Research Institute, USA, Alma CZMG liaison
- Alexander Jerabek, Université du Québec à Montréal, Canada, ELUNA SC Liaison
- Johannes Hercher, Free University of Berlin, Germany
- Christina Ley Hughes, Bangor University, United Kingdom
- Coleen Neary, American Military University | American Public University, USA
- Stanislav Orlov, Mount Saint Vincent University, Canada
- Nicole Trujillo, University of Colorado Boulder, USA, ELUNA Summon/360 WG Liaison
- Chris Vidas, Ball State University, USA



## Main Activities / Topics

- NERS: voting for new collections
- Documenting and reporting issues with collections
- Responding to Ex Libris requests for feedback
- Transparency regarding collection additions, updates and upcoming changes
- ORCIDs in discovery indexes
- Provider Zone
- Central Discovery Index
- Survey: Dealing with Content issues



## NERS: voting for new collections

- Separate NERS voting for content to highlight content missing from Indexes/Knowledge bases - and to boost regional resources
- Frequency
  - 2018: Twice
  - 2019: canceled (due to CDI)
  - 2020: ?
- Voting process:
  - Each ELUNA or IGeLU institution can give 1 vote per content request
  - One request per collection - indicate whether requesting for KB, Discovery, or both
- Agreement with ExLibris: they will work on the top 10 resources
  - Depends on the responsiveness of the data provider
  - If vendors are not responsive, then the 11th, 12th, etc. most successful resources are taken into consideration



## **NERS: regional resource boosting**

- At each voting cycle, 4 regional resources are boosted
  - This guarantees that regional collections will be pushed up and be part of the top 10
- Regional Resource groups will be highlighted on a rotating basis
- In order to get Regional Resources added, the community will have to submit requests





## NERS or Idea Exchange?

- Use both!
- Is it worth creating a NERS request that already exists in IE Content forum?
  - Ideas with 'Planned' status: no need to submit a NERS request
  - Ideas with 'Under review' status or no status: using NERS can push up the requested collection
- Questions/Remarks about NERS voting:
  - Molly K. Beisler, NERS Co-coordinator, <abeisler@unr.edu>
  - Ulrikke Greve Olufsen, NERS Co-coordinator, Incoming Co-coordinator IGeLU, <u.g.olufsen@ub.uio.no>
  - Stew MacLehose, NERS Co-coordinator, <smaclehose@une.edu>
  - Kathy Varjabedian, Co-coordinator ELUNA, <kv@lanl.gov>



## NERS 2018 H1 Content Ballot

Top 10 Requests (regional: Danish, English (ANZREG), German, Spanish)

- PsycINFO
- MathSciNet
- American Chemical Society
- HeinOnline
- Mediearkivet & Atekst
- Lovdata
- Cristin
- CCH Online
- Digitale Bibliothek des Münchener Digitalisierungszentrum
- eBooks UPC



## NERS 2018 H2 Content Ballot

### Top 10 Requests (regional: Chinese, Hebrew, Finnish, Polish)

- ATLA Religion Database
- Embase
- Centre for European Policy Studies publications
- Joanna Briggs Institute Database
- Juridika (Norwegian language)
- Philosopher's Index
- Social Science Research Network (SSRN)
- American Physical Society (APS)
- China Knowledge Resource Integrated Database (Chinese language)
- China Journal Net (CNKI) (Chinese language)



## **NERS 2018 status: Completed**

- Times Digital Archive 1785-2010



## **NERS 2018 status:**

### **In the process of being added to KBs and/or indexes**

- MathSciNet (starting with books in the KBs, index to follow)
- American Chemical Society
- Digitale Bibliothek des Münchener Digitalisierungszentrum
- Juridika (starting with the KBs, index should follow if provider can proceed to the necessary changes)



## **NERS 2018 status: In the process of legal agreement**

- Royal Society of Chemistry ebooks
- The Cochrane Library
- Humanities Digital Library



## **NERS 2018 status: Abstracting and indexing databases**

Ex Libris has been awaiting the analysis of their pilot with CABI before approaching other A&I providers that were in the top 10 vote winners. These databases include:

- PsycINFO
- Cristin
- El Compendex



## **NERS 2018 status: In discussion/being investigated**

- American Physical Society (APS)
- ATLA Religion Database
- China Journal Net (CNKI)
- China Knowledge Resource Integrated Database
- Philosopher's Index
- Social Science Research Network (SSRN)
- Westlaw International





## **NERS 2018 status:**

### **Unable to negotiate indexing agreement**

- Embase
- Centre for European Policy Studies publications



## ORCID<sup>®</sup> in discovery indexes

- ORCID: researcher ID, for disambiguation and tracking researcher output throughout career. Used on publisher websites, institutional repositories, databases and in crossref DOI metadata
- Primo and Summon – some vendors are now including, e.g. ERIC, Scopus, arXiv
- Some ORCID numbers can be found with search; not displayed; not paired with the individual author
- Customers would like ORCID data to be available in display, facets, search, and PNX adddata, for use in display, facets, search, export. They would be interested in replicating ORCID config for local records to blend into discovery index (> Primo and Summon WGs)



## Collections slow to be added/updated

- Continuing problem for both KB and discovery. Especially occurs with:
  - New titles added to existing collections (e.g. Oxford Scholarship Online, Springerlink, Cambridge University Press ebooks)
  - Collection packages that change yearly - ebooks sold in annual packages
  - Collections from vendors who don't provide data regularly
- “Solutions”:
  - Submit Cases + Talk to vendors!
  - Escalation
  - + contacting the Content WG



## Central Discovery Index

Unified index which will support both Summon and Primo:

- Combines Summon and Primo Central indexes
- Single activation for KB (Alma CZ) and discovery

### The Ex Libris Central Discovery Index (CDI) – An Overview

[https://knowledge.exlibrisgroup.com/Primo/Content\\_Corner/Product\\_Documentation/Central\\_Discovery\\_Index/The\\_Ex\\_Libris\\_Central\\_Discovery\\_Index\\_\(CDI\)\\_%E2%80%93\\_An\\_Overview](https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Product_Documentation/Central_Discovery_Index/The_Ex_Libris_Central_Discovery_Index_(CDI)_%E2%80%93_An_Overview)

Ex Libris requested the CWG's help for two aspects: resource types and activation. Subgroups created with members of the CWG and other experienced volunteers.

Session at IGeLU 2019:

**CDI – Ex Libris' New Central Discovery Index**

Wed Aug 28 2019, 4:00pm–5:00pm, Max Atria Garnet 216



## Central Discovery Index: Resource Types

In the CDI,

- Summon will continue to use its list of content types
- Primo will use a shorter list, mapped from the Summon list

Ex Libris created a spreadsheet of Summon content types and suggested Primo resource types for mapping.

Review, discussion, comparison of experiences with how resource types are used.

More granularity for Primo customers, but not too many resource types either.



## Central Discovery Index: Collection Activation

Ex Libris would like to provide a default set of resources that could be optionally activated in CDI (for institutions who are not sure what to activate).

Discussed:

- Which providers/collections should be included; which collections are activated by high percentage of customers
- Reliability of data
- Merged records – link in record vs. link resolver?
- Open access collections – free for search and delivery
- ...

Some aspects still under investigation



## PCI Open Access Database Evaluation Project

- Not a project of the CWG.
- Initiative from Greg Bem [Greg.Bem@lwtech.edu](mailto:Greg.Bem@lwtech.edu) and Sue Wozniak [Sue.Wozniak@lwtech.edu](mailto:Sue.Wozniak@lwtech.edu) (Lake Washington Institute Of Technology, USA)
- Aim: to review the “OA”-classed database collections available via PCI.
- Reason: Libraries struggling with small budgets have sought after high quality and truly open collections to supplement those few proprietary subscriptions they can afford. First review in summer 2017.
- Review in summer 2019: 19 librarians from 16 institutions (Asia, Europe, and North America [two members of the CWG]):
  - focus on the databases themselves (not in PCI)
  - peer-reviewed, full OA, languages, license info, Accessibility
  - Results: <https://sites.google.com/view/wactclc/databases>
- Source of inspiration for CDI?



## Survey: Dealing with Content issues

Survey:

- how content managers deal with Content issues and how satisfied they are with the Support and work with Salesforce for Content.
- looking for feedback in the form of personal (not institutional) opinions from content managers
- for anyone involved in 360 KB, Alma CZ, SFX KB, Primo Central Index or Summon index management
- multiple people from within the same organization are invited to share their point of view.
- ran from June 18 to July 15, 2019





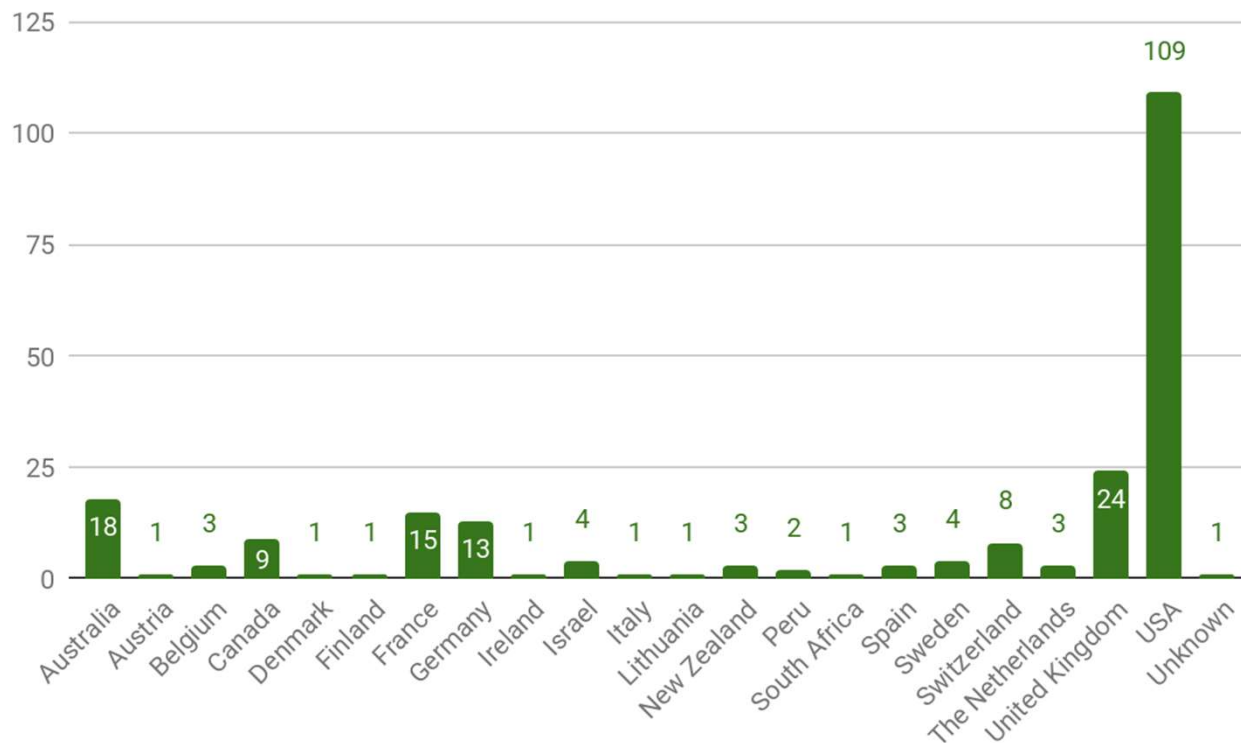
## Survey: Dealing with Content issues

Focus on:

1. Handling of Salesforce Content cases
  2. Escalation Process
  3. Reporting Content issues to Ex Libris
  4. Publishing to All
- 
- Lots of comments!
  - Only partial results presented here, still under analysis
  - With the help of Brian Kern and Stew MacLehose

## Survey: Dealing with Content issues

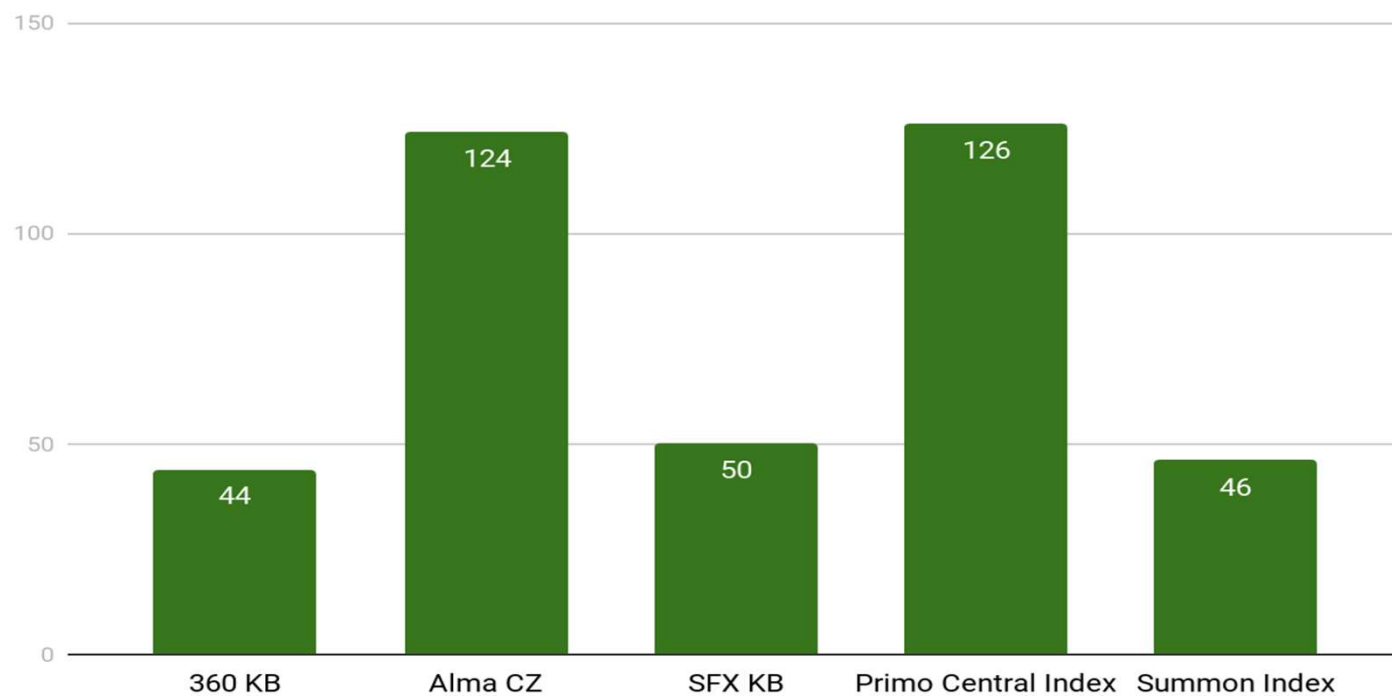
226 replies from 153 identified institutions from 21 identified counties





## Products

Using the following KBs and indexes





## Handling of Salesforce Content cases

- 44% of respondents were **satisfied or somewhat satisfied** with how their **support case** was handled in general.
- 45% of respondents **always or usually** filled in the **post closing survey** whether satisfied or not
- 29% of respondents were **satisfied or somewhat satisfied** with **how long** it took for their support case to be resolved
- 43% of respondents noticed a **different experience** between **KB and index cases**



## Handling of Salesforce Content cases

Themes from **strengths** of how cases are handled:

- cases are acknowledged quickly when opened
- cases eventually resolved (not quickly)
- professional and knowledgeable staff
- quick resolutions to easy problems

Themes from **weaknesses** of how cases are handled:

- long resolution time
- communication (both status and understanding of case)
- passing of cases from one tech to another and having to re-explain the problem,
- lack of understanding of how libraries use the products
- complex cases take particularly long to resolve
- only fixing a specific problem when that was indicative of a larger problem



## **Publish to All**

- Nearly half of survey respondents did not know if their content cases were published. Only 26% surveyed actually publish their cases.
- Less than 13% of those surveyed often search Salesforce to find a case that might be similar to theirs. Almost 60% rarely or never search Salesforce.
- Only 53% of respondents would like to see more content cases published in Salesforce.
- Many didn't know the functionality existed: "It was barely mentioned during our Implementation and Switch to Support, even though it is a vital resource for the community which should be encouraged."



## **Other Content related sessions at IGeLU 2019**

**Content Panel Discussion**, with customers and Ex Libris representatives

Wed Aug 28 2019, 2:30pm–3:30pm, A Max Atria Garnet 213/215

**CDI – Ex Libris’ New Central Discovery Index**, by Christine Stohn

Wed Aug 28 2019, 4:00pm–5:00pm, Max Atria Garnet 216

**The Alma Provider Zone: Content Made EasyPZ**, by Dana Moshkovits and Rael Elstein

Thu Aug 29 2019, 10:00am–11:00am, Max Atria Garnet 212

**All Aboard! How All Roads Lead to Content**, by Judith Fraenkel and Rael Elstein

Thu Aug 29 2019, 11:30am–12:30pm, Max Atria Garnet 216



Topics to investigate?

Send questions, comments, suggestions to

[Content-WG@exlibrisusers.org](mailto:Content-WG@exlibrisusers.org)

Thank you!