

Metadata at its Origin - Publishers Talk about Metadata

Tamar Ganor | Content Product Manager, Ex Libris

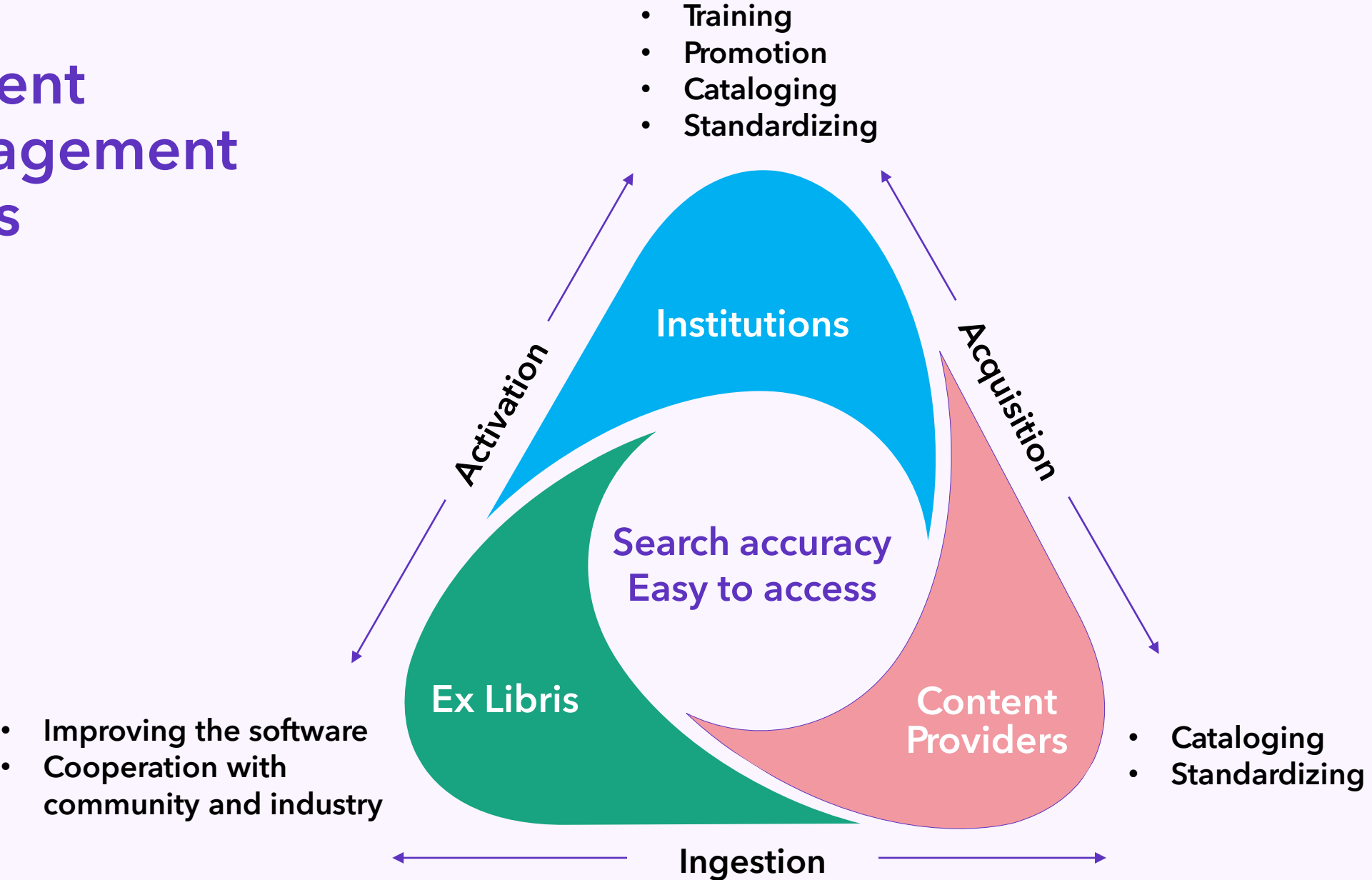
Julia Mielish, MLIS | Discovery Manager, Oxford University Press

Manisha Sanghavi | Senior Discovery Operations Manager, Sage Publishing

Agenda

- Ex Libris
 - Content management goals
- Oxford University Press
 - The metadata journey
- Sage
 - Workflows and challenges

Content Management Goals



Challenges

- Staying current and up to date
- Open Access
- Decline in resources
- High mobility
- Staying innovative

Cooperation, Transparency, Creativity

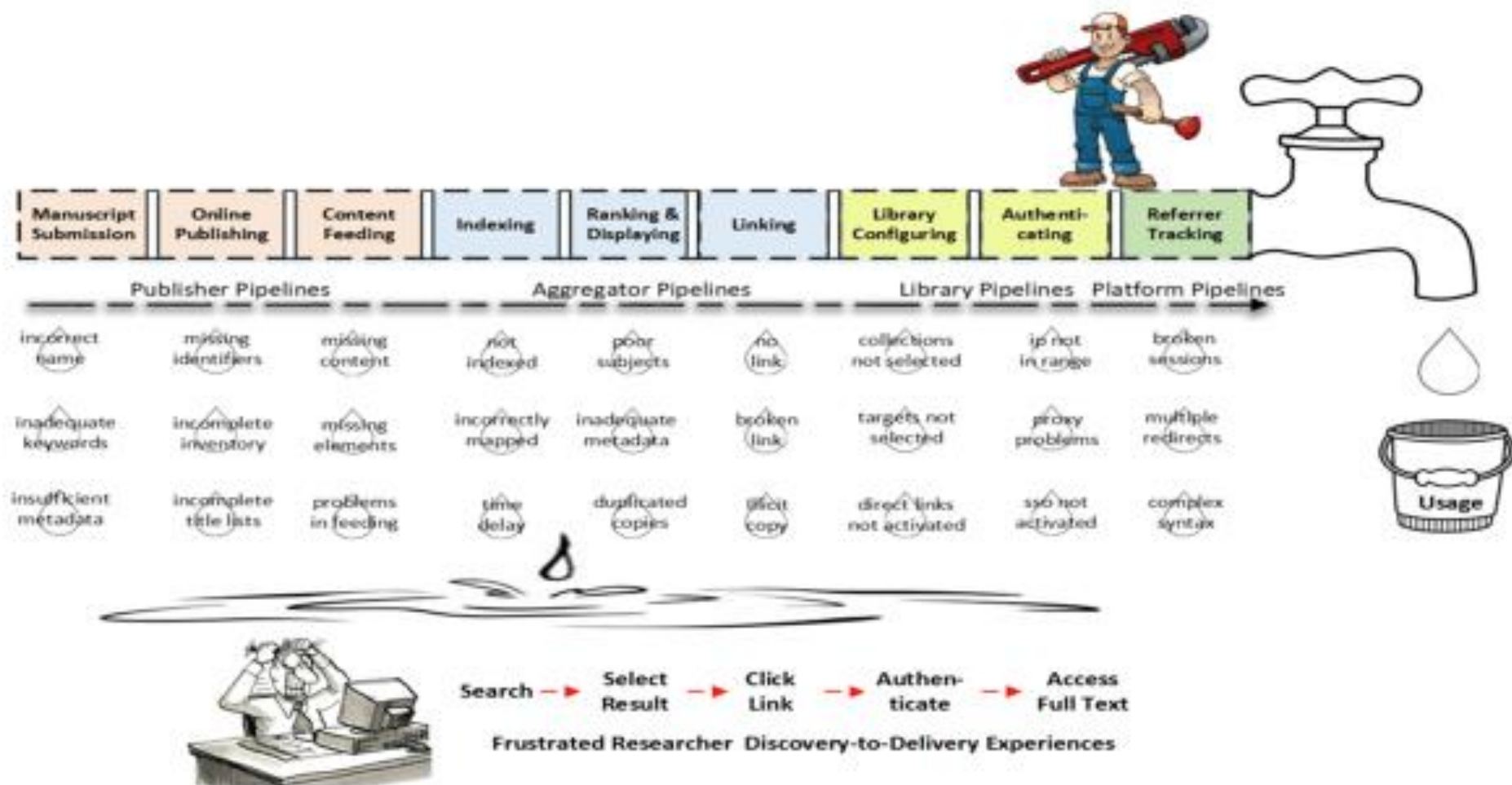


Traveling with Metadata: or how does OUP deliver content

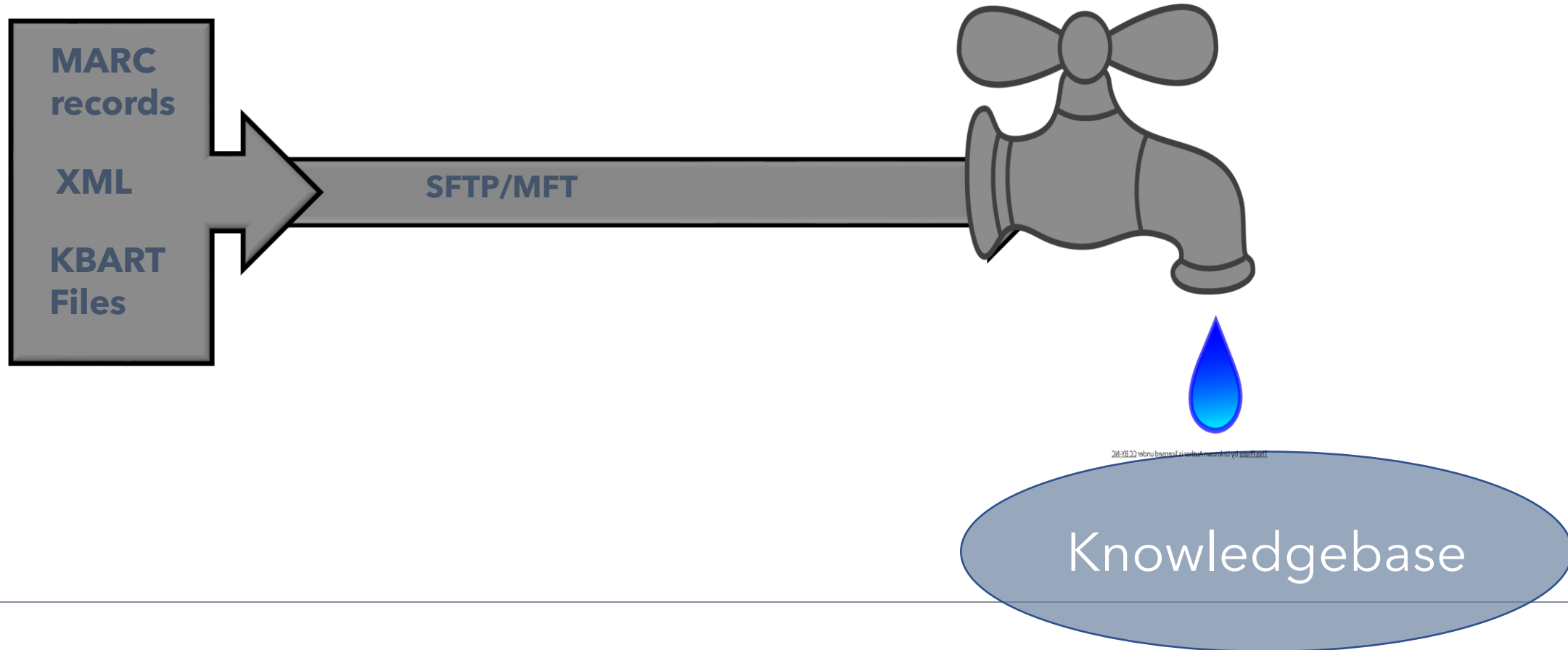
Julia Mielish: Discovery Manager

Building Pipes and Fixing Leaks

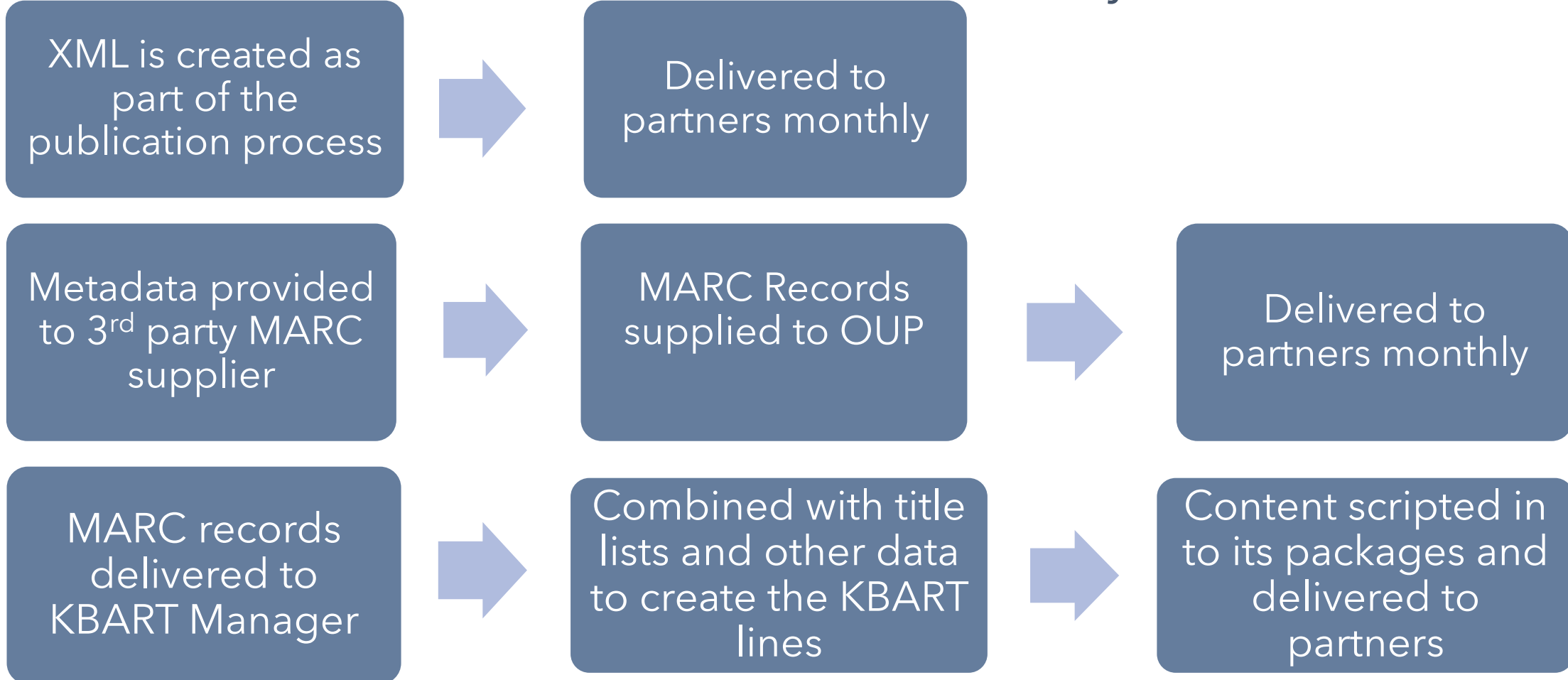
Demystifying and Decoding Scholarly Information Discovery & Interchange



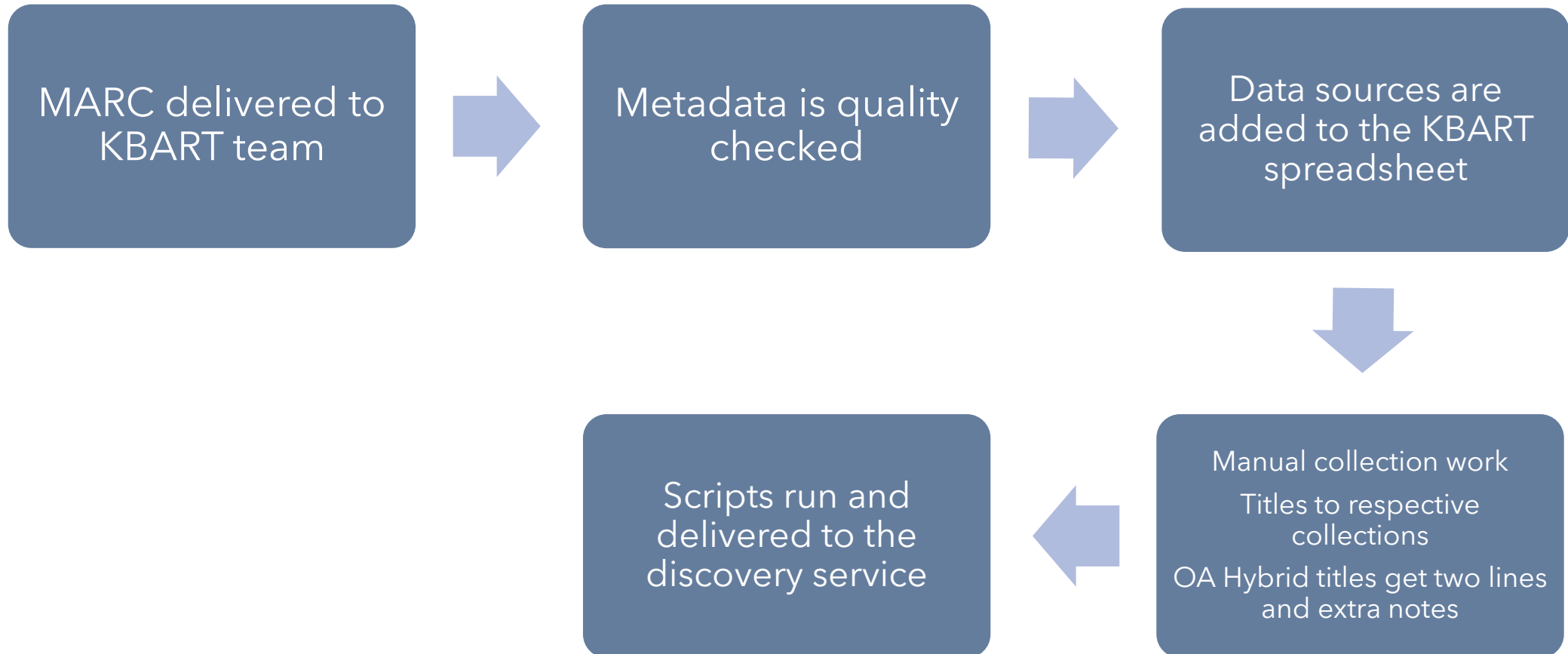
Metadata from OUP



Metadata and MARC Creation and Delivery



KBART



Ways of Working with ExLibris

Annual Collection building

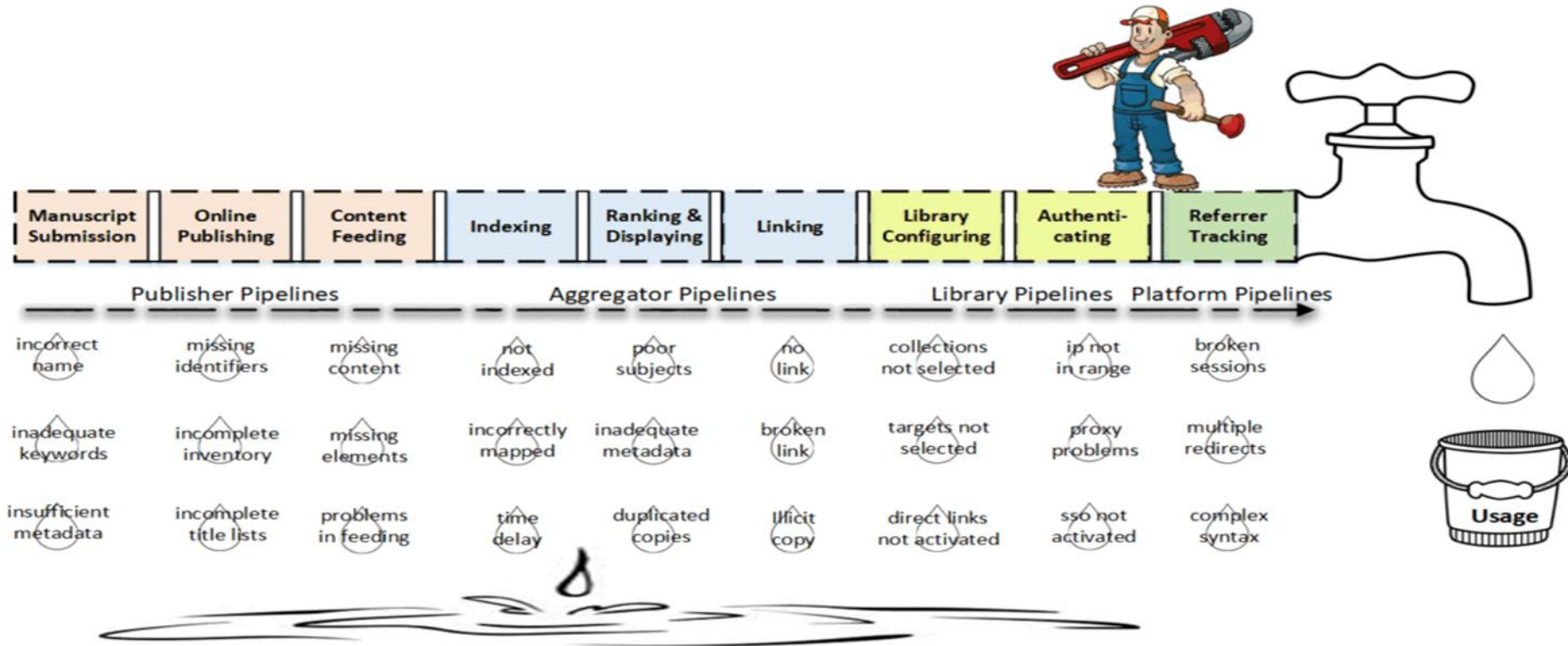
Manifest publication

Naming conventions for file types

Monthly check-ins with the Provider Relations Team

Building Pipes and Fixing Leaks

Demystifying and Decoding Scholarly Information Discovery & Interchange



Search → Select Result → Click Link → Authenticate → Access Full Text

Frustrated Researcher Discovery-to-Delivery Experiences



Metadata at its Origin – Publishers Talk about Metadata

A Content Quarterly Webinar with Ex Libris and Oxford University Press

Manisha Sanghavi

Senior Discovery Operations Manager

Manisha.Sanghavi@Sagepub.co.uk

28th September 2023

Content Discovery

✓ Full-text Indexing 

✓ KBART files 

✓ MARC Records 

✓ Relationship Management 

**INDEPENDENT
SINCE ~ 1965**

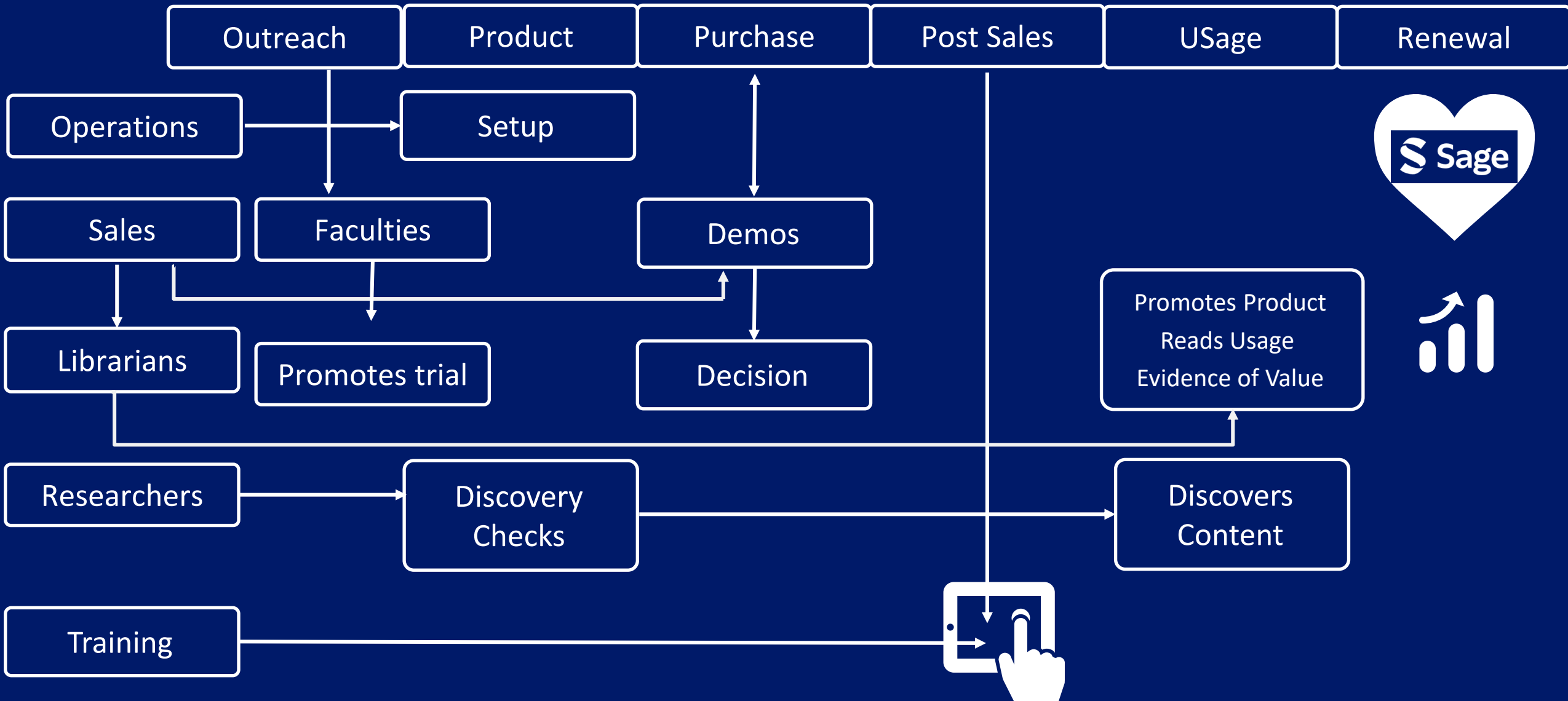
What do you think would be ideally part of Upstream at academic publisher?



Upstream

- Product setup 
- XMLs delivery setup 
- Crossref Registration 
- MARC XSLTs 
- Collections setup 
- Metadata Management 
- Internal Teams Liaison 

Publishing Workflows



Learning Resources

Sage Research
Methods

Sage Business

Sage Courses

Sage Data

Sage Skills

Sage Video

Sage Journals

Sage Catalyst

Sage Reference &
Academic
Books

CQ Press Library



Full-text Indexing

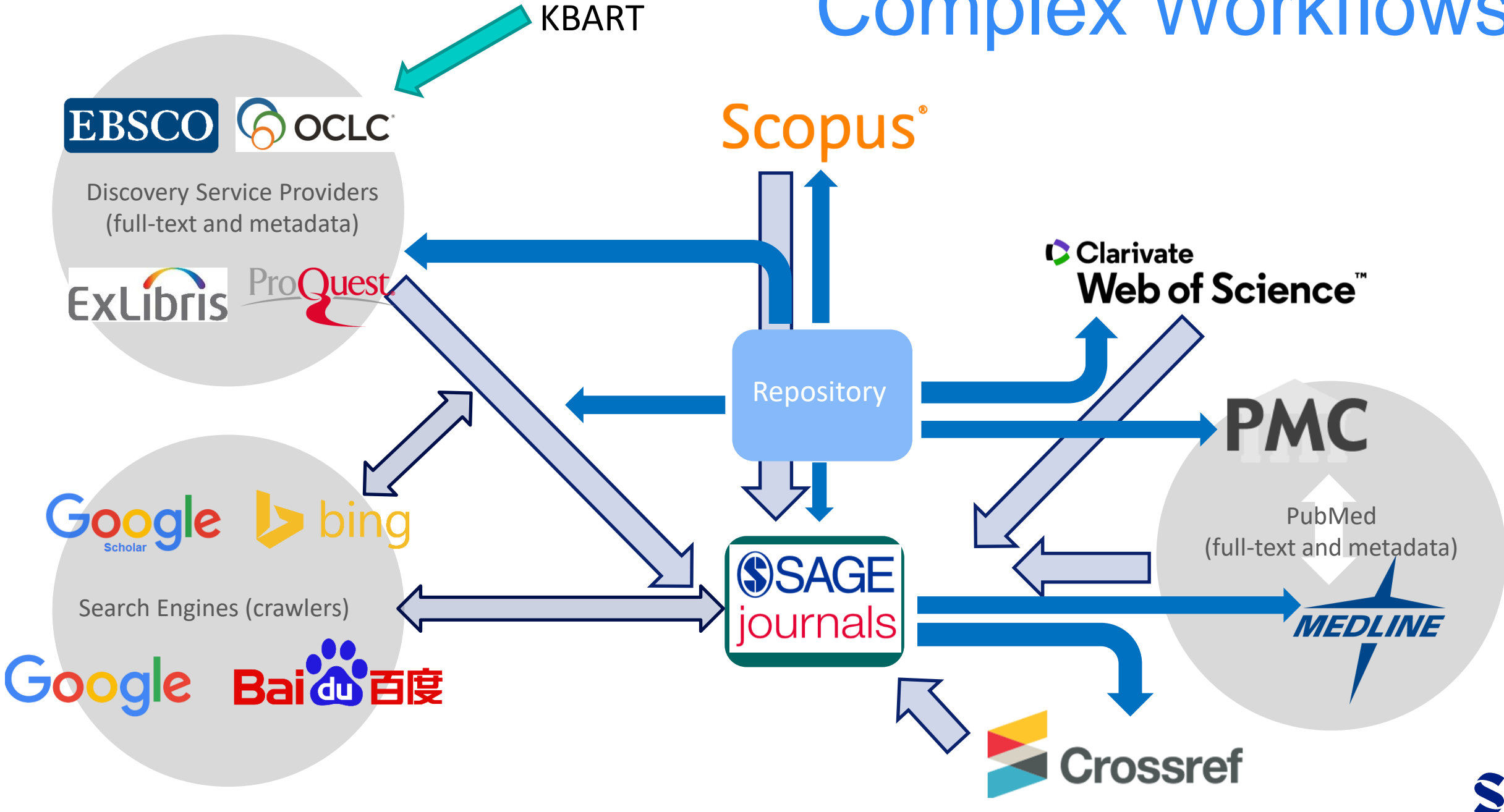
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  </jrnl>
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Full-text Indexing



Complex Workflows



KBART II Compliance Workflow

Phase 1 (Product Setup) Phase 2 (Content Production) Phase 3 (Quality Assurance) Phase 4 (Delivery)

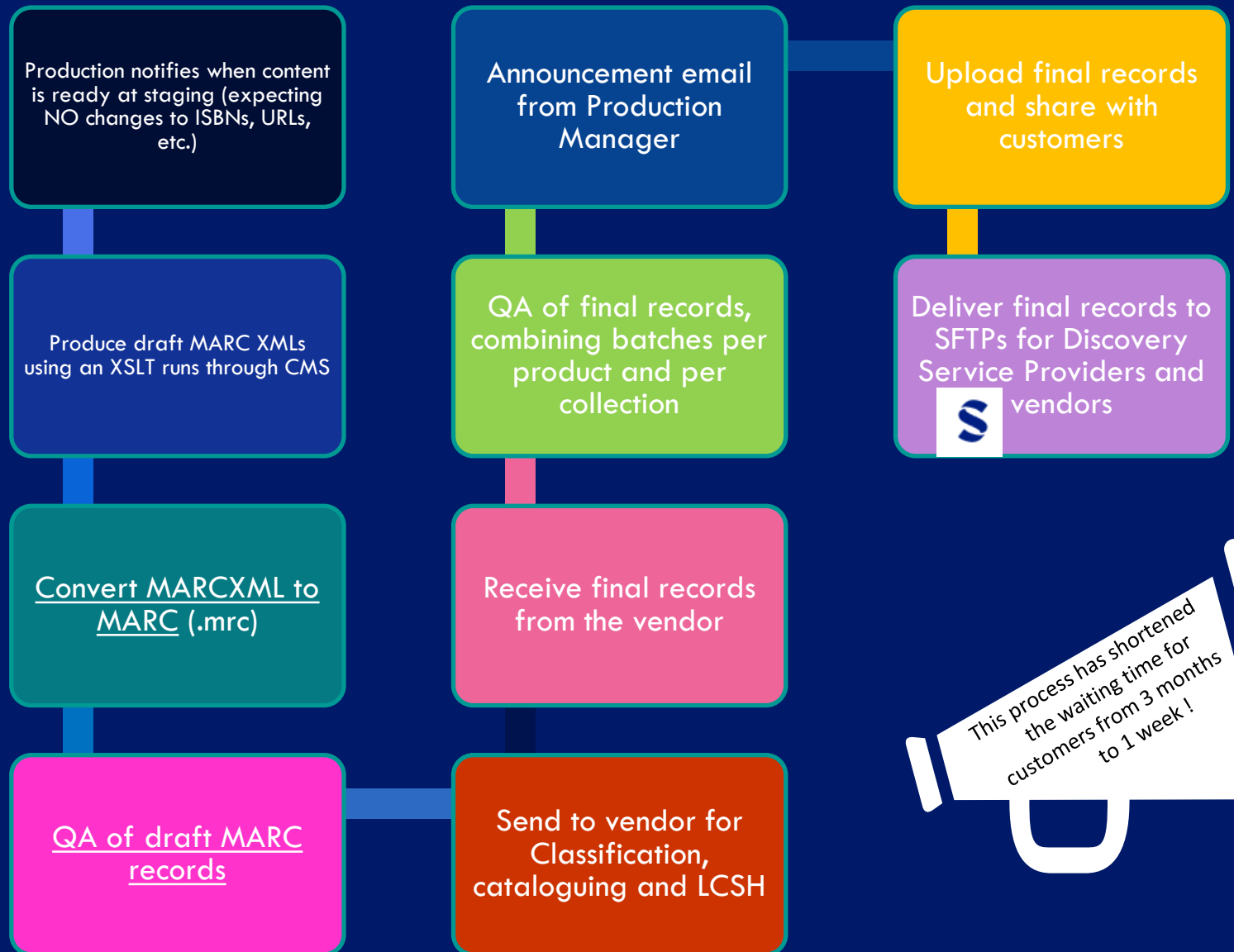
Phase	Planning Strategy	Phase	Content Strategy	Phase	Audience Strategy	Phase	Platform Strategy
1	Components setup in the systems	1	prioritization model and on time launch	1	Enhancing audience profile with accurate data	1	Seamless access
2	Content production according to the setup	2	Creating Schematron rules to avoid unwanted delays to downstream	3	LEAN Scoring	2	CMS is the second source of truth and Database is the first
3	Checking sample content with Discovery Service Providers	3	Making KBART processes LEAN	3	Customer Lifecycle Audience Identification	2	Workflow and Content Management Tool
4	Delivery of bundles in KBART II compliant format	4	Automation	✓	Enhancing customers' experience with existing data and processes	2	Data accessibility for customers selection
						3	ERM connector tool

Data Roadmap management

Learning and Effectiveness Development (LED)

LEAN Continuous Improvement

SMART & LEAN Processes: MARC Records





Use of Taxonomy & Discipline

\$

MARCSXST



650 -
LCSH



050 -
LCC



082 -
DDC

BusMgt-1-3
Counsel-4-4
Edu-6-5

Business
Environment
Counseling
Military Veterans
& Families
Elementary
Behaviour



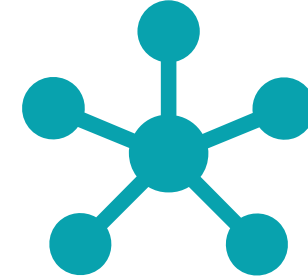
Ideally, these three elements are necessary for seamless access.



Full-text
Indexing in
Discovery
Systems



KBART
in the
Knowledge
Base

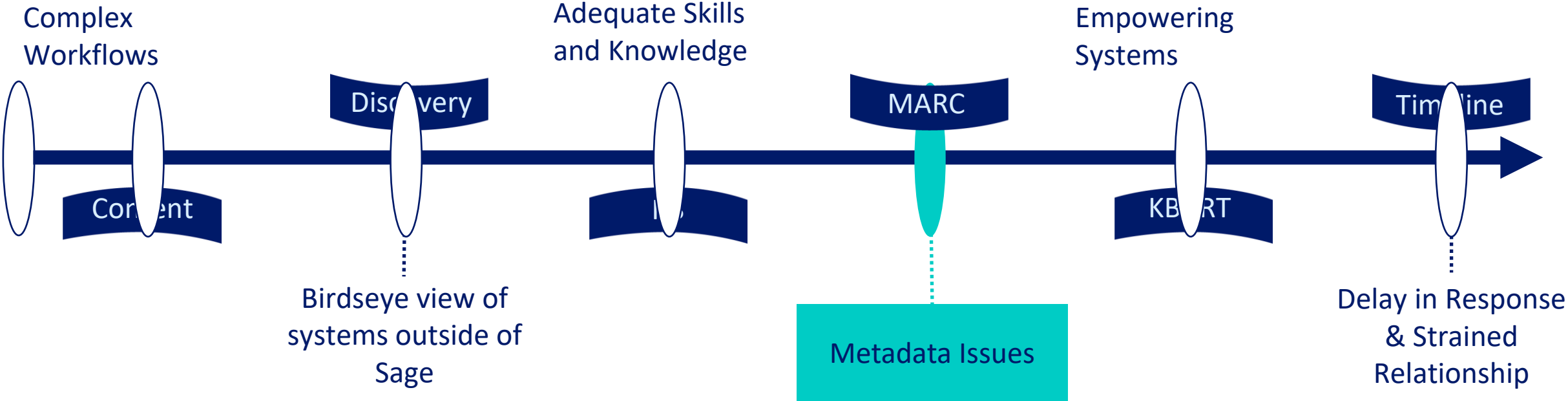


MARC
records
in
LMS

What do you think are the challenges in Content Discovery for Academic Publishers?



Challenges



Manisha arranged a very helpful and informative session on discoverability for the sales team. We frequently receive questions from our library customers related to discoverability issues, for example, not being able to find the right package to activate in their knowledgebase. Historically we've not really understood how to adequately answer these questions, (even if it turns out there's a simple answer!) as the whole process on our side and the vendor side has been a bit of a mystery. When this was raised with Manisha, she offered to arrange a training session to go through the whole process and actually demo some of the ERM vendor platforms for us. She arranged several sessions to ensure everyone had a chance to attend, and these were immensely helpful in answering our most common questions. Manisha also created a confluence space with answers to all the FAQs we raised during the session. This will help the sale team answer customers questions quickly without having to look for more information and will save us so much time. Thank you, Manisha!

From Sales

Thank you very much for the quick response on helping to locate EISSNs that might be inaccurate within our data to help provide this information to the appropriate teams for resolving before the orders are entered by our team.

From Account Support

I started exploring SAGE Explorer's discoverability side of things and was having a couple of meetings with Manisha. Manisha was great at explaining KBART file set up for Explorer and answering my questions around discoverability. Thank you and looking forward for more meetings!

From Product Innovation

I don't know what magic you do but SAGE Journals content works really well with my discovery system.

From one of the Librarian Customers

Manisha has been on our radar in the Sales Team a lot lately, for all the work she's done on discoverability. In the last few weeks, she arranged and ran two really great sessions for the sales team on indexing, MARC records and KBART processes - these helped to demystify, explain and support and were highly rated by all attendees. Secondly, Manisha contributed to the successful delivery of MARC records for all library products within 2 weeks of publication and with 100% accuracy. This prevents a huge number of dead fish coming to the sales and circulation teams when customers and agents complain. We don't have to worry about this anymore and that is fantastic. Thank you.

From Sales



 Main Offices

 Sales and Support

“Our independence allows us to remain mission-driven for the long term”

Sara Miller McCune

Founder

ExLibris
Part of Clarivate

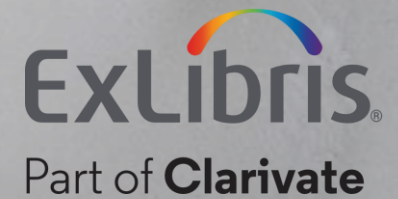
Thank You!



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