# Can they scale?

Library discovery tools and new forms of scholarly communications, especially open access:) Image source: http://theskimonster.com/files/theskimonster/ckfinder/images/keystone-colorado-trail-map.jpeg

## A brief history of discovery



## Library.org c. 1999

- ARL-OCLC Strategic Issues Forum
  - "...the need within the academic community for a scholars portal is high..."
  - "...the place to start for anyone seeking academically sound information."



Image source: http://en.wikipedia.org/wiki/IBook

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Association of Research Libraries (ARL®) http://old.arl.org/resources/pubs/portals/report-may-01.shtml

Publications, Reports, Presentations

Portal Applications in Research Libraries

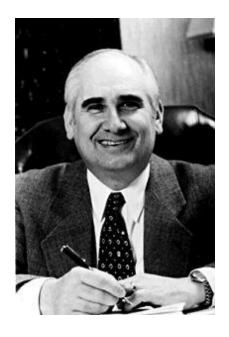
**ARL Scholars Portal Working Group Report May 2001** 

### User Scenario for the ARL Scholars Portal "Single Search" Option

A student is at her workstation at home on a holiday, and the library is closed. She logs on through her ISP and, since library orientation included information about the Scholars Portal, she already has the bullet/logo for it added to her own start page. She clicks into the SP search page and chooses the "single search" option, and types in a few keywords for her topic. (She could also have chosen a "restricted search" option. and limited it to full-text

## The case for a scholar's portal

- "There is also no doubt that today represents a fleeting moment of opportunity to engage the effort. If the research library community accepts the challenge of and succeeds in creating the scholars portal, it will put a tool of immense value in the hands of the academic community."
  - Campbell, J. D. (2001). The case for a scholars portal to the web: A white paper. Portal: Libraries and the Academy, 1(1), 15-21. doi:10.1353/pla.2001.0002



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Google Plans New Servi and Scholars By JOHN MARKOFF Published: November 18, 2004	ce for Scientists						
<b>S</b> AN FRANCISCO, Nov. 17 - <u>Google Inc.</u> plans to announce on Thursday that it is adding a new search service aimed at scientists and academic researchers.	ARTICLE TOOLS E-Mail This Article Printer-Friendly Format Most E-Mailed Articles Reprints & Permissions			D			
Google Scholar, which was scheduled to go online Wednesday evening at scholar.google.com, is a result of the company's collaboration with a number of scientific and academic publishers and is intended as a first stop for researchers looking for scholarly literature like peer-reviewed papers, books, abstracts and technical reports.	MARKETS Stoxbox	SAVE ONCE. READ ANYWHERE. For registered users only.	The New York Register fo				

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### I don't want any trouble here...

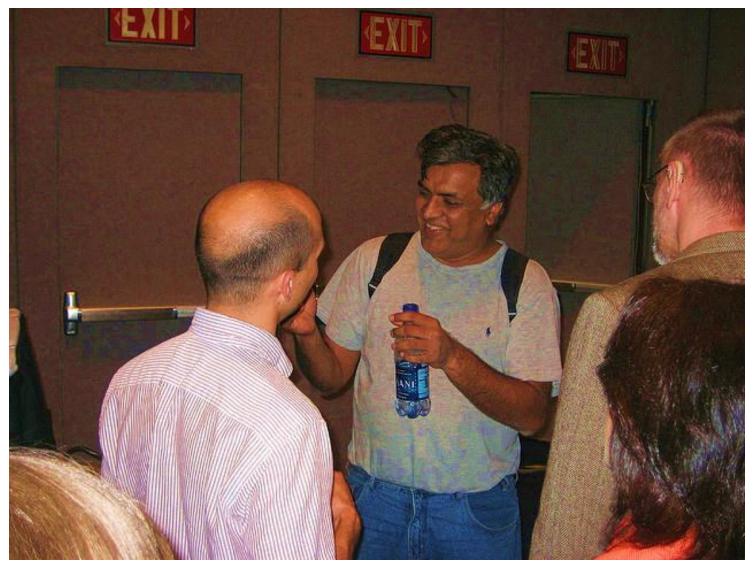


Image source: http://farm1.staticflickr.com/247/515009764\_f59fc4e1e2\_s.jpg

### Scholars portal update 2004

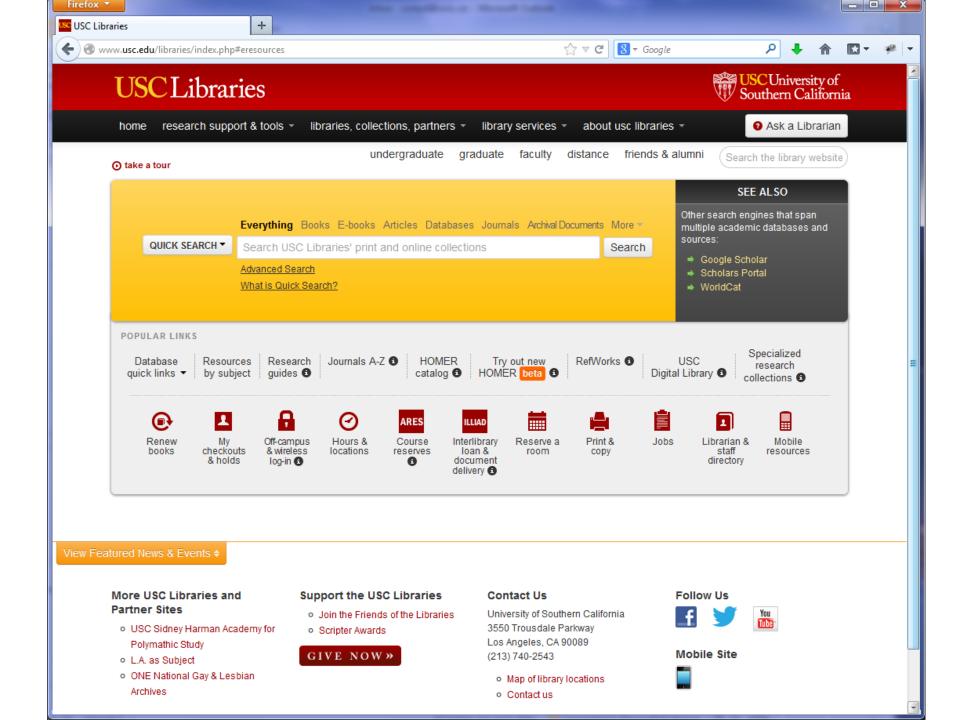
- "Although the three-year project is in its second year, progress has been very slow at USC. Some problems are common to all participants, such as delays in the establishment of the administrative project structure and the vendor's software development, which is a year behind schedule."
  - Afifis, M. (2004). PORTALS IN LIBRARIES: The scholars portal project: The USC perspective. Bulletin of the American Society for Information Science and Technology, 31(1), 18.

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	Your source for virtually anything!						
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	<ul> <li>Free Music Library</li> <li>Law Library</li> <li>Local Library</li> </ul>	Perfume Tanning Lotion Womens Apparel Cosmetic Surgery Mens Apparel	Disability Insurance Life Insurance Home Insurance Dental Insurance Travel Insurance	Firewall Register a Domain Domain Hosting Computer Games Printers			
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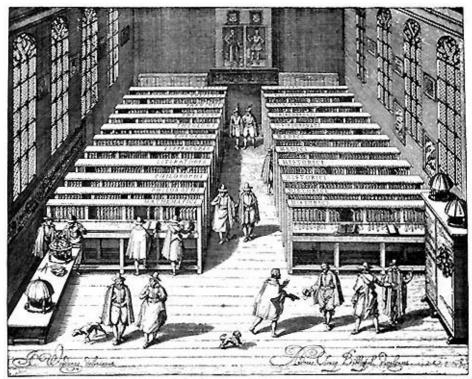
- "...the emergence of Google Scholar demonstrates that creating a centralized search service of library-oriented scholarly resources may be more attainable than previously expected."
  - Breeding, M. (2005). Plotting a new course for metasearch. Computers in libraries.



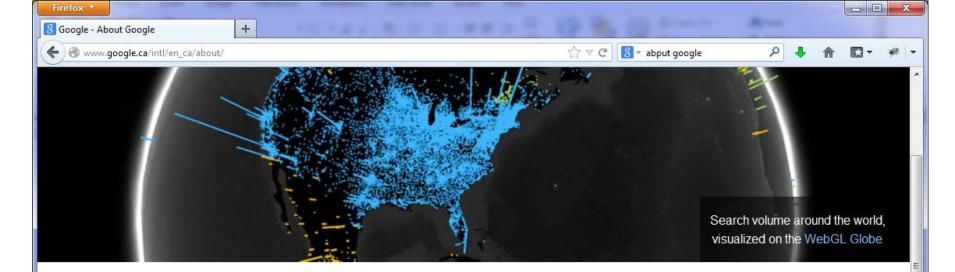
Image source: http://www.librarytechnology.org/images/breeding-2003-full.jpg

### Documents vs. users

- "The bibliographic paradigm is based on certainty and order, where users' problems are characterized by uncertainty and confusion."
  - Kuhlthau, C. C. (1991). Inside the search process: Information seeking from the user's perspective. Journal of the American Society for Information Science, 42(5).



Interior of the Library of the University of Leyden, from a print by Jan Cornelius Woudanus, dated 1610



### Google's mission is to organize the world's information and make it universally accessible and useful.

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Ten things we know to be true

### #1: Focus on the user and all else will follow.

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#### Sept. 17, 2013, 1:39 p.m.

"In every walk with nature one receives far more than he seeks." Trek Mt. Fuji: http://goo.gl/hnbeXq Read more ...

Sept. 16, 2013, 1:35 p.m.

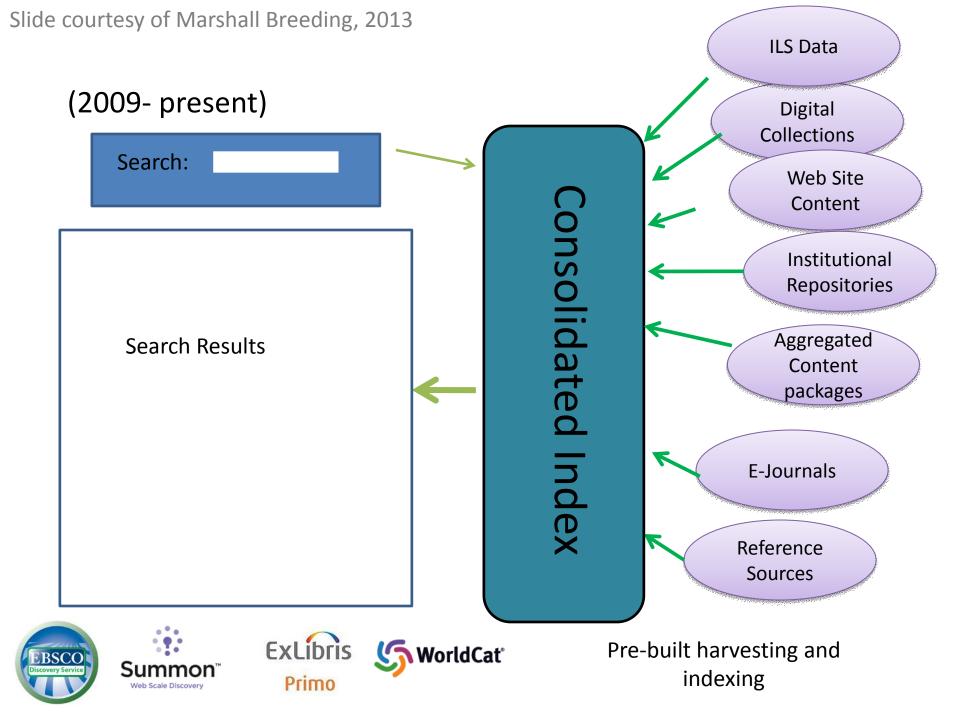
Holy Heartthrob Batman! Rumors of Justin Bieber as the new Robin are trending on

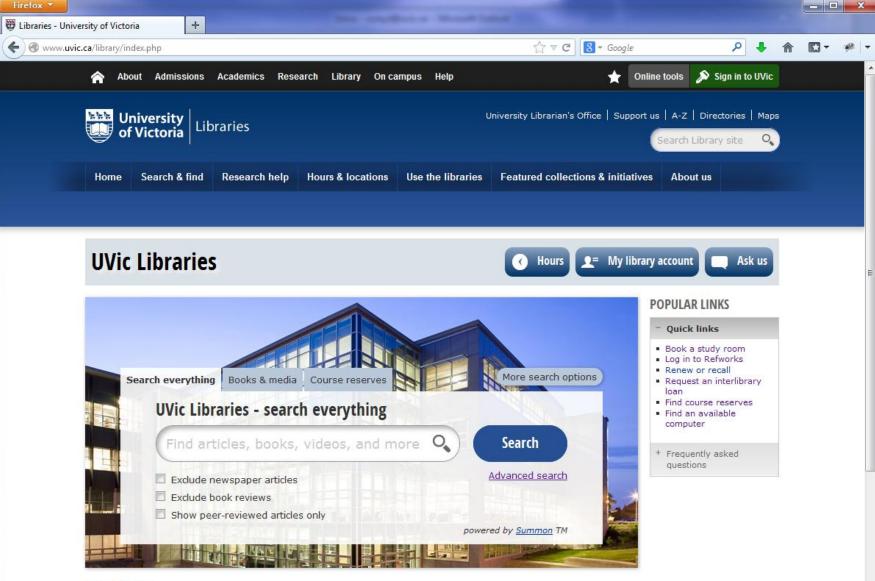
### **Discovery products total installed 2012**

Summon Web-Scale Discovery Interface	504
WorldCat Local	1683
Primo	1151

### \*No data available for EBSCO Discovery Service (EDS)

Data source: http://ezproxy.library.uvic.ca/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=a9h&AN=86373836&site=ehost-live&scope=site





### Spotlight

Highlights from our collections, services, spaces and events.



### Shakespeare

Starting on Sept. 10 check out Shakespeare Onstage-Offstage—a six week community event celebrating the Bard.

### Medieval manuscripts

There are the set of t

 "Another one of my colleagues finds Summon a woefully inadequate search tool, and notes that the [new] site practically gives Summon a monopoly over all kinds of search. In other words, Summon is now the default search, but more than that, it's pretty much the only one."

Anonymous English faculty member

## **US Faculty Survey 2012**



### **Discovery: Starting Point**

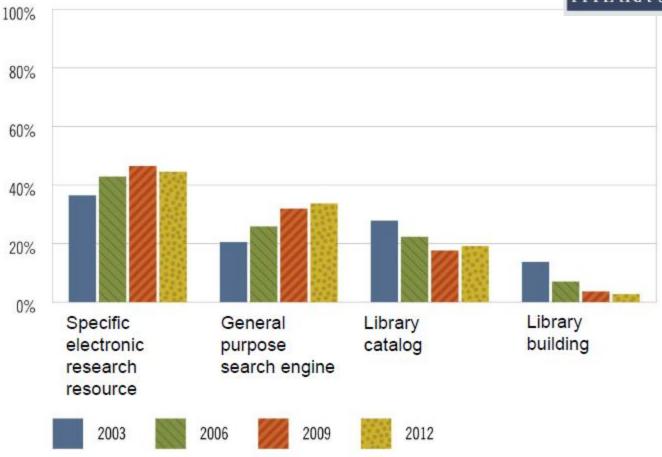
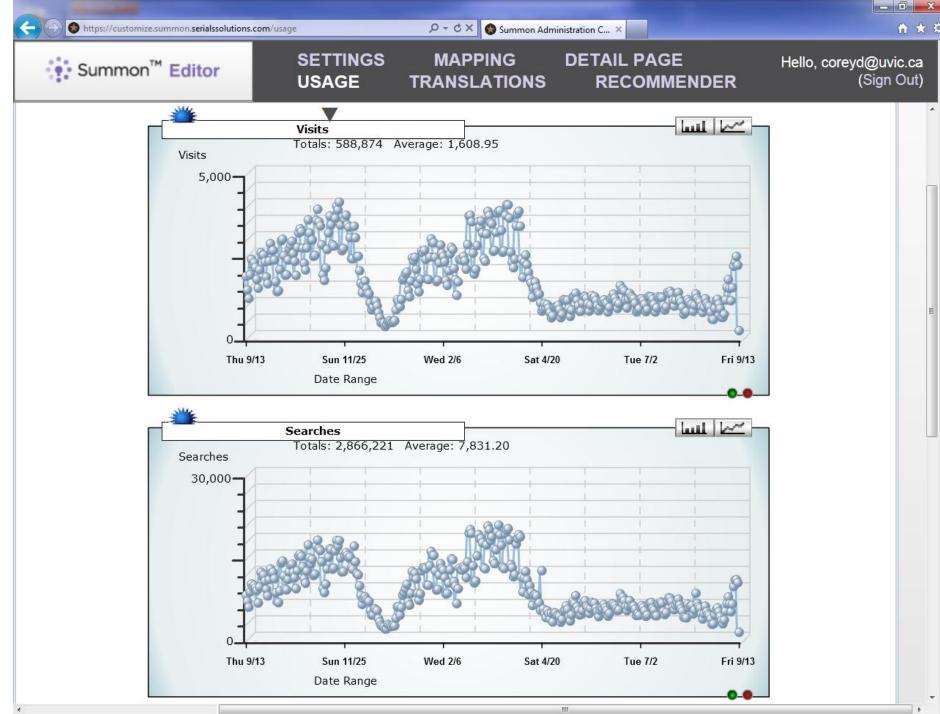


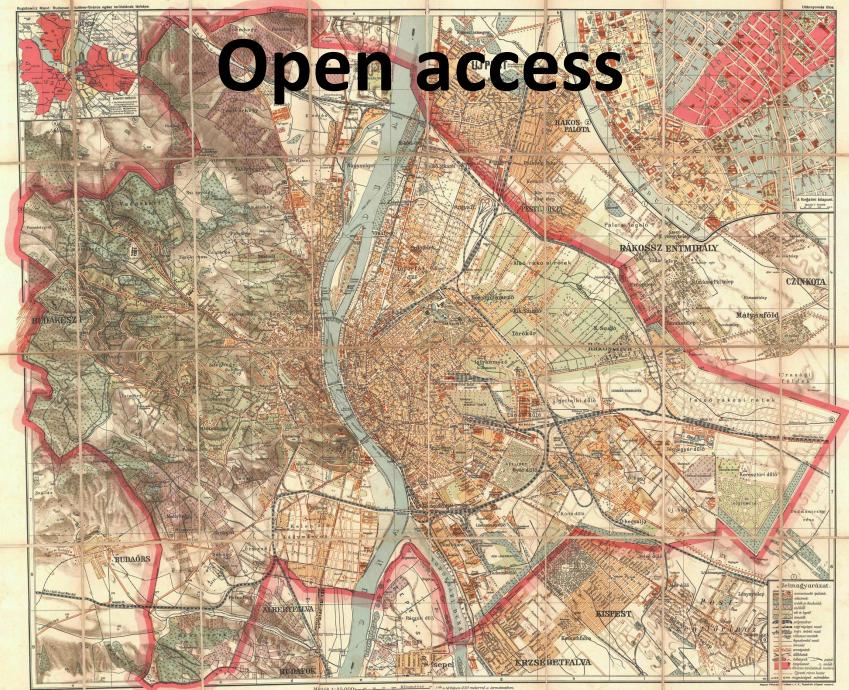
Image source: http://www.sr.ithaka.org/research-publications/us-faculty-survey-2012

## US Faculty Survey 2012



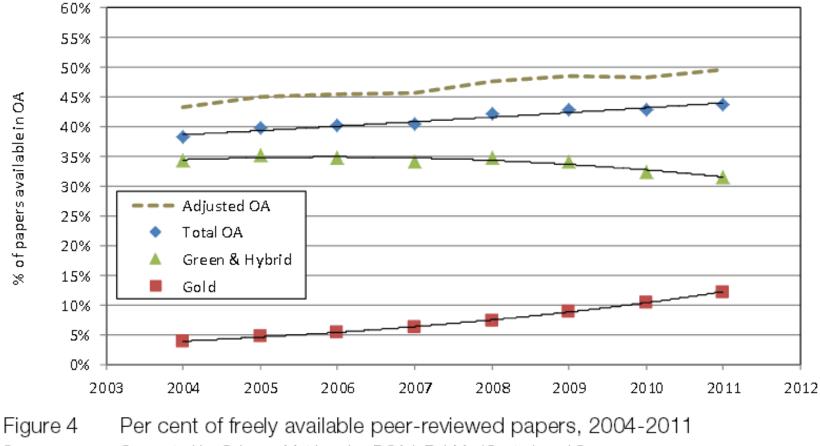
- "The perceived decline in the role of the library catalog noted in previous cycles of this survey has been arrested and even modestly reversed, driven perhaps to some degree by significant strategic shifts in library discovery tools and services."
  - Housewright, R., Schonfeld, R. C., & Wulfson, K. (2013). Ithaka S+ R US Faculty Survey 2012. http://www.sr.ithaka.org/research-publications/us-faculty-survey-2012





## **Inevitability of Open Access?**

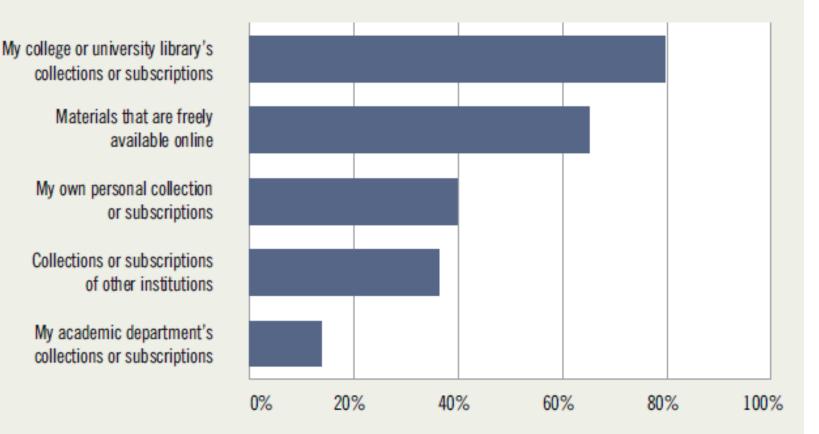
• Information wants to be free...



## Faculty and Open Access

#### FIGURE 17

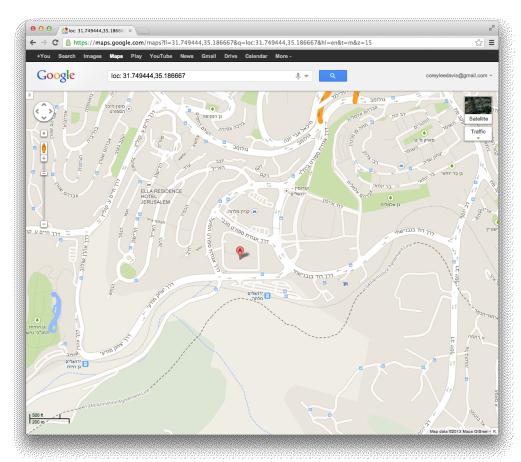
"When you think about the journal articles and scholarly monographs that you routinely use – for research as well as for teaching – how important are each of the following sources?" Percent of respondents who indicated that each of the following is a very important source for journal articles and scholarly monographs.



### Its complicated...

- Complex continuum of ways to offer papers online
  - Gold OA (everything from a particular journal is freely available)
  - Green OA (embargoes of different durations)
  - Hybrid OA (restricted access and Gold OA mixed in same journal)
  - Transient availability (collections opened up for a specific amount of time)

- "Our environment is getting richer and more diverse but this also comes with challenges to track and identify places where material is
  - freely available."
    - Christine Stohn,
       Ex Libris



- Earnings-neutral transition to Open Access
- Open access does not mean free access
  - HSBC Global Research.
     (2013). Academic publishing.
     https://www.research.hsbc.c
     om/midas/Res/RDV?ao=20&
     key=RxArFbnG1P&n=360010.
     PDF



## OA and discovery

- "Summon has a whopping 60+ Million records tagged as "Open Access" ranging from Journal Articles to Books to Patents to Photos..."
  - Nagy, Senior Product Manager, Discovery Services at Serials Solutions
- OCLC's OAIster includes more than 25 million records representing digital resources from more than 1,100 contributors
  - <u>http://www.oclc.org/oaister.en.html?urlm=168646</u>

### Harvest content

- MARC catalog records
  - Can be aggregated at the network level
  - Records to OA resources exist in most catalogues
  - Nothing in MARC to indicate OA status
- Institutional Repositories via OAI-PMH
  - Multi-tenancy means records can be shared
  - Does not index full-text (Google Scholar does)
  - OAlster (OCLC)

### **OA and academic libraries?**

- "One key finding was that in 2012, nearly 58% of the bibliographic references to journal articles were freely available from 229 unique sources but that academic libraries provide over half of this content, possibly either through subject or institutional repositories."
  - Budd, J. Free or open access to scholarly documents: Google Scholar or academic libraries. University of Missouri-Columbia. 2013 Dissertations. http://hdl.handle.net/10355/37582

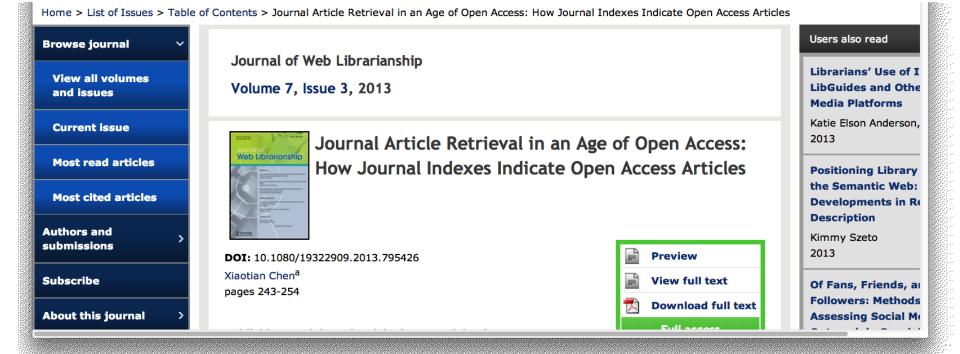
### Make OA collections part of knowledgebase

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Directory of Health Organizations			Not Tracked	0		National Library of Medicine		
Directory of Higher Education Programmes & Scholarships in European Countries (HEPSEU)			Not Tracked	0		European Books Limited		
Directory of Libraries in Canada			Not Tracked	0		ProQuest Micromedia		
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## Links and OpenURL

- Access works via direct links or OpenURL
- OpenURL deals with the appropriate copy issue, but has trouble with complex OA



- "OpenURL is one of the most exciting information technology innovations from recent years to link journal indexes to full-text articles. However, as more Green OA articles become available on the Internet, it is time that OpenURL link resolvers advance to the next level..."
  - Chen, X. (2013). Journal Article Retrieval in an Age of Open Access: How Journal Indexes Indicate Open Access Articles. Journal of Web Librarianship, 7(3), 243-254.

## **Google Scholar**

- "Google Scholar and PubMed are far better than subscription-based indexes in indicating and linking to OA full text. Both Google
   Scholar and PubMed can be configured to link to libraries' OpenURL link resolvers; thus, they have no problem linking to libraries' full-text subscriptions."
  - Chen, X. (2013). Journal Article Retrieval in an Age of Open Access: How Journal Indexes Indicate Open Access Articles. Journal of Web Librarianship, 7(3), 243-254.

## NISO

 Provide OA availability indicators through innovations or collaborations

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## Work directly with publishers

- Ex Libris, for example, has worked with Oxford and others to add open access articles from hybrid journals to Primo Central
- NISO standard might make this easier at scale

# The future of search

Image source: http://scm-I3.technorati.com/10/11/30/22623/RDFicon.png



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Confirmed: Elsevier Has Bought Mendeley For \$69M-\$100M To Expand Its Open, Social Education Data Efforts

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INGRID LUNDEN 😆

42

Monday, April 8th, 2013

Comment



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Educational publisher **Elsevier** is diving deeper into the world of open and social educational data: it has bought **Mendeley**, the London/New York-based provider of a platform for academics and organizations to share research and collaborate with others via a social network. The

42 Comments

terms of the deal have not been publicly disclosed but we understand it is for a sum between \$69 million and \$100 million. We first broke the news of this deal when it was still being negotiated, in **January**.

The acquisition will heat up competition between Elsevier and other large publishers moving into ed-tech, among them **Thomson Reuters**, which owns **EndNote**, a competitor to Mendeley.

Mendeley is both a technology/platform acquisition as well as an acqui-hire for Elsevier. CEO Victor Henning, one of the three PhD co-founders of Mendeley, tells us in an interview that all of Mendeley's 50 staff are coming over to Elsevier, and Henning will become VP of strategy for the company — a sign that Elsevier may be gearing up for more activity and possibly acquisitions in this space. (Picture of that Mendeley team

#### HAVE A TIP, PITCH OR GUEST COLUMN? TELL US.

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#### TRENDING STORIES



Twitter Co-Founder's Bold New Plan



Bump Contact Sharing App Acquired By Google

-

- "I think Elsevier's role as the bogieman [sic] of science publishing, while probably deserved, misses the point. They aren't really publishers

   they are a knowledge company. The next
   battle will be not over whether we can read
   for free, but whether we can gain access to knowledge for free."
  - Roderick Page, professor of taxonomy and the University of Glasgow

## **Beyond the index**

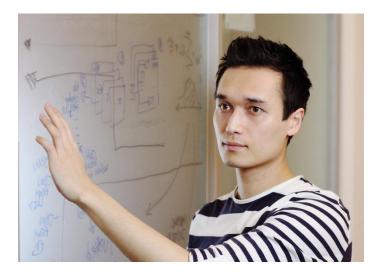


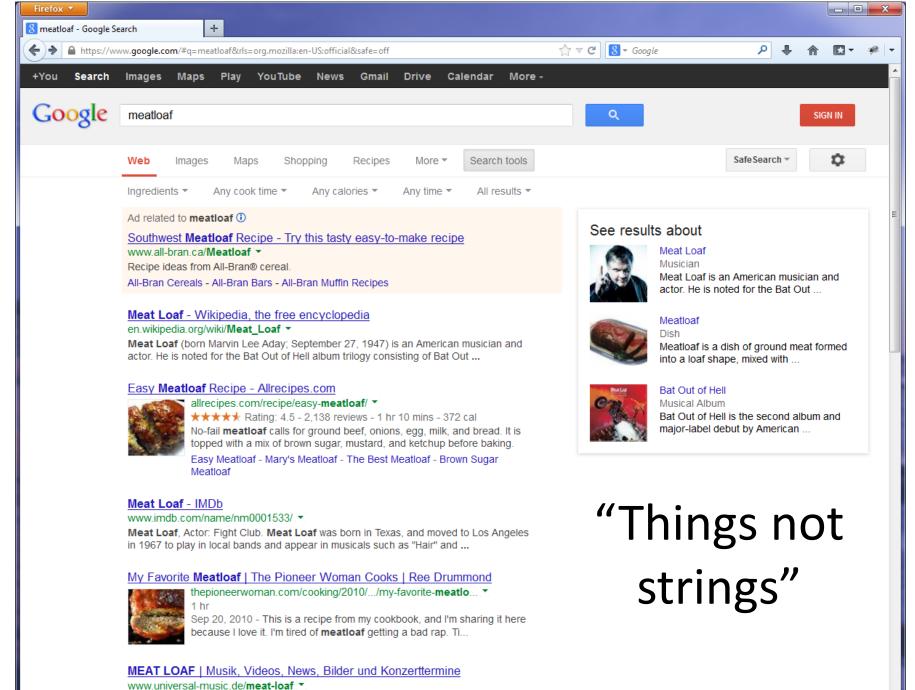
Image source: http://secretariageneral.ugr.es/pages/gabcom2012/vic torhenningenugr/!

- "We're transitioning from a world where its not just content but the valueadded services..."
- "…I think more and more revenue from publishers will come from these services…"

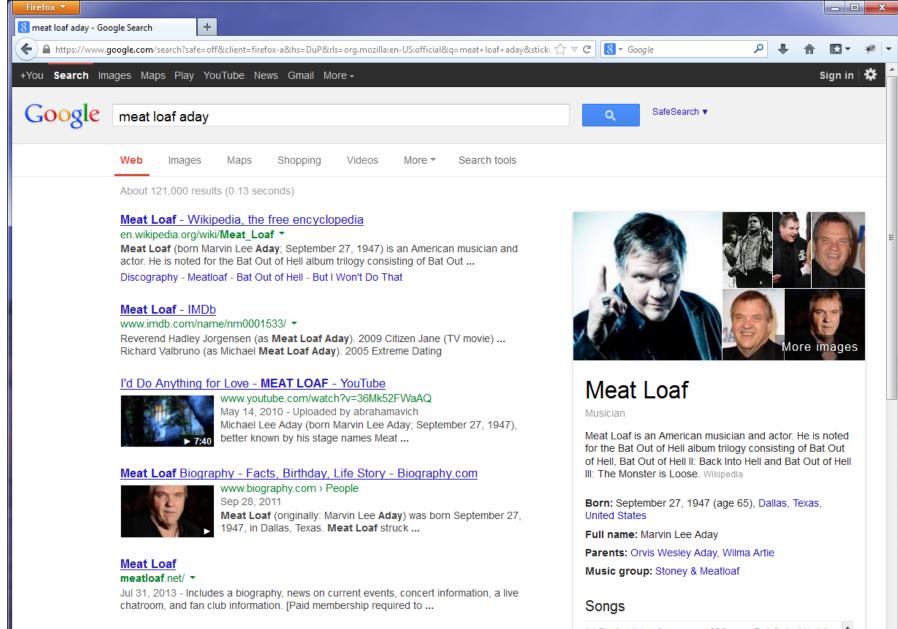
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	Create an academic profile, upload your pa	pers	Wolf Har	mening		

#### Insight engines?





Musik, News und Videos von MEAT LOAF sowie alle Termine, Fotos, Alben und Singles findest Du hiert

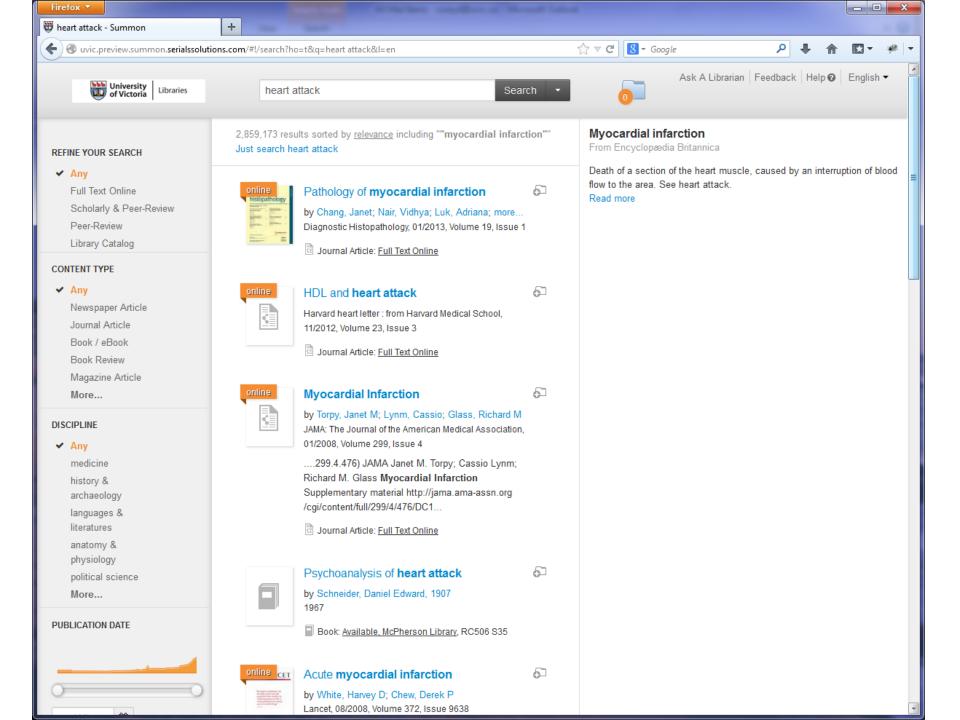


Happy Birthday, Meat Loaf! So, How DID He Get That Name .... music.yahoo.com/.../happy-birthday-meat-loaf-did-name-161218009.ht... 💌

Sep 27, 2012 - What is the real deal behind iconic musician/actor **Meat Loaf's** stage name? The superstar, who was born Marvin Lee **Aday** in Texas and turns ...

A Meat Loaf A Day Keeps the Successful Acting Career Away | Slog

I'd Do Anything f...1993Bat Out of Hell II: ...Paradise by the ...1977Bat Out of HellBat Out of Hell1977Bat Out of HellTwo Out Of Thre...1977Bat Out of Hell



## **Beyond 'strings'**

 "The rapid growth in publications...makes it no longer sufficient to provide access to content to human readers only...it is equally important to allow machines to analyze information to allow the emergence of new applications that will facilitate the process by which research is accomplished."

D-Lib Magazine guest editorial Sept/Oct 2013

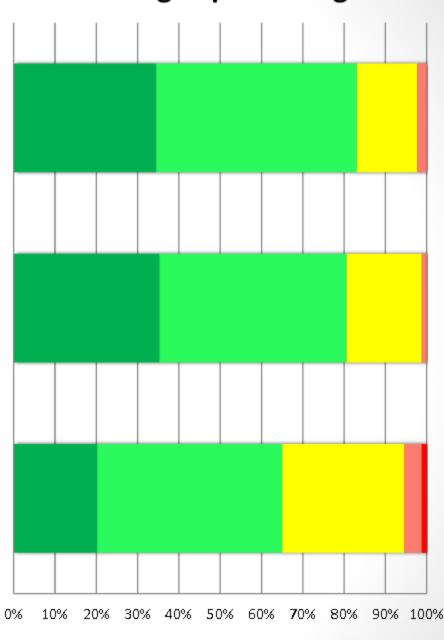
#### High expectations for content mining in publishing

very much agree somewhat agree neutral disagree disagree strongly

Scholarly publishers will mine their content for the purpose of content enrichment, semantic tagging and better navigation.

Content mining will rapidly expand into new areas, new applications and new directions

More new services like Mendeley and Citeseer will emerge as a result of better content mining technology.



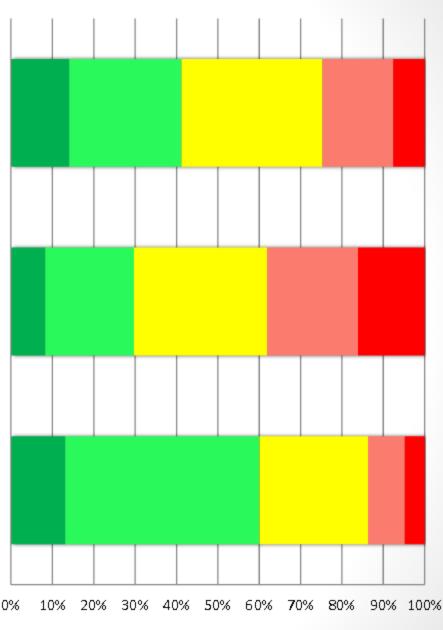
#### But differing expectations on:

very much agree somewhat agree neutral disagree disagree strongly

Content mining tools will deliver high precision results in an automated way, without manual curation

The copyright protection for derivative works (created via mining for example) should be made less restrictive.

The investments needed for semantic tagging of scholarly content will be a limiting factor.



### **Derivative information products**

- Products that summarize and display the information and relationships as available in the content corpus that was mined
  - Drives traffic
  - Functions as substitute
- Publishers' policies re: mining requests by 3<sup>rd</sup> parties
  - 53%: permission declined for creation products that compete/replace their original content offerings

### **Difficult conversations**

- "...the transition from purchased to open access content...will do more to reshape what libraries will be and do in the future...but this has not yet been carefully considered or broadly discussed."
  - Lewis, D. W. (2007). A strategy for academic libraries in the first quarter of the 21st century. College & Research Libraries, 68(5), 418-434.

 "I do think that libraries have a role that goes beyond providing access to content."



- "One key finding was that in 2012, nearly 58% of the bibliographic references to journal articles were freely available from 229 unique sources but that academic libraries provide over half of this content, possibly either through subject or institutional repositories."
  - Budd, J. Free or open access to scholarly documents: Google Scholar or academic libraries. University of Missouri-Columbia. 2013 Dissertations. http://hdl.handle.net/10355/37582

 "Now we, and presumably others, are talking about creating what are essentially consortiallevel discovery layers. Surely, the reasoning goes, if we all join forces and collections, then we'll hit that critical mass that will bring users back to us. Why bother, really? Google won the search discovery wars years ago, and nothing we can do is going to change that." – Dale Askey, September 17, 2013

## Thanks

- Thanks especially to Andrew Nagy at Serials Solutions and Christine Stohn at Ex Libris
- <u>coreyd@uvic.ca</u>