

Content Ingestion: The Trials and Triumph

Primo & Summon Content Updates + Big Data Analytics for Better Discovery

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Christine Stohn, Product Manager – Discovery and Delivery

2016-2017 Plan - Moving to a Shared Content and Data Model



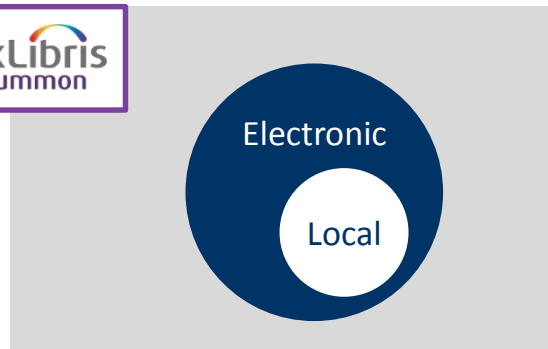
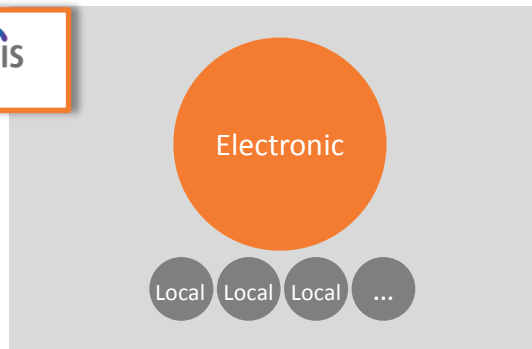
**Shared
electronic
collections**



**Unified content
ingestion
process**



**Loading of existing
content and data
enrichment to Primo
Central / Summon Index**



No change to the method of managing local collections in
Primo and Summon

>90 Content types

>4,000 Databases

>2.6 B records

Immediate Benefits



**What We
Promised**

Streamlined process for adding new content

Increased velocity for getting new and backlog content indexed

Provides opportunities to further enrich metadata and correct issues with metadata

2016-2017 – Progress Report

- ✓ Establish single ingestion pipeline for new content
- ✓ Consolidated Provider Agreements & Closed Content Gaps
- ✓ NERS voting & Content Idea Exchange

ExLibris
Primo



75

New Providers

520

New Collections

ExLibris
Summon



1145 Commercial package updates & reloads

73

New packages

176

Purged Packages

HIGH LEVEL PRIORITIES



Gap Analysis Project

- ~ 20 providers that have currency, metadata or linking issues
- Collection level audits



New Content

- NERS voting
- Idea Exchange
- Regional Content



Strategic Content

- Institutional Repositories
- Open Access
- Reference Content
- Orcid ID
- Controlled Vocabularies

Provider Optimization Program



- In partnership with our Global Content Alliance team established “P.O.P.”
- Quarterly meetings with our top content providers
 - Share our roadmaps and discuss new features that might impact content providers or that might require deeper metadata
 - Align on new content, new platforms, etc.
 - Perform content audits
- Mutual goal of optimizing and maximizing content and metadata available for discovery



Content Ingestion: The Trials and Triumph

Dave Hovenden –
Sr. Manager, Content Operations

Content Ingestion: The Trials and Triumph

ELUNA 2017 – May 11, 2017

Dave Hovenden – Sr. Manager, Content Operations

Before We Begin...



2.9 Billion Records in the Summon Index



1.3 Billion Records in the Primo Central Index



29.6 Million Titles in the 360 Knowledgebase



15.6 Million Portfolios in the Alma CZ



16,500+ Full-Text Databases in the 360 Knowledgebase



6,300+ Full-Text eCollections in the Alma CZ

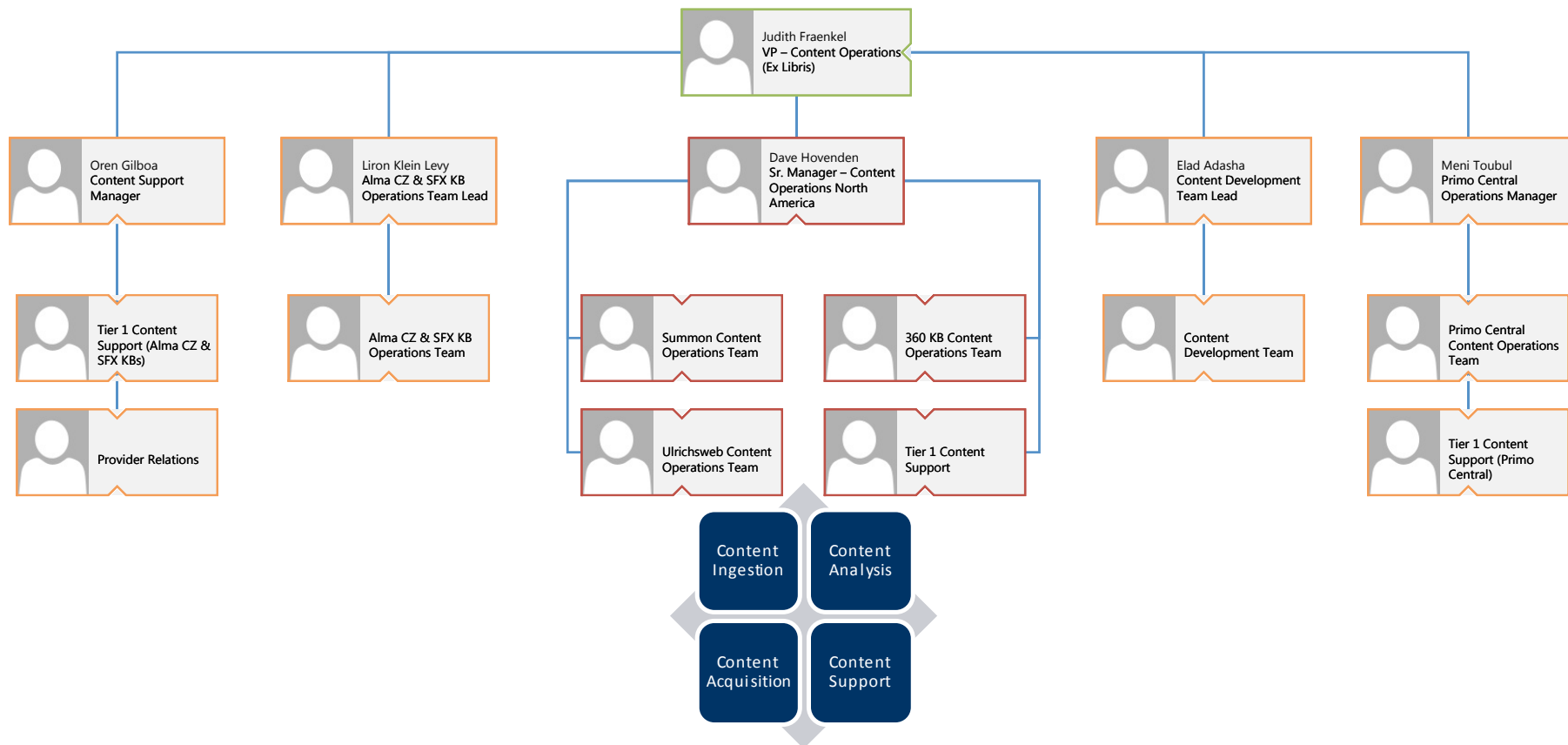


Over 5,000 Data Sources, including Publishers, Vendors, and Content Providers



Managed and maintained by a team of 60+ Metadata Librarians, and Content Analysts worldwide

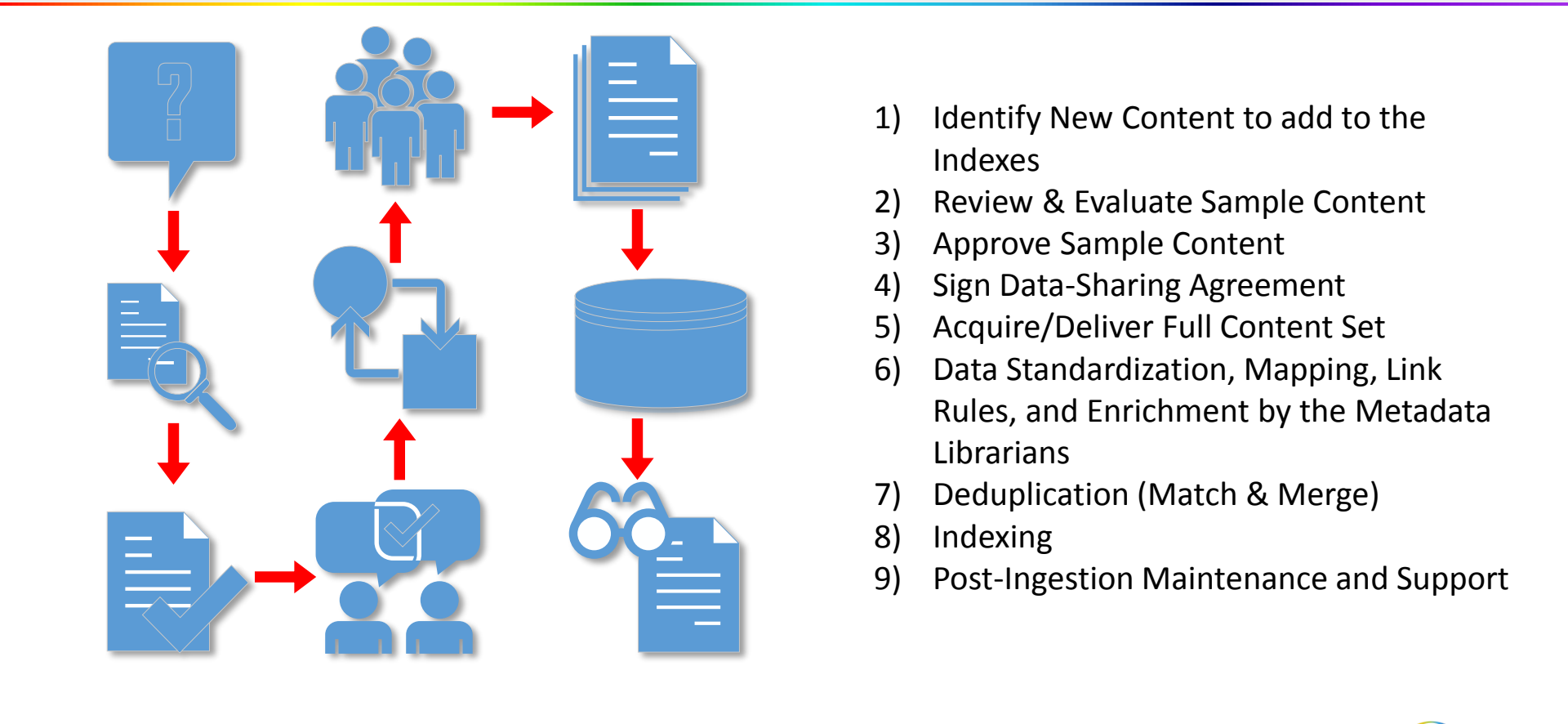
Ex Libris Content Operations





Discovery Content Ingestion





- 1) Identify New Content to add to the Indexes
- 2) Review & Evaluate Sample Content
- 3) Approve Sample Content
- 4) Sign Data-Sharing Agreement
- 5) Acquire/Deliver Full Content Set
- 6) Data Standardization, Mapping, Link Rules, and Enrichment by the Metadata Librarians
- 7) Deduplication (Match & Merge)
- 8) Indexing
- 9) Post-Ingestion Maintenance and Support

The Metadata That We Look For — Discovery

Title Metadata

- Article Titles
- Book Titles
- Chapter Titles
- Publication Titles
- Subtitles

Identifier Metadata

- Unique IDs for Specific Articles, Chapters, etc.
- Publication-level Unique Identifiers (e.g., ISSN, ISBN-10/13)
- Additional Identifiers (OCLC Number, LCCN, DOI, etc.)

Publication Information Metadata

- Publisher
- Author(s)
- Corporate Author(s)
- Volume Numbers
- Issue Numbers
- Start Pages
- Publication Date(s)
- Publication Series or Imprints
- Publication Place

Additional Metadata

- Subject Headings
- Keywords
- Language
- Classification
- Abstracts
- Open Access Flags
- Full-Text Available Flags

Metadata Schema & Structure

- MARC21
- MODS
- Dublin Core
- NLM / JATS
- ONIX
- Well-structured, and labeled, homegrown schemas

Example of a Good Metadata Record (Discovery)

```
<eBook>
  <Content_Modified>false</Content_Modified>
  <BibData>
    <EISBN>9781614581048</EISBN>
    <PISBN>9780892216963</PISBN>
    <OCLC_Control>817084723</OCLC_Control>
    <Title>Yesterday, Today and Forever</Title>
    <Sub_Title/>
    <Publication_Date>2009-06-01 00:00:00.0</Publication_Date>
    <Imprint>New Leaf Publishing Group, Inc.</Imprint>
    <Pages>177</Pages>
    <Adult_Juvenile>A</Adult_Juvenile>
    <Product_ID>10626803</Product_ID>

  </BibData>
  <Contributor>
    <Name>von Trapp, Maria</Name>
    <Role>Author</Role>
  </Contributor>
  <BISAC>
    <Literal>RELIGION</Literal>
  </BISAC>
  <BISAC>
    <Literal>Christian Life / Inspirational</Literal>
  </BISAC>
</eBook>
```

- The metadata highlighted in red are the metadata points we typically look for when reviewing sample data
- The metadata here is fairly complete, and includes several unique identifiers such as both print and electronic ISBNs, and an OCLC control number
- The metadata fields are well-structured, labeled, and in a logical order that is easy to read and understand

Example of a More Challenging Metadata Record (Discovery)

```
<source-issue>
  <key>0002457632</key>
  <T1>N 20161028</T1>
  <PW>IP200722</PW>
  <GA>158AN</GA>
  <SQ>13382J0</SQ>
  <PT>J</PT>
  <SO>ACTA PETROLOGICA SINICA</SO>
  <JI>Acta Petrol. Sin.</JI>
  <J1>ACTA PETR S</J1>
  <J2>ACTA PETROL SIN</J2>
  <J9>ACTA PETR SIN</J9>
  <CF>D</CF>
  <SC>D KY GEOLOGY</SC>
  <SN>1000-0569</SN>
  <PU>SCIENCE PRESS</PU>
  <PI>BEIJING</PI>
  <PA>16 DONGHUANGCHENGGEN NORTH ST, BEIJING 100717, PEOPLES R CHINA</PA>
  <VL>23</VL>
  <IS>2</IS>
  <PY>2007</PY>
  <PD>FEB</PD>
  <TV>Y</TV>
  <IL>00002</IL>
  <LD>20070528-14:53:44</LD>
  <IO>20160002457632</IO>
</source-issue>
```

```
<source-item>
  <key>000245763200001</key>
  <T2>C 20161023</T2>
  <T3>AR,CI</T3>
  <TI>Lu-Hf isotopic systematics and their applications in petrology</TI>
  <AU>Wu, FY</AU>
  <RO>Author, Reprint Author</RO>
  <LN>Wu F Y</LN>
  <EM>wufuyuan@mail.igcas.ac.cn</EM>
  <AU>Li, XH</AU>
  <RO>Author</RO>
  <LN>Li X H</LN>
  <AU>Zheng, YF</AU>
  <RO>Author</RO>
  <LN>Zheng Y F</LN>
  <AU>Gao, S</AU>
  <RO>Author</RO>
  <LN>Gao S</LN>
  <DT>R Review</DT>
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  <DE>Lu-Hf isotope</DE>
  <DE>petrology</DE>
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  <ID>NORTH CHINA CRATON</ID>
  <ID>MC-ICP-MS</ID>
  <ID>PLASMA-MASS SPECTROMETRY</ID>
  <ID>IN-SITU HF</ID>
  <ID>MANTLE HETEROGENEITY BENEATH</ID>
  <ID>ULTRAHIGH-PRESSURE ECLOGITE</ID>
  <ID>OCEAN FERROMANGANESE CRUSTS</ID>
  <ID>TRACE-ELEMENT FRACTIONATION</ID>
  <ID>SPINEL PERIDOTITE XENOLITHS</ID>
  <AV>Y</AV>
  <NR>303</NR>
  <RS>DOI 10.1016/j.jepsl.2005.07.011</RS>
</source-item>
```

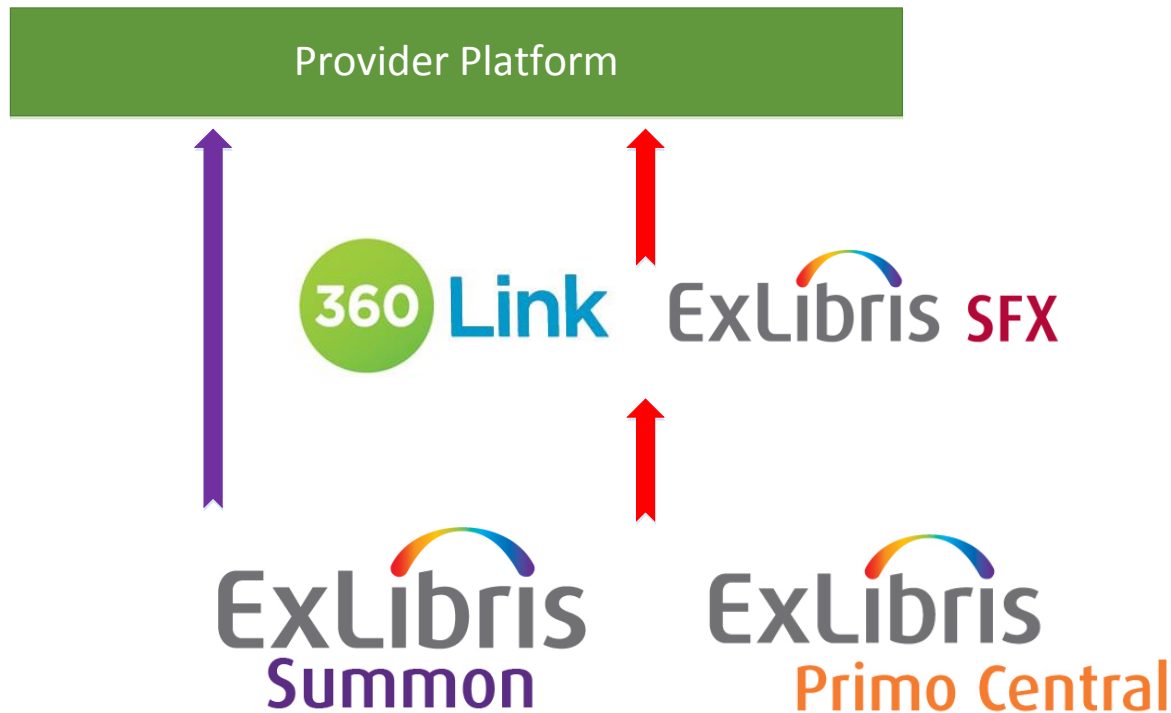

Determining Linking Methods

Index-Enhanced Direct Linking (IEDL)

- Summon constructs direct link rules to the publisher/provider platforms based on the metadata supplied
- IEDL tends to be more stable and successful when getting users to the content that they are looking for

OpenURL Linking

- Summon and Primo Central send the metadata to a link resolver (360 Link, SFX, etc.)
- The link resolver will then attempt to create a URL that resolves to the target platform



Data Standardization, Mapping, Link Rules, and Enrichment - Discovery

Data Standardization

- Very basic high-level clean-up of the data to standardize it
- Examples include:
 - Remove leading/trailing white spaces in Title and Subtitle fields
 - Clean-up diacritics and other encoding issues

Mapping

- Metadata Librarians map the metadata fields in the records to our schemas
- This allows the metadata to appear in the UI and/or be made searchable within Summon or Primo Central

Link Rules

- Metadata Librarians will create or modify link rules to enable direct linking of the content from Summon

Enrichment

- Enriching the content by adding additional metadata when applicable
- Examples:
 - Scholarly/peer-reviewed flags from Ulrichsweb (Summon)
 - Citation counts from Scopus (Summon)
 - Citation trails (Primo Central)

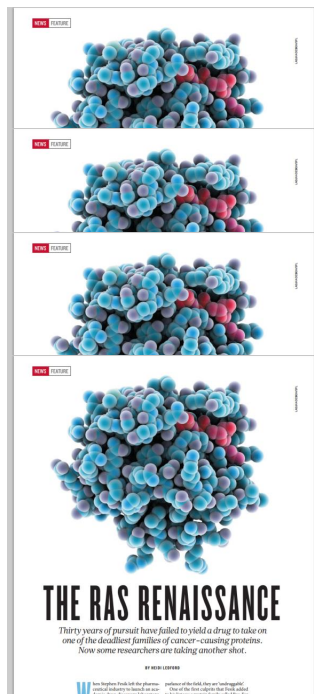
Match & Merge at a High-Level

DOI

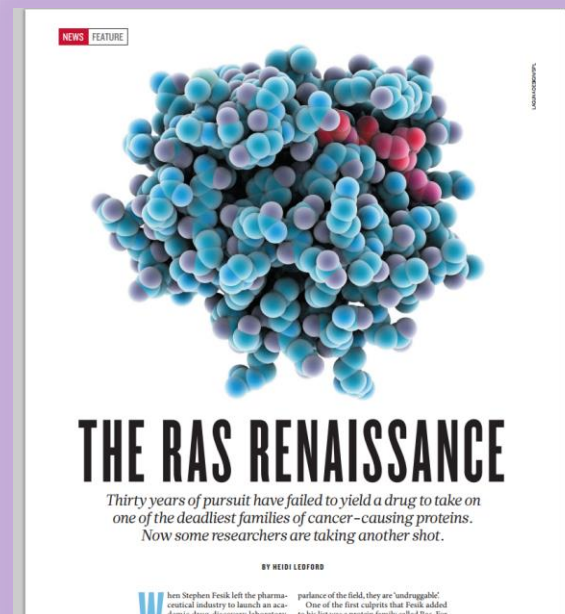
Start/End Pages

Subject Headings

Abstract



- Summon displays a Single Record
- Primo displays an enriched record and options to view all versions



DOI

Abstract

Start/End Pages

Subject Headings

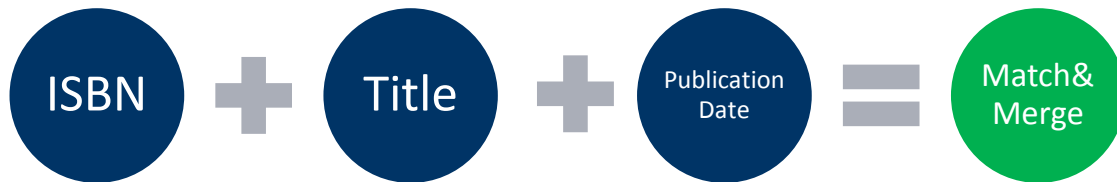
Cancer: The RAS Renaissance
by Ledford, Heidi
Nature, ISSN 0028-0836, 04/2015,
Volume 520, Issue 7547, pp. 278-280

Match & Merge Rules

ISSN Match Rule



ISBN Match Rule



DOI Match Rule



Match & Merge Challenges

- Slight differences in the metadata can cause records to not de-duplicate
- Each provider/source will treat the metadata differently, making it difficult at times to reconcile or catch upfront
- Make the rules too strict, and you'll undermatch; make the rules too loose, and you'll overmatch

The screenshot displays a search results interface with three entries, each representing the same article: "Protective Effect of Tetracycline against Dermal Toxicity Induced by Jellyfish Venom". The entries are numbered 3, 4, and 5 on the left. Each entry includes a document icon, an "online" label, an "Open Access" lock icon, the article title, authors (Kang, C.; Jin, Y.B.; Kwak, J.; More...), the journal (PLOS ONE, 03/2013, Volume 8, Issue 3), a background paragraph, and a "Full Text Online" link. In entry 4, a red arrow points to the ID field "e57658". Entry 5 has a red arrow pointing to the journal name "PloS One". The interface also shows a "WEB OF SCIENCE" badge with a count of 5 and a "Preview" button for each entry.

Post-Ingestion Maintenance & Support

Currency

- Currency is the process of the publisher/provider sending to Summon new/updated metadata records, or record deletions for content that need to be removed
- Frequency of providing updates is often at the discretion of the publisher/provider

Metadata Issues

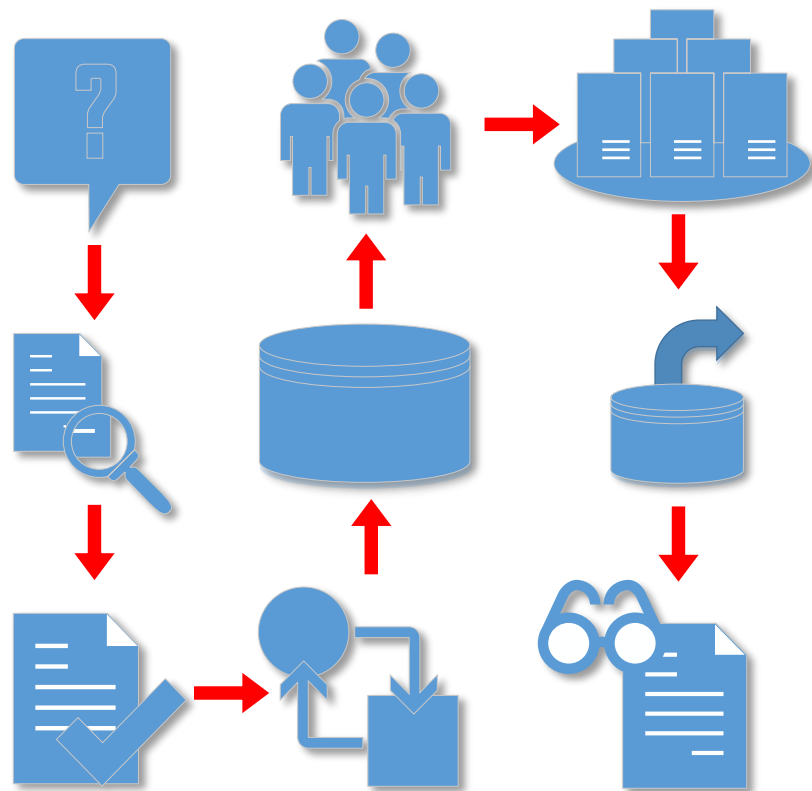
- Address reported issues of metadata quality from Summon customers
- Most issues involve incorrect metadata, or slight variations in the metadata that may impact OpenURL linking or the Match & Merge process and create duplicate records



Knowledgebase Content Ingestion



Content Ingestion Process for KB – High-Level Overview



- 1) Identify New Content to add to the Knowledgebases
- 2) Review & Evaluate Sample Content
- 3) Approve Sample Content
- 4) Acquire/Deliver Full Content Set
- 5) Create the Database in the Knowledgebase
- 6) Data Standardization, Mapping, and Enrichment by the Metadata Librarians
- 7) Load Title List into the Database within the Knowledgebase
- 8) Set-up the Linkers
- 9) Post-Ingestion Maintenance and Support

The Metadata That We Look For — Knowledgebase

General

- Title
- Identifier (Print)
- Identifier (Online/Electronic)
- URL
- Coverage (Full-Text vs. Abstracts)
- Content Type
- Title ID
- Publisher
- Access Type (Paid or Free)

Serials

- Start Date
- End Date
- Embargo
- Volume*
- Issue*

Books

- Date Published (Print)
- Date Published (Online)
- Author
- Volume
- Edition
- Editor
- Parent Publication Title ID

- We **highly recommend (and prefer)** that publishers and providers supply their data in the Knowledge Bases And Related Tools (KBART) format



*SFX and Alma CZ KBs only

Data Standardization, Mapping, and Enrichment - Knowledgebase

Data Standardization

- Basic clean-up of the data before being ingested into the Knowledgebase
- Examples include:
 - Clean-up diacritics and other encoding issues
 - Date formatting

Data Mapping

- Metadata Librarians map the metadata fields in the records to the Knowledgebase schemas

Data Enrichment

- Enriching the content by adding additional metadata when applicable
- Examples:
 - Represent Title Splits
 - Original/Copy MARC Cataloging
 - Authority Record creation

Knowledgebase Cataloging and Authority Records

The 360 KB team has its own in-house team of Metadata Librarian Catalogers that maintain and normalize provider holdings to 360 KB Authority Records

Holdings for the same title, regardless of who the provider is, are all mapped and linked to an Authority Record (when available) and assigned a **Serials Solutions ID (SSID)**

Authority Records may be based off MARC records from the Library of Congress, National Library of Medicine, Bowker, or the provider itself

The Catalogers also do original/copy cataloging of MARC records for the Library of Congress and the Program for Cooperative Cataloging (PCC)

The 360 KB Catalogers are the only commercial vendor partner participating in the Electronic Cataloging in Publication (ECIP) Program



Post-Ingestion Maintenance & Support

Metadata Issues

- Add ISBN or ISSN
- Dates of Coverage
- Incorrect/Bad Metadata
- Missing Title(s)
- Extra Title(s)
- Broken URLs (Journal and/or Database-level)
- Title Split Request
- Normalization Request

Provider/Database Issues

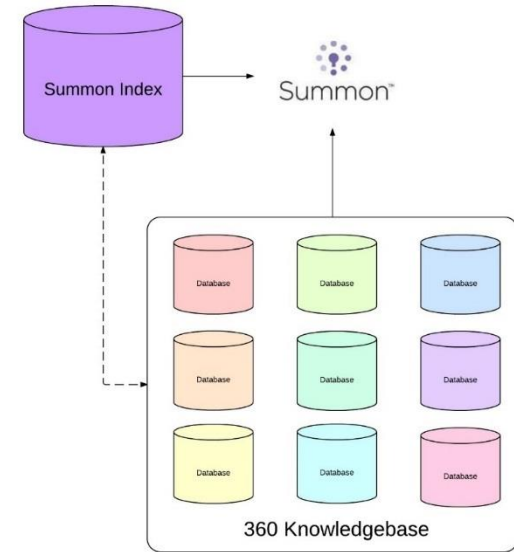
- Platform Migrations
- Database Retirement
- Improperly Defined Provider Collections

Currency

- Perform regular/routine database updates
- Automated holdings updates from select providers

How the 360 Knowledgebase and Summon Work Together for Discovery

- Summon relies upon the 360 KB to help facilitate rights access to the content that resides within the index
- Rights access is assigned by tracking a particular title by its ISSN or ISBN in 360 KB, or by assigning a Database ID (all or nothing rights)
- Summon utilizes the SSID found within the Authority Records by adding it to any records found within the Summon Index that match based on either the ISSN or ISBN
- The 360 KB also helps Summon indicate when content has full-text availability



Some of the Challenges

Metadata Quality

Lack of Consistent Metadata Standard for Discovery

Reconciling Differences between Providers for the Same Piece of Content

Provider Co-operation and/or Responsiveness

Understanding a Provider's Subscription Model for Rights and Linking

Acquisition/Delivery Issues

Volume of Content/Data

Number of Providers/Sources

To Reiterate...



2.9 Billion Records in the Summon Index



1.3 Billion Records in the Primo Central Index



29.6 Million Titles in the 360 Knowledgebase



15.6 Million Portfolios in the Alma CZ



16,500+ Full-Text Databases in the 360 Knowledgebase



6,300+ Full-Text eCollections in the Alma CZ



Over 5,000 Data Sources, including Publishers, Vendors, and Content Providers



Managed and maintained by a team of 60+ Metadata Librarians, and Content Analysts worldwide



Open Access

(A Triumph in Progress)

Another brief word from Eddie

Open Access Indicator and Filter – Beta Launch


>220 million Open Access items flagged
~75 providers

The screenshot displays a library search interface. At the top, a search bar contains the text "gravitation waves". Below the search bar, the results are sorted by "relevance" and show 124,654 results. A sidebar on the left offers filters: "REFINE YOUR SEARCH" with options like "Full Text Online", "Scholarly & Peer-Review", "Peer-Review", "Open Access" (highlighted with a red box), and "Library Catalog"; and "CONTENT TYPE" with options like "Book / eBook", "Journal Article", "Dissertation/Thesis", "Book Chapter", and "Newspaper Article". The main results area shows two items. Item 11, "Gravitational waves from resolvable massive black hole binary systems and observations with Pulsar Timing Arrays" by Sesana, A.; Vecchio, A.; Volonteri, M., is from Monthly Notices of the Royal Astronomical Society, 2009, Volume 394, Issue 4. It has an "online" icon and an "Open Access" icon (a padlock with a slash, highlighted with a red box). Item 12, "Synthetic model of the gravitational wave background from evolving binary compact objects" by Dvorkin, Irina; Uzan, Jean-Philippe; Vangioni, Elisabeth; More..., is from Physical Review D, 11/2016, Volume 94, Issue 10. It also has an "online" icon. The bottom right corner features the "ExLibris" logo.

University Library


Observation of Gravitational Waves from a Binary Black Hole Merger

Back to top

11  **Gravitational waves from resolvable massive black hole binary systems and observations with Pulsar Timing Arrays** by [Sesana, A.](#); [Vecchio, A.](#); [Volonteri, M.](#)


Monthly Notices of the Royal Astronomical Society, 2009, Volume 394, Issue 4

... and to gain insight into the relevant physical processes. Pulsar Timing Arrays (PTAs) currently provide the only means to observe **gravitational radiation from massive black hole binary** systems with masses $\approx 107 M_{\odot}$...

 Open Access

Journal Article: [Full Text Online](#)

[Preview](#)

12  **Synthetic model of the gravitational wave background from evolving binary compact objects** by [Dvorkin, Irina](#); [Uzan, Jean-Philippe](#); [Vangioni, Elisabeth](#); [More...](#)

Physical Review D, 11/2016, Volume 94, Issue 10

Modeling the stochastic **gravitational wave** background from various astrophysical sources is a key objective in view of upcoming

Summon

gravitation waves

124,654 results sorted by [relevance](#)

REFINE YOUR SEARCH

[Full Text Online](#)

[Scholarly & Peer-Review](#)

[Peer-Review](#)

[Open Access](#)

[Library Catalog](#)

CONTENT TYPE

[Book / eBook](#) (81,761)

[Journal Article](#) (36,393)

[Dissertation/Thesis](#) (2,227)


[Book Chapter](#) (1,482)

[Newspaper Article](#) (1,456)

Database Recommendations

[HathiTrust](#) (Public Domain within US only)

[arXiv.org](#)

1  **Gravitation-Wave Emission in Shifted Theories** by [Barausse, E.](#); [Yaqi, K.](#)

PHYSICAL REVIEW LETTERS, 11/2015, Volume 115, Issue 21

Gravity theories beyond general relativity predict gravitational emission by compact-star binaries sourced by "sensitivity"...

Journal Article: [Full Text Online](#)

[Preview](#)

ExLibris

What do we mean by Open?

An Evolving & Ongoing Effort

GOALS:

- Make “openly available” content discoverable (not necessarily “Open Access”)

CHALLENGES:

- Metadata quality & accuracy
- Activation, linking, proxies, frequency of updates, and more

NEXT STEPS:

- Institutional Repositories
- Digital Collections

Learn More

Central Knowledge Center

<http://bit.ly/Summon-OpenAccess>

Community Feedback Needed

Join our basecamp discussion

“Open Access special interest group”

Contact eddie.neuwirth@exlibrisgroup.com



Big data analytics – features for a richer discovery experience

Christine Stohn—
Product Manager

Enhancing discovery with intelligence from big data analytics



**Databases &
Full Text**

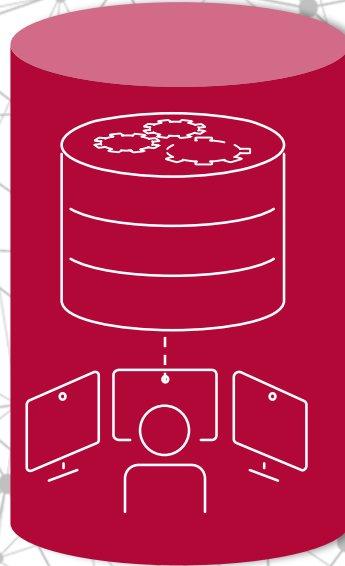


**Metadata &
Taxonomies**



Search Logs

Big Data Analysis



Enhanced searching

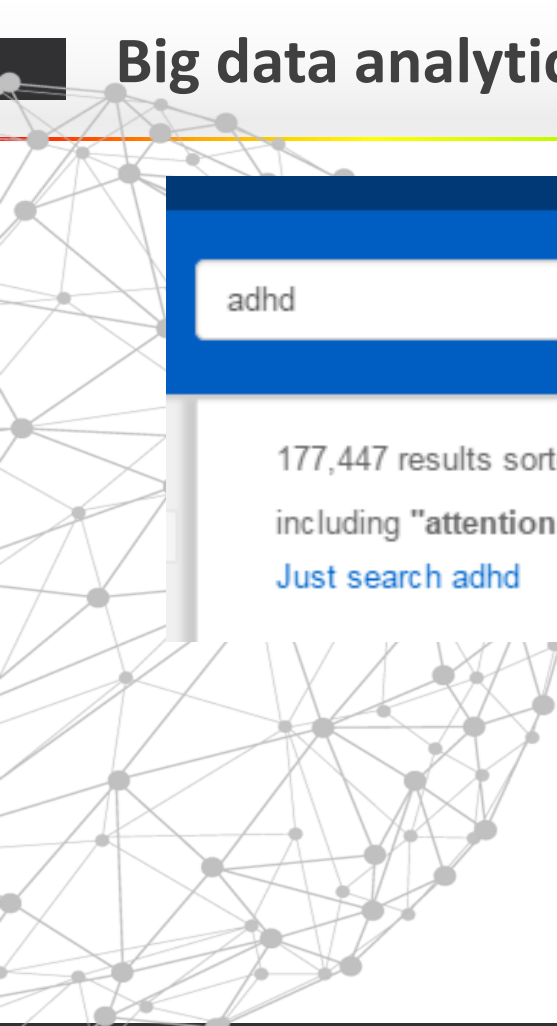



**New Research
Paths**




**Richer Learning
Experience**

Big data analytics – features for a richer discovery experience



adhd  [Advanced](#)

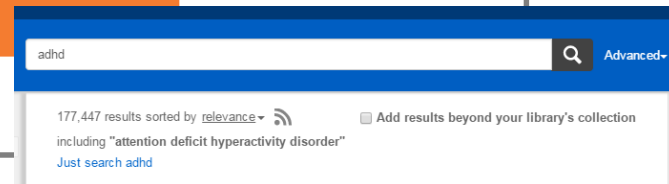
177,447 results sorted by [relevance](#)  ☐ Add results beyond your library's collection

including "attention deficit hyperactivity disorder"

[Just search adhd](#)

Big data analytics – features for a richer discovery experience

Search expansions






Citation trail


Children's social behaviour, language and
Children's Language and Behavioural, Social and
Child and informant influences on behavioral ...


NOW LISTING SOURCES CITED IN:
Teacher and observer ratings of head start children's social skills
Milfort, Roline ; Greenfield, Daryl B


Browsing through citation lists


LIBRARY SEARCHCOLLECTION DISCOVERYCITATION LINKERA TO ZSara Carr
ENGLISH


Your current citation path

 Investing in the transition to sustainable agriculture

 Transforming U.S. Agriculture


 Agroecology and Alternative Agrifood Movements in

 Agroecology and Sustainable Livelihoods: ...

 NOW LISTING SOURCES CITING:

Agroecology versus input substitution: A fundamental contradiction of sustainable ...
Rosset, Peter M. ; Altieri, Miguel A.

PAGE 1 26 Results



1


ARTICLE / multiple sources exist. [see all](#)


What Is Sustainable Agriculture? A Systematic Review

Velten, Sarah ; Leventon, Julia ; Jager, Nicolas ; Newig, Jens 2015

Sustainability, Vol.7(6), pp.7833-7865[Peer Reviewed Journal]

“ politics and policies of sustainable agriculture: Some... aspects associated with sustainable agriculture; (2) detect... sustainable agriculture is very ”

[Full text available](#) 



2

ARTICLE / multiple sources exist. [see all](#)

Agroecology and Sustainable Livelihoods: Towards an Integrated Approach to Rural Development

Amekawa, Yuichiro

Agroecology ; Sustainable Livelihoods ; Sustainable Agriculture ; Integrated Approach To Rural Development ; Small-Scale Farmers

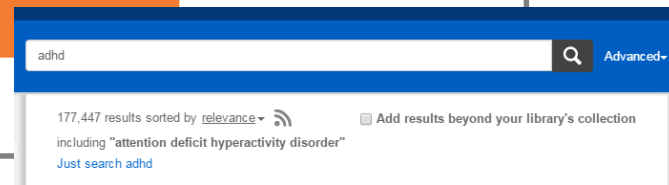
Journal of Sustainable Agriculture, 20 January 2011, Vol.35(2), p.118-162[Peer Reviewed Journal]

“ . and G. Bedi (eds.), 2002. Sustainable agriculture and... sustainable agriculture and rural development... Journal of Sustainable Agriculture, ”

Full-text not available. Click on the "View It" tab for additional options [>](#)

Big data analytics – features for a richer discovery experience

Search expansions



Citation trail

Children's social behaviour, language and ...
Children's Language and Behavioural, Social and ...
Child and informant influences on behavioral ...

NOW LISTING SOURCES CITED IN:
Teacher and observer ratings of head start children's social skills
Milfort, Roline ; Greenfield, Daryl B

bX Recommender

- bX Users interested in this article also expressed an interest in the following:
1. Ridings, Catherine M [Virtual community attraction: Why people hang out online](#) Journal of computer-mediated communication 10.1 (2004) No Pagination Specified
 2. Barrett, H. Clark [Can Manipulations of Cognitive Load Be Used to Test Evolutionary Hypotheses?](#) Journal of personality and social psychology 91.3 (2006) 513-518
 3. COUZIN, JENNIFER [Friendship as a Health Factor](#). Science 323.5913 (2009) 454-457
 4. Wood, Stephen [The four pillars of HRM: are they connected?](#) Human resource management journal 5.5 (1995) 49 - 59
 5. Tarrant, Mark [Friendship group identification, multidimensional self-concept, and experience of developmental tasks in adolescence](#). Journal of Adolescence 29.4 (2006) 627-640

bX Recommender on Primo



ARTICLE / multiple sources exist. [see all](#)

Development of a framework for knowledge translation: understanding user context

Jacobson, Nora ; Butterill, Dale ; Goering, Paula

Health Services Research; Information Dissemination; Knowledge; Information Services -- Utilization
Journal of health services research & policy, April 2003, Vol.8(2), pp.94-9[Peer Reviewed Journal]

[Full text available](#)

TOP

SEND TO

VIEW IT

DETAILS

LINKS

GET IT

CITATIONS

TAGS

Send to



EXPORT BIBTEX



EXPORT RIS



REFWORKS



ENDNOTE



EASYBIB



CITATION



PERMALINK



View It

[Full Text Options](#) >

Details

Title

Development of a framework for knowledge translation: understanding user context

Author

[Jacobson, Nora](#) >

[Butterill, Dale](#) >

[Goering, Paula](#) >

Subjects

[Health Services Research](#) >

Related reading

recommended items that are related to the record



Demystifying knowledge translation: learning from...

Patricia Martens

Journal of health services research & policy.2005, Vol. 10(4), p. 203-11

ARTICLE suggested by **bX**



A guide to knowledge translation theory.

Carole A Estabrooks

The Journal of continuing education in the health professions., Vol. 26(1), p. 25-36

ARTICLE suggested by **bX**



How can research organizations more...

John N Lavis


The Milbank quarterly., Vol. 81(2), p. 221-48

ARTICLE suggested by **bX**

bX Recommender on summon


Advanced

0





36,935 results sorted by [relevance](#)  ☐ Add results beyond your library's collection

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