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## Standards Column -- Toward an Open Discovery Ecosystem

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# Standards Column — Toward an Open Discovery Ecosystem

by **Todd Carpenter** (Managing Director, NISO, One North Charles Street, Suite 1905, Baltimore, MD 21201; Phone: 301-654-2512; Fax: 410-685-5278) <tcarpenter@niso.org> [www.niso.org](http://www.niso.org)

One of the challenges of buying complex digital content products or services is that it is often difficult to know in advance everything that is included with the product. To be fair, this was often the case in complex analog products as well. However, it seems more problematic with electronic products — perhaps because there is no “under the hood” that most of us can access easily.

The rapid explosion in digitization efforts and the reduction of costs of digital storage has made it possible to store the entire text of collections as large as the one held by the **Library of Congress** in something that could easily fit on your desktop. The problem from a user’s perspective is knowing exactly what is included when dealing with content at that scale. This is most certainly the case with the next generation of indexed library search services that have come to the market over the past few years. Each vendor has to work out a relationship with each publisher that covers what and how much of that provider’s content is included in the index and crawled regularly for updates. For a variety of competitive reasons, few organizations are willing or able to discuss what is included in their index. This problem is not limited to subscribed index services, but also exists for large search engines, such as Google, Google Scholar, Bing and Yahoo!. The “secret sauce” of each index, namely what is included, is considered a trade secret, and subscribing libraries don’t have the specifics of what they are getting.

Not that long ago, no librarian would have purchased a product where they didn’t know what was indexed or abstracted. How could a librarian know or trust what was included and whether that content met the library’s acquisition criteria, patron needs or expectations? A&I providers routinely provided detailed documentation on their databases, such as Dialog’s Bluesheets (<http://library.dialog.com/bluesheets/>), and distributed regular updates of content additions or deletions Dialog still issues Bluesheets in digital form, but most of this type of documentation has been added to the rubbish pile of former library workflow tools along with card catalogs, punch cards, and 3 1/2-inch computer disks.

The lack of knowledge about content inclusion is not the only challenge for our community related to indexed search services. Among other concerns are: How can we simplify the process of getting the sharing agreements negotiated? What protocols are available to routinely provide full levels of content to generate the index? How does one assess usage metrics on index search services? How are rights and access to be governed for these services? How

can publisher or library branding be preserved in such an intermediated context?

During the **ALA Annual Conference** in New Orleans a group of roughly 20 interested people led by **Marshall Breeding (Vanderbilt University)** and **Oren Bet-Arie and Jenny Walker (Ex Libris)** gathered to discuss issues related to indexed search service. Those discussions highlighted the problems mentioned above and other concerns of the attendees. As a direct result of that meeting, the group brought a new work proposal ([http://www.niso.org/apps/group\\_public/document.php?document\\_id=8020&wg\\_abbrev=odi](http://www.niso.org/apps/group_public/document.php?document_id=8020&wg_abbrev=odi)) to the **NISO Discovery to Delivery Topic Committee** and the **NISO** membership. That proposal was approved in November 2011, and a new Open Discovery Initiative (ODI) project was launched to develop standards and recommended practices for next-generation library discovery services. The project aims to develop and promote adoption of a consistent vocabulary regarding all the elements involved, establish some clarity in the business rules that apply to the content once indexed, and develop clear descriptors regarding the extent of indexing performed for each item or collection of content and the level of availability of the content.

**NISO** issued a call for participation in the ODI project and response was overwhelming, giving some indication of the importance the community sees in this work. The working group formed in January is chaired by **Marshall Breeding (Vanderbilt University)** and **Jenny Walker (Consultant)** and consists of representatives of libraries, publishers, content aggregators and distributors, and discovery-service providers.

Related to this project, **NFAIS** recently released a draft Code of Practice for Discov-

ery Services (<http://info.nfaais.org/info/cod-edraft1312012.pdf>) for public comment on February 1. The draft code addresses some of the business practice and policy questions related to discovery services. Among the topics covered are: contractual rights and obligations of the parties, inclusion of content, identification of content ownership, description of ranking basis, content included in the index, description of service components, and authentication. **NISO** and **NFAIS** have historically worked closely together, and this draft code of practice is being reviewed by the **NISO** ODI group. It is expected the **NFAIS** and forthcoming **NISO** recommendations will be complementary rather than overlapping or contradictory.

Another related project is the **JISC/RLUK** Discovery initiative (<http://discovery.ac.uk>). This **JISC**-funded project was launched in May 2011 to “create ‘a metadata ecology’ that will support better access to vital collections data in libraries, archives and museums and facilitate new services” within the UK. The project is focused primarily on the availability of core metadata for search and discovery based on principles of open and available metadata. While it is not specifically focused on the discovery services per se, building consistent metadata structures for cultural content contributes to strength of discovery services.

Providing understandable and usable access to digital materials is a critical service that requires the engagement of all members of our community. From the efficient distribution of quality metadata from publishers, to the unbiased presentation of search results, to the appropriate use and measurement of these services, a great deal of coordination is required. This is where organizations like **NFAIS** and **NISO** can best serve the community — by fostering community consensus about the underlying business practices and technology. 🌱

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As I thought back on the perhaps hundreds of interviews I participated in over the past 40 or so years to fill jobs in the libraries where I have worked, I fondly remembered the times when the interviewee and their resume turned out to be the same person. But I also found that often the applicant and the resume had little in common because she or he was simply so nervous that they couldn’t communicate clearly. At times I sensed that hidden in some of the people who failed the interview process were individuals who could have made a great

contribution to my library but who could not sell themselves sufficiently well to gain the support of their direct supervisors or potential colleagues. Instead, someone else got the job because they had a greater gift of gab. Clearly, for me, I can see how all of the work needed to get interviews and to prepare for interviews is worth the considerable time and energy required. I would be happy to go into further detail with those looking for a job or to put them in contact with a free center like the one at which I serve, but located nearer to where they live. Email me at <anthony.ferguson185@gmail.com>. In any event, good luck with your job search. 🌱