Library Connect Digest 2017

Elsevier’s Library Connect program thanks the librarians, information professionals and scholars from around the world who contributed to the webinars and newsletter in 2017.
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Electronic publication of scholarly literature has been a boon for academic researchers: more journals have entered the scholarly publishing landscape and more literature than ever before is available online. Conversely, searching for manuscripts and retrieving relevant results is more difficult due to the sheer volume of literature published. Biomedical researchers are faced with tens of thousands of results for imprecise searches in databases such as PubMed and Google Scholar, and often become frustrated with searches that produce too many (or too few) useful results. With these circumstances the librarian’s role on the biomedical research team has become more valuable now than ever before.

**Role of the librarian**

Librarians can conduct a wide range of literature searches in support of medical research:

A scoping search — Team members ask what literature is available on a topic of interest for new research development. The librarian may do some pre-evaluation of the results of the search to exclude obviously irrelevant manuscripts, and provide a summary of search terms, collected abstracts and, in some cases, full text results retrievable from a shared folder (in Box, Dropbox, or a shared drive) or a shared bibliographic management software library (such as EndNote, Mendeley, RefWorks).

Comprehensive background search — This search may support journal manuscript publications or grant proposals. The librarian will develop a systematic search strategy and search across several literature databases to retrieve as much relevant literature as is required by the team to provide an introduction and background for the manuscript. Abstracts and full text can be shared as described in the scoping search above.

Systematic review — Librarians supporting a systematic review will employ more rigorous systematization and documentation of search strategies. Searches are applied across several databases, but the librarian will not usually do any pre-screening of results retrieved from these searches. The systematic review team of subject experts is responsible for screening the literature results, applying exclusion criteria and establishing a body of references for the systematic review. Sharing of results is done via many platforms, including those mentioned above, but also via specialized systematic review tools such as Covidence, RevMan and others. Systematic review services are provided by many libraries.

At our institution, we have noticed a marked rise in systematic review activity by our clinical investigators.

**Expertise of the librarian**

Providing literature search support to research teams is a valuable opportunity for librarians to be involved in institutional research. The librarian does not need to have deep subject expertise in the area being investigated, but must have strong skills in literature database selection, resource evaluation and search strategy development.
It would be a budgetary impossibility for each library to hire a deep subject expert for each discipline. While subject familiarity and expertise are beneficial to understanding the “lingo” of a discipline, most libraries do employ subject liaisons who become familiar with this lingo and disciplinary needs. It has always been my opinion that librarians are often like the statisticians on a research team: we apply the skills of our trade across numerous subject specialties. Our PhD and MD faculty have deep knowledge in their fields of study, but they rely upon us to apply our knowledge of literature searching to support their own subject expertise.

This remote location presents a collaboration challenge: team members are geographically displaced from their “home” library resources, and internet connections are intermittent. Because of this disconnect from reliable access to literature databases, the team relies on shared resource libraries prepopulated with results from searches conducted by the librarian. In addition to the Bolivian Trauma Initiative, I support several other NTSI team projects. The team calls upon me to conduct searches several times a year (about 5-10 new searches a year). The results of these searches, along with PDFs of full text manuscripts, are placed in a shared Mendeley private group, organized by search topic using Mendeley’s tagging system, and shared with team members by private group invitation. This solution has proven to be a great success, since team members can access manuscripts and download them to their own computers in the few minutes they may have available internet access, and can annotate and contribute to the shared literature in the library.

Benefits of being a team member

Working closely with a research team has many benefits for the librarian. Beyond exposure to the research landscape of the institution, librarians enjoy greater visibility with the team and subsequently may receive new invitations from other teams seeking search expertise. Librarians contributing to search methodology and manuscript preparation for publications are often included as co-authors on manuscripts. Finally, the sense of satisfaction from providing needed search expertise and saving the team members’ valuable time is perhaps the most rewarding part of team participation.

Case study: Providing literature search support for geographically dispersed teams

For several years, I have provided literature search support to the Northwestern Trauma and Surgical Initiative (NTSI), a team of researchers and clinicians whose goal is to develop trauma and surgical training initiatives in the United States and abroad. Team members range in experience from undergraduate students about to enter medical school to senior research faculty at Northwestern University’s Feinberg School of Medicine. Team members are often deployed to developing countries for weeks to years to establish trauma training programs and emergency medical services.

An example of such an endeavor is the Bolivian Trauma Initiative. Bolivia’s beautiful mountains (photos above) are home to some of the most treacherous roads in the world, resulting in vehicle accidents with traumatic injuries. A goal of the Bolivian Trauma Initiative is to establish a training program for laypersons and first responders to improve survival after traumatic incidents.
Information literacy resources for librarians and their library users
SEPTEMBER 05, 2017

From EPUBs to student handouts, these information literacy resources can help bring you up to speed on the latest issues and provide support for your classroom, learning commons or research commons initiatives. Topics covered include literature search, information literacy concepts, publishing and more linking to information from CILIP, ACRL, East Carolina University and Elsevier.

Information Literacy Concepts: an open educational resource
PDF
© 2017 Joyner Library, East Carolina University
Details: 61-page PDF, CC-BY-NC-SA 4.0

CILIP Information Literacy Group
Website
Browse sections related to information literacy: blog, sectors, definitions & models, teaching, researching, further reading and the Group itself, which organizes the Librarians’ Information Literacy Annual Conference (LILAC)

ACRL Information Literacy
Libguide
A treasure trove of links on information literacy: ACRL Framework, conferences and events, sample activities and programs, and more

Literature Search: a librarian's handout to introduce tools, terms and technique
5-page handout | poster
By Katy Kavanagh Webb, East Carolina University and Elsevier Library Connect
CC-BY-NC-SA

Elsevier Research Academy website
Training and downloads to help support your early career researcher with topics such as writing, getting noticed, peer review, publishing ethics and grant applications
Knowledge discovery through text analytics: advances, challenges and opportunities

BY AKHILESH K.S. YADAV | MARCH 01, 2017

Text mining or text analytics is the analysis of unstructured data contained in natural language text using various methods, tools and techniques. It has become an important research process with applications in many different disciplines. I interviewed Gabe Ignatow to learn more about advances, challenges and opportunities in text analytics. Gabe is an Associate Professor in the Department of Sociology at the University of North Texas and co-author of *Text Mining: A Guidebook for the Social Sciences* (2016).

1. Could you tell us about yourself: research interests, publications, projects, teaching, etc.?

Born and raised in New York, I was educated in Virginia (University of Virginia) and California (Stanford University), then worked two years each in Turkey and Israel. I have been living and working in Dallas-Fort Worth for the last 10 years.

My research interests have evolved over the years, as is the case for anyone. I am probably best known for a few theoretical and empirical papers on how sociology can incorporate insights from cognitive science. But, because of my graduate advisor John Meyer and my four years abroad, I have also done work in the areas of global environmentalism, public libraries in developing countries, and globalization and religious change.

Even before graduate school I was interested in text analysis methods and have published a few papers over the years using these methods. About five years ago I decided to make text analysis/text mining the central focus of my research.

These days I’m working on three book projects, including an introductory text mining textbook, a six-author book on emerging digital social research methods, and a book manuscript on Pierre Bourdieu and digital sociology.

What can I say about my teaching? I’ve taught on all of the above topics at every level from introductory undergraduate courses to doctoral seminars. I’ve always enjoyed teaching, particularly the classroom interaction with students.

2. Could you share your experiences (reminiscence of life, learning, career, etc.) with different organizations, associations and institutions?

What a great question. The three organizations that have had the greatest impact on me are: Outward Bound (a youth organization) when I was a teenager, the University of Virginia (UVA) and the Echols Scholars program at UVA, and the University of North Texas (UNT). The Echols Program at UVA allows select undergraduates to take whatever courses interest them without regard for core requirements. For me it was the ideal program at the ideal university, and it allowed me to develop as an interdisciplinary researcher. In a very real sense I owe my career to the Echols Scholars founders and to my amazing undergraduate advisor Jonathan Haidt.

Gabe Ignatow
Assistant Professor, Centre for Library and Information Management Studies
Tata Institute of Social Sciences

More ➤
UNT is where I have worked for the past 10 years. So much has happened here that has allowed me to learn and develop as a researcher and teacher, but also as an administrator. UNT is classified as an “emerging research university,” meaning we are transitioning from a regionally oriented teaching institution to a globally oriented research institution. The transition has not always been smooth, but it has certainly been exciting to be part of an organization that is transforming itself from stem to stern.

3. You have been involved in various other roles — administrator, teacher of sociology and psychology, researcher in text mining and many more. What do you call yourself?

A sociologist. I explored other career paths before choosing sociology, and sociology quickly became my home discipline and professional identity. Of course, there are different types of sociologists doing very different kinds of work. The fact that sociology has not settled into rigid theoretical or methodological orthodoxies has always appealed to me.

4. How is text mining different from data mining? What is the application of text mining in different disciplines? How do researchers currently practice text mining?

Text mining is a form of data mining. Where other forms of data are typically organized as matrices, raw text data is “unstructured.” Simply put, text mining involves collecting and analyzing large volumes of textual data. Typically text mining is performed to learn about the groups or communities that produced the text, but its ultimate purpose depends on the field and the interests of the researcher. Social scientists use text mining tools to learn about shifting public opinion; marketers use it to learn about consumers’ opinions of products and services; and it has even been used to predict the direction of stock markets. As we discuss in the book, text mining involves multiple different tools for collecting data, as well as multiple different approaches to analyzing the data collected. These approaches include sentiment analysis, topic modeling and metaphor analysis, among others.

5. How is text mining different from Natural Language Processing?

Natural Language Processing lies at the intersection of linguistics and computer science. In the social sciences, text mining exists at the intersection of social science and data science. Text mining often makes use of Natural Language Processing tools and techniques.

6. How has text mining become so popular among industries and educational institutions?

The popularity of text mining today is driven by technology and the availability of unstructured data. I think much of the appeal of text mining is due to its low cost in comparison with other methods for gauging public opinion, and because social media and the internet generally are the central locations for all sorts of important conversations. Academic and industrial researchers are benefiting from new technologies, but our relationship to these technologies is one of being, for the most part, downstream from them.

7. Traditionally industries and businesses have employed data and text mining, but recently data and text mining have provided great opportunities for academicians to study different aspects of human/social life by applying various techniques. Can text mining play an active role in societal improvements? What is your opinion as an academician and sociologist?

Text mining techniques are powerful tools that can be used to achieve many different ends. They can certainly be used to make organizations more efficient and productive, but they can be abused as well. In our textbook we compare text mining technologies to polygraph (lie detection) technologies. It took the better part of a century for police agencies and courts to define the appropriate and ethical uses of polygraphs, and we may see a similar pattern of gradual adaptation with text mining technologies.

8. Researchers use text mining in different fields and apply different techniques to discover patterns. One subdomain of text mining is Digital Humanities, which applies tools and techniques of text mining to cultural resources to find a new pattern. In what other areas is text mining being applied?

Text mining is widely applied in social science studies of social media and new media. This makes sense given the ubiquity of these media technologies in everyday life, and the fact that it is not too difficult for researchers to access website data.
9. What are the latest technology trends in text mining that every researcher and academician should be aware of?

Everyone should know that there are many software tools available for web scraping, web crawling, cleaning data, organizing unstructured data, and analyzing data that do not require advanced programming skills. Text mining is not only for boffins. More students are entering graduate programs with programming skills, for example, familiarity with Python and R. This will increasingly allow the social sciences to make positive contributions to computer science technologies rather than always being downstream of innovations.

10. Do you think it is a big opportunity for libraries and librarians?

Given that topic modeling emerged out of library science, it makes sense that text mining tools would be used by librarians to more efficiently evaluate their collections as well as, perhaps, analyze the attitudes and opinions of library patrons.

11. What are the main challenges for text mining?

The main challenges I see are institutional rather than technical. How will undergraduate and graduate academic programs incorporate text mining into curricula? How will they provide training in these methods? The institutions that develop viable models for text mining pedagogy will be in a great position.

A second challenge I see is a need for academic publishers, especially those that publish journals, to think about some new ways of rewarding innovative text mining research. For instance, in sociology text mining papers are not exactly methodology papers because they do not develop new methodologies so much as new procedures for using existing text mining and data mining tools. On the other hand, it can be challenging to convince reviewers and editors trained in other methods of the value of text mining papers. We need a few journals and book publishers that reward innovative uses of text mining and data mining technologies.

12. Plenty of tools and techniques are available for data mining, but not text mining. Where do you think text mining is headed within the academy?

We are at the start of a revolution in social research methodology. Over the past century the social sciences have developed ethnographic research methods, focus groups, social survey analysis, network analysis and now data mining/text mining. Over the next 10-20 years I expect rapid development of both text mining technologies and of social science procedures and research designs for using them.

The current technologies are ahead of our institutional capacities and cultures. So our universities (e.g., graduate programs, Institutional Review Boards) and private and public sector organizations need to catch up if we want our students, clients, customers, etc. to be able to take advantage of text mining technologies.

Text mining will become a standard tool for academic and applied social researchers, along with ethnography, interviews, focus groups, surveys and network analysis methods.

13. Do you have a final message for academics and practitioners involved in teaching and research?

If you’re working in social science text mining I’d love to hear from you at @gabe_ignatow.

Thank you so much for the interview. LC
To librarians from a PhD researcher

BY CHRISTIAN DEFEO | APRIL 04, 2017

This article by Christian Defeo follows on from his March 16 Library Connect webinar with Eleonora Presani, “12 time-saving tips for research support.” Christian earned his first PhD (Creative Writing) from the University of Southampton in 2010, and is presently working on a second PhD (Mechanical and Manufacturing Engineering) at Loughborough University. He works for Elsevier as a Product Marketing Manager.

As a PhD researcher, the help and advice I get from my librarian colleagues is critical to my success. In 2007 when I was beginning my first PhD at Southampton, I was full of questions: How do I do a PhD? How do I organize my information? How do I properly catalog and use references? What help is available? Fortunately, the librarians had answers.

Over time the librarian’s advisory role to researchers has continued to grow in importance. The librarians at my current university have not only provided answers to my questions, they have also given me information on how to store and protect data, how to use references more effectively, and how to network with other researchers, which will help expand the scope of my studies and ensure the novelty of my work. At Loughborough, the librarians host a series of seminars for the benefit of research students to advise them on best practice; my understanding from colleagues at other leading universities is that librarians play similar roles there.

In the time since I finished my first and began by second PhD, there has been considerable evolution in the tools available, specifically, their scope and functionality. It was at a librarian-led seminar that I was advised to use ORCID; this has proven to be an ideal cross-platform resource for storing information about my degrees, research publications and job roles. ORCID now integrates with the Mendeley ecosystem. You merely need to access Mendeley via the web, log in, view your individual page and add the information by clicking “Edit” next to “Other IDs.”

Librarians also recommended I use Mendeley as a reference manager. It allows me to index, annotate and refer to documents I’ve read or will read. As I’m writing academic papers in Word, I can utilize the Word plug in to add references into the body of the text in a broad variety of formats. It can also insert a bibliography for me at the end of my document.

Mendeley’s ecosystem continues to expand. The website provides useful suggestions based on my information, including journal articles based upon the topics I’ve been reading about and academics whom I might want to contact. Additionally, I can find the leaders in my field of research and see to whom they are linked and forge working relationships. This is particularly important. Although research is often portrayed as a solitary endeavor, with the proverbial lone scientist bent over a microscope, more often it’s a collaboration between many academics sometimes on different continents. Preserving the novelty of one’s research is often a matter of teamwork.

The librarians at Loughborough have been keen to stress the importance of effective research data management. Research bodies often seek data just as assiduously as finished journal articles in return for their investment. It’s of critical importance to colleagues in the field of biological research; fortunately, there are tools like Hivebench, an electronic lab notebook that allow researchers to publish the data they acquire in their experiments. I can also store the data I acquire during my engineering studies on Mendeley Data.

Doing two PhDs has given me a unique perspective on the work of a researcher. While the research environment is ever changing, what remains critical and constant is the support I’ve received from librarians. The tools they recommend and the advice they dispense are creating the researchers of tomorrow. LC
As a professor at Lafayette College, Elaine Reynolds is well aware of the vast amount of misleading information in online sources. This impediment to accurate and efficient discovery is exacerbated by the search tools and sources she sees students using, such as Google Search and freely available yet unauthoritative pages.

At a Society for Neuroscience conference in 2014 she discussed the issue with Alistair Morrison, a librarian then working on Elsevier’s Books team. Alistair thought he might have a solution to some of her issues based on an enhancement to ScienceDirect that was under development. Intrigued, Elaine agreed to conduct pre- and post-use assessments in a 200-level Neurobiology course and a 300-level Aging and Age-Related Disease course.

She was interested in determining:

- Where students were doing their research
- Their comfort level with reading reviews and primary literature
- The frequency in which students came across unfamiliar terms
- How they handled cases where they needed additional clarity

Elaine wanted students who had completed her courses to be able to demonstrate that they could read and understand original research, including research presented in graphic form. In addition, she wanted students to be able to identify and employ a range of strategies for gathering valid information.

Assessing students’ mastery of the primary literature

Elaine began by asking her students several questions regarding their research experiences, and then compiled and charted their answers. Next she presented to them the enhancement Alistair had spoken about — ScienceDirect Topics — with several examples of how the enhanced reading feature worked and she encouraged students to use the pages in their own literature searches.

ScienceDirect Topics uses natural language processing and machine learning to link key terms within journal articles on ScienceDirect to topic pages that contain accurate definitions from published books, as well as related information.
ScienceDirect Topics uses natural language processing and machine learning to link key terms within journal articles, books, and related information.

Elaine enlisted the assistance of Ben Jahre, a research and instruction librarian, to help get the students set up with access to the articles on ScienceDirect that contained the enhanced feature. The students were instructed to use ScienceDirect Topics and their traditional research processes on other search engines for new class projects.

What she found

When polled about their experience, after taking the classes and using the topic pages, the students at Lafayette College reported a dramatically enhanced understanding and comfort level when conducting web-based research:

How comfortable are you with reading primary literature articles?

<table>
<thead>
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<th>Pre</th>
<th>Post</th>
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</thead>
</table>
| Extremely comfortable | ![Bar Chart](image1)
| Moderately comfortable | ![Bar Chart](image2)
| Slightly comfortable | ![Bar Chart](image3)
| Neither | ![Bar Chart](image4)
| Slightly uncomfortable | ![Bar Chart](image5)
| Moderately uncomfortable | ![Bar Chart](image6)
| Extremely uncomfortable | ![Bar Chart](image7)

When Elaine asked them to share some of their initial feelings about the ScienceDirect Topics tool, student responses included:

“I thought it was very helpful. I could contain my searches to the article without wasting time looking information up elsewhere.”

“…easy to digest definitions or explanations of scientific terms.”

“They made the article more clear and provided an easy way to make sure one had a full understanding.”

Elaine reports that her students gained a greater ability to curate their own research and felt an increased level of confidence when using ScienceDirect Topics. She noted that the capability to quickly navigate between journal and book content and the access to interdisciplinary research and relevant topics made the new addition a valuable tool for her students.

Learn more and explore!

Elaine described her student assessment and use of ScienceDirect Topics in the Library Connect webinar “Literature search on a connected path” on Sept. 29. The recorded webinar is available on demand and also features neuroscientist Rick Misra, who discusses the technology behind ScienceDirect Topics.

Currently there are more than 80,000 ScienceDirect Topic pages within:

- Biomedical Sciences
- Neurosciences
- Life Sciences

In late 2017 and early 2018, the functionality will be expanded to include Chemical Engineering, Chemistry, Earth and Environmental Sciences, Food Science, Materials Science and Materials Engineering.

More information about ScienceDirect Topics is available on Elsevier.com.

Explore an example topic page here or see them hyperlinked in action via this journal article: Neuropsychiatric signs and symptoms of Alzheimer’s disease: New treatment paradigms. LC
Literature search — download a helpful handout for library users in their most desperate hour

BY KATY KAVANAGH WEBB | APRIL 7, 2017

In a time when information seeking is so ubiquitous and often so poorly executed, librarians play a key role in transforming library users into information-literate lifelong learners. When convenience can trump trusted scholarly and news publications:

“This is our most desperate hour. Help me, Obi-Wan Librarians. You’re my only hope.”
— Princess Leia ... paraphrased

Literature Search: a librarian’s handout to introduce tools, terms and techniques developed by Katy Kavanagh Webb, Head of Research and Instructional Services at East Carolina University’s Joyner Library, and Library Connect can assist. “It’s not a replacement for librarian-led instruction,” says Katy, “but it can act as a calling card to introduce key concepts or as a leave-behind visual reminder to continue these best practices when we librarians are no longer in the room.”

Each page of the handout can stand alone (social media posts anyone?) or be used together as a teaching tool that covers:

• Keywords, operators and filters
• Search tools
• Types of literature
• Evaluate information
• Organize research

Download Literature Search handout (five 8.5x11” pages)

More →
Contact libraryconnect@elsevier.com if you have difficulty downloading any of the files.

Library Connect would also like to thank the Library Connect Librarians Feedback Group for their early feedback in helping to shape the handout.
WEBINAR MARCH 16 | 12 TIME-SAVING TIPS FOR RESEARCH SUPPORT
View webinar: https://libraryconnect.elsevier.com/library-connect-webinars?commid=247913

12 time-saving tips for research support
For librarians providing research instruction and services
March 16, 2017

Dr. Christian Defeo
Product Marketing Manager
Mendeley

Dr. Eleonora Presani
Product Manager
Scopus

WEBINAR SEPT. 29 | LITERATURE SEARCH ON A CONNECTED PATH

WEBINAR OCT. 19 | LIBRARIANS AND APIs 101: OVERVIEW AND USE CASES

Library Connect Webinar, #LCwebinar
https://libraryconnect.elsevier.com/library-connect-webinars
The liaison model in academic librarianship has an increased emphasis on engagement and embeddedness. It is moving away from traditional reference services and toward offering advanced research assistance and increased instruction. Shifting to this liaison model requires larger conversations on what traditional duties can be jettisoned to serve new roles and deepen existing engagement.

Establishing a new science liaison librarian position

The University of North Carolina at Greensboro (UNCG) librarians transitioned to the liaison model in 2012. At the time, there was no designated science liaison; disciplines were distributed to librarians in a variety of departments. A position was created, and I began working as the library’s first science liaison librarian in the fall of 2013. While other liaisons were still working with the same departments they had served prior to the transition, I was the first dedicated science liaison in the library. The librarians who had previously been assigned to these science departments had other full-time positions in various departments, and they did not have enough time to offer extensive services to the science departments.

Integrating library instruction into the curriculum

It is always challenging to begin a liaison position in an academic library and make connections, but especially so as the first dedicated liaison. If a department had never had library instruction, how could I create buy-in to begin integrating library instruction into the curriculum?

I started by looking at past instruction statistics to see what classes had been reached, gather a list of identified power users, and consult our list of departmental library representatives. Collections personnel can often identify which users tend to request journals and books the most often. I began by setting up meetings with any power users in a department, the library faculty representative and the department head, if possible. I brought handouts that described the services and resources I could offer as the liaison, including:

- Customized library instruction
- Assistance with research services
- Consultations
- Help with citation management tools
- Embedded assignments
- Library web guides

I did some light curriculum mapping to identify courses with the “writing intensive” marker, and asked if there were research assignments involved and if they had other suggestions for courses where library instruction might be appropriate. I then asked if I could attend the next departmental faculty meeting. At the meeting I introduced myself, talked about the services I could offer, mentioned some of the courses I thought might be appropriate for instruction, and asked the department members if they could recommend any others. I brought along the Learning Outcomes for Information Literacy Matrix (Figure A) and discussed how we use this matrix to plan our instruction sessions.
After the departmental meetings, I began by following up with the instructors of courses identified as possible opportunities for instruction and offered library instruction and custom web guides. I am not a natural salesperson; I don’t think marketing comes naturally to many in our profession, but I tried to remember everything I learned from a previous life in retail sales. I asked “When can I schedule a library instruction session this semester?” rather than “Do you want instruction?” I expected some eye rolling from faculty, but was surprised at how many took me up on my offer.

Engaging faculty outside the classroom

In addition to contacting faculty to offer instruction, I showed up where I thought faculty might be present. I attended departmental lectures and events, and the tenure recognition ceremony each year, and pursued volunteer opportunities where I had a chance to network with my departments.

The first two semesters were spent marketing and building relationships, and finding ways to offer as much instruction as possible. As I began to build those necessary relationships with faculty, I was keenly aware that I needed to nurture them as well. I was able to deepen relationships via activities, such as:

• Presented once or twice a year, and arranged guest speakers, to my liaison departments on UNCG Libraries faculty grants in information literacy partnerships with librarians
• Participated in a couple of grant applications with the biology department
• Continued to grow my instruction program, including developing special workshops that were not course-related
• Offered product demos
• Collaborated on collection development
• Helped grade final presentations for the Computer Science Senior Project class
• Interviewed each department about their data management practices and needs (Figure B)
• Served as front-line support for basic data management and other scholarly communication questions from faculty, including help with our repository (NC DOCKS)

UNCG Libraries offers many innovative services, which helped me in terms of having valuable information to share in my marketing and promotion.

Promoting and providing services to students

Along with marketing my services to faculty, I have also tried to build relationships with students. I have my own individual chat queue via LibraryH3lp that is embedded on all of my LibGuides. When I am in my office, I am logged in to answer questions. I also promote individual consultations, and after embedding the YouCanBookMe widget on my LibGuides, my consultation statistics have shot up. Next fall, I will be teaching a two credit class in Environmental and Sustainability Studies that will culminate with a backpacking trip with 16 students on the Appalachian Trail. It’s important to build a following with both faculty and students.

Sustaining your liaison services: lessons learned

On a cautionary note, I would suggest that new liaisons recognize up front that relationships and opportunities build slowly, and build upon themselves. It is tempting at first to almost over market, and if you have too many takers all at once, it can be difficult to serve everyone. In retrospect, I probably should have piloted services and grown instruction one department at a time and then assessed how scalable my program was.

If you have multiple liaison departments, you need to ask yourself how embedded you can be. The gold standard of embeddedness means increasing engagement — more consultations with students and collaboration with faculty. At some point, there are only so many hours in the week.

So I would suggest that, when building an instruction program, push a service one or two departments at a time, assess the efficacy of these services, and decide how and when to keep rolling them out. My other suggestion is for new liaisons to not feel discouraged when they encounter faculty or departments who show little interest in collaborating. This allows you to focus on the departments that are interested first.

I keep abreast of changes in departments. A course instructor might have turned me down, but the next semester, if the course had a new instructor, I’d try again. One department head had not been very receptive to instruction in the past; when a new department head came on board, I contacted him. He was very receptive to library instruction, and now I average about 10 instruction sessions each semester in this department.

Be patient, persistent and strategic. Rome was not built in a day. Build on successes and grow your program at a rate that will be sustainable. LC
University of North Carolina at Greensboro University Libraries
Learning Outcomes for Information Literacy

<table>
<thead>
<tr>
<th>Determine what information is needed and why</th>
<th>Intermediate Outcome</th>
<th>Advanced Outcome</th>
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<tbody>
<tr>
<td>1.1 Identify an information need</td>
<td>2.1 Construct a research question appropriate for the discipline</td>
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<tr>
<td>1.2 Define an appropriate research question</td>
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<td>3.1 Define the research question based on existing information; Construct a research question of appropriate scope based on existing information</td>
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<tr>
<th>Locate appropriate resources</th>
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<th>3.5 Identify subject specialist for the major field</th>
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<tbody>
<tr>
<td>1.1 Choose keywords that retrieve relevant information</td>
<td>2.3 Apply vocabulary appropriate to the discipline</td>
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<tr>
<td>1.4 Apply the search connector AND to combine keywords</td>
<td>2.4 Apply the search connector OR to broaden a search</td>
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</tr>
<tr>
<td>1.3 Select relevant books, articles, reference materials, etc.</td>
<td>2.5 Identify appropriate subject-specific databases to find relevant information</td>
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<tr>
<td>1.6 Identify appropriate virtual, human and physical information resources and services</td>
<td>2.6 Identify subject specialist for the major field</td>
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<tr>
<th>Evaluate, synthesize, and critically analyze information</th>
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<tr>
<td>1.1 Distinguish between scholarly and popular articles</td>
<td>2.1 Distinguish between primary and secondary sources where appropriate</td>
</tr>
<tr>
<td>1.2 Evaluate websites for appropriateness as information sources</td>
<td>2.2 Evaluate articles and websites for authority, accuracy, currency, coverage and objectivity</td>
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<tr>
<th>Communication information ethically and effectively</th>
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<tbody>
<tr>
<td>1.9 Communicates information from sources for a specific purpose</td>
<td>2.5 Communicates and organizes information from a variety of sources for a specific purpose</td>
</tr>
<tr>
<td>1.10 Apply the proper citation style to document sources</td>
<td>2.10 Apply the standard citation style for the major discipline appropriately</td>
</tr>
</tbody>
</table>

Figure A: UNCG’s Learning Outcomes for Information Literacy Matrix

Data Management Interviews

1. What kinds of format/data types are you using? (ie. images, spreadsheets, databases, genetic data, etc)
2. About what size are these data sets you produce? Gigabytes? Terrabytes?
3. Where do you store data during the project? How often are backups made? What methods do you use to organize the data? Where do you store data after the research is completed?
4. How long do you plan to keep your data?
5. Do your funding agencies require data management plans? (Are you involved with the generation of data management plans? If so, do you use any kind of data management plan tools?)
6. Who else assists faculty and researchers in your department?
7. Do you share your data inside/outside the institution? If so, how do you do it? If not, why not?
8. Can you describe your use of secondary data, and if you have any problems or issues that arise with that?
9. What services can the library provide? What would be the best way to promote the services we provide?

Figure B: Questions for Data Management Interviews with Departments
“A good one”: Meet Elsevier’s new VP of global library relations

INTERVIEW WITH JEAN SHIPMAN | AUGUST 15, 2017

Something I learned in my interview with Jean Shipman, Elsevier’s new vice president of global library relations, astonished me. No, it wasn’t related to her move from a leading library position to join Elsevier — in fact, she was pleasantly surprised by the positive reaction of peers and tickled by requests for introductions. It was the fact that by the age of 17 she had already mapped out her career as a medical librarian.

Growing up in a very small town in Pennsylvania, she had two main influences in her career choice: her mother, who worked in a college library, and her eldest sister, a pharmacist. Medical librarianship was a great blend of the two interests, and the lack of opportunity locally meant she could move from their tight-knit community to a bigger city without offending her mother (demonstrating an early inclination toward diplomacy). In her research she also discovered that medical librarianship was a bit more lucrative than some other types of library work (demonstrating an early understanding of funding). But she’s quick to point out she didn’t know everything:

“When I went to the library school interview and they asked what kind of medical librarian I wanted to be, I had no idea about the various roles, so I paused and said, ‘A good one?’”

From a career choice based on practical factors grew a great love for and dedication to the profession. Jean has moved across country taking different jobs to learn and grow, headed the largest medical library association to serve her peer community, and spearheaded library-publisher partnerships to build bridges and close gaps. The latter is the reason her library colleagues were not surprised by her Elsevier role.

Jean the ambassador

“When I look back at my career, this is a natural progression,” Jeans says. When she started her career at Johns Hopkins University in Baltimore she was near the National Library of Medicine (NLM) in Bethesda, and she eventually took a position with a National Network of Libraries of Medicine (NNLM) office in Baltimore, one of eight regional outreach units of the NLM. In this capacity she shared information about NLM resources with librarians in 13 states and represented the Library at conferences and exhibitions. After leaving the NNLM her support of the program continued over the years, mostly recently as the director of the MidContinental Region and the NNLM National Training Office.

She is an active member of the Medical Library Association, having served on numerous committees, and was its president in 2006-07. As president she participated in an International Federation of Library Associations and Institutions (IFLA) meeting in Korea and presented MLA’s health literacy project in Italy several years later. As a library director, she visited libraries in Ireland and Japan to share her knowledge and broaden her perspective. These experiences will serve her in good stead at Elsevier, as she plans to spend more than half her time traveling to customer sites, librarian conferences and industry meetings. She is looking forward to serving as a communications conduit between Elsevier and the library community: listening to concerns, building relationships and sharing insights from her 37 years of experience and global vantage.

This won’t be her first foray into the world of publishing. She has been a member of the Society for Scholarly Publishing (SSP) since 2007, and in 2008
joined with a group of fellow health sciences library directors (the Association of Academic Health Sciences Libraries) to form the Chicago Collaborative (CC). One of its key objectives was to improve — some would say begin — the dialogue between librarians and publishers, with an eye toward mutual education. This exposure to publishers came with some revelations. At the CC, she was surprised to hear in private discussions with smaller publishers that they credited Elsevier with R&D advancements within the industry that they all benefited from. This made her pause and reflect.

The other Elsevier

As a library director, Jean gets how Elsevier is an easy scapegoat. “I’m guilty of a little Elsevier bashing in the past,” says Jean. “It’s not so much the pricing, which on a cost-per-usage basis and cost-per-accessible-article basis is low. It’s how much of one’s serials budget goes to Elsevier. Sometimes it’s easy to lose sight of factors like the quantity and quality of the content, along with all the accompanying innovation, when you are just looking at numbers in a spreadsheet and declining budgets. But when I thought about what my researchers want, it put it into perspective. I’m definitely not saying my upcoming conversations with librarians will be easy; however, I’m not adverse to accepting criticism and being able to rechannel it into a productive discussion.”

When she shared the news about her new role, she heard from colleagues who, again in private, said that when they were having financial difficulties, Elsevier listened and did something to help them. Other companies, not so much. She reports that they are glad to have one of their own on the inside and is quick to note that she’s not the only librarian working at Elsevier.

“There are librarians at Elsevier in product development, research, sales and marketing, so it’s nice to know I’m not the only one representing my library colleagues,” Jean says. “Working alongside researchers, technologists and engineers, we can help ensure the products and platforms are informed by a deep understanding of the research lifecycle, disparate ecosystems and stakeholder challenges, including those of the library director.”

On taking risks and seeking rewards

Libraries need to demonstrate relevancy and value in a world where information is, at least seemingly, easy to obtain. “We need to raise awareness with our administration of where the information is coming from,” Jean says. “Though the access may be transparent, the connection to the library should be concrete.”

As the Executive Director, Knowledge Management and Spencer S. Eccles Health Sciences Library (EHSL) at the University of Utah, she recorded testimonials from library users regarding the role of the library in their outcomes and used them in an electronic annual report. “In practical terms, a library has a better chance of being funded if you frame funding in terms of the success of our students, researchers and educators. The budget is not for the library, it’s for the people served by the library.”

“We also need to separate the library function from the space,” she says. “They are very different and that wasn’t true before.” She envisions that more and more librarians will have dual roles and that many will become embedded in departments, while the functions of the library building will continue to evolve as well. At EHSL, she led such a change by repurposing space as an innovation and discovery center and adding roles like Innovation Librarian and Emerging Technology Librarian to support the innovation and educational transformation of the curriculum as more multi-format, engaging and immersive.

Paraphrasing a Harvard Business Review article title, “not taking risks is the riskiest move of all” sums up not only Jean’s attitude toward the profession, but to librarians as well.

Fair, fun and demanding (in a good way!)

I asked Jean to give me three adjectives to describe herself: “Fair” and “fun” came quickly, but she struggled with the third. She offered up “driven,” but I believe the word she was searching for was:

Demanding (definition from dictionary.com)

1. requiring or claiming more than is generally felt by others to be due: a demanding teacher
2. calling for intensive effort or attention; taxing: a demanding job

“Demanding” can have a negative overtone, but if you’ve met Jean I think you’ll see it’s only in the most positive light. She has worked very hard to improve the libraries and support the librarians under her direction. Like her career choice, this too was influenced by her family. Her middle sister has Down syndrome and taught Jean about working to the full extent of her abilities.

“If you are given certain talents and opportunities, it’s an honor to use them and a shame to waste them,” Jeams says. “Like my sister Patty, I want everyone to try hard and be the best they can be.”

For fun Jean plays tennis and accompanies her husband on local adventures in their small plane. He’s the pilot, but she has taken enough lessons to hopefully land the plane if required by an emergency (the Scout motto “Be prepared” comes to mind). Having left the University of Utah as an emerita librarian, she’ll stay engaged with former colleagues in social settings, including book and knitting clubs. As she’s in the process of co-editing two books, maybe her club — if they’re open to reading about health science libraries — will read one of her books soon. And though she claims to lack talent in knitting, she’s certainly not afraid to try something new.

Do you want to be an LIS journal editor?
An editor discusses perks and pitfalls

INTERVIEW WITH LUDO WALTMAN | JANUARY 31, 2017

In this Q&A with Ludo Waltman, the editor-in-chief of Elsevier’s *Journal of Informetrics* shares the typical tasks involved in the role, along with the key challenges and top rewards. Perhaps it will inspire you to explore an editorship yourself.

Ludo is a researcher in the field of bibliometrics and scientometrics, and deputy director of the Centre for Science and Technology Studies (CWTS) at Leiden University in the Netherlands.

**How is your time spent as a journal editor?**

I spend about 12-15 hours per week on my work as a journal editor. This includes the daily management of approximately 300 submissions per year, setting the long-term strategy and reaching out to new research communities. Finding a balance among all the tasks is difficult to achieve, and daily submissions have priority.

I also work with two associate editors, who handle submissions where I have a conflict of interest, and an editorial board. The board consists of 30 people who review 6-8 manuscripts per year, so you can see they are significant contributors to the journal. I revise the membership of the board every two years. They also advise me on difficult issues, long-term strategy and considerations such as acceptance rate for the journal.

On the production side, there is a journal manager and I communicate with him on production-related issues 3 to 4 times per week.

What is involved in defining a journal’s strategy?
Strategy includes looking at the scientific scope of the journal and whether to discontinue coverage of any sub-fields or add new ones. Also, we look at how the journal is organized. For example, do we maintain a single editor-in-chief or have a more distributed model with associate editors in charge of sub-fields? Lastly, I think about the promotional strategy: How do I ensure the journal is sufficiently visible and that I am accessible and approachable? What conferences do I need to attend? How will I use social media?

Are you a typical journal editor in terms of background and disposition?

At age 34 I am on the younger side for a journal editor; I was recommended for the position by the previous editor probably based on the quality of
my work not longevity. I’m a senior researcher leading a research group working on scientometrics, or measuring science, at one of the largest research centers in the field worldwide. As the journal is quite technical, my background in computer science, economics, statistics and policy are key.

I also think it takes a person who can handle stress and difficult decisions. When I turn down an article I know I’m going to disappoint someone, so I put effort into explaining why I made the decision to show I took their input seriously. Journal of Informetrics is one of the most important journals in the field and I do feel the weight of maintaining its quality.

Is scientometrics a field that attracts many librarians?

More and more librarians are using scientometric methods as their roles change and they delve deeper into the evaluation of scientific research. As scientometrics is closely related to research evaluation and research policy, I find that, outside the core scientometric community, our primary audience is science managers and policy makers.

What are the most rewarding aspects of being an editor?

The two things I find most rewarding are receiving high-quality submissions and helping to make them even better, and steering the research field in a certain direction by the decisions I make.

I think in the first few years you learn a lot, you experience the most common pitfalls and you become more efficient in managing the journal. It’s likely not something I would do for 20 years, but I feel I have definitely hit my stride and have several more productive years ahead of me as a journal editor. LC
Partnering to support grant-funded research: learn the jargon and look for needs

BY NINA EXNER | JULY 17, 2017

Grants get a lot of attention. On many campuses supporting the push for funding is of strategic importance. Libraries can support the funded research enterprise in many ways (see Exner, 2016 for some ideas) when we take the time to understand research funding and how our library skills fit faculty needs.

Librarian-led grant support initiatives can build when we:

• Learn the language of funded research
• Align grant-seekers’ needs with librarians’ skills
• Engage sponsored research professionals with specific offers of support

Learn the language of funded research

To bring our best, we need to understand sponsored research (or sponsored programs) professions such as research administration and research development. By attending Office of Research workshops, we can build our understanding of the vocabulary of grant funding. We need to listen for more than the content of the workshop; we need to listen for how they talk about grant funding. Working with sponsored research is like any other outreach in that the best liaisons learn the specialized concepts and jargon of our partners. By learning the vocabulary, we are able to speak to faculty and sponsored research about funding in a way that resonates with them.

We can also listen for opportunities. Imagine being at an Office of Research workshop where they discuss sharing learning objects as a research output from a science education grant. A librarian could bring up Open Educational Resource preservation in open access repositories, combining their needs with our know-how.

Align grant seekers’ needs with librarians’ skills

This combination is quite natural as the grants context overlaps a lot with the library context. Grant data management is a great example of how description, preservation and data skills combine to support grants. And data management is high profile in current US grant support. But many other areas also connect with grant support. Scholarly communication, classification and metadata, interdisciplinary search skills and preservation expertise all have value in supporting the funded research enterprise. By combining knowledge of the funded research enterprise with librarian expertise, we can confidently reach out to research professionals with offers of assistance.

Engage sponsored research professionals with specific offers of support

Once we understand the terms and opportunities, it is time to approach the Office of Research and departmental research administrators in our subject departments with offers to partner on research projects. This works best when we pitch specific services to our partners. Avoid open ended “How can I help?” questions, because non-librarians do not understand the skills we can bring.

Instead, start with an offer to train researchers on developing data management plans or building strong publication track records. Whether or not they agree,
follow up by asking what some key challenges and needs are for their faculty. Listen to those needs; there may be areas where the library team can help!

Another avenue of approach is to investigate funders relevant to our campuses. We can search for videos or presentations about their application, peer review or merit review processes. With this understanding, we can design programs to apply library expertise to improving faculty grant applications. For example, if the funder wants grant proposals that prove they have a good research approach, we start by searching for information on how they define the research approach. That information helps us to structure a program on literature reviews for finding articles that prove the research approach. Then we can go to the Office of Research with a lesson plan like, “Strategies for Literature to Support the Grant Research Approach Section.” The Sponsored Research team will be better able to understand how the library’s services fit with their needs! Moreover, it gives us a better idea of what our faculty need to successfully get funding.

It takes time

Grant support initiatives can build when we learn the language of funded research; align grant-seekers’ needs with librarians’ skills; and engage sponsored research professionals with specific offers of support.

It takes time to understand how the research infrastructure works. But the benefits are worth the time. Connecting the library more closely to funded research makes it even clearer how we academic librarians support the whole university community.

Reference

Medtronic Knowledge Center redesign a sign of collaborative spirit and company support

INTERVIEW WITH TRACY HARMON, EMILY KALLEVANG AND MEGHAN TUROK, MEDTRONIC
| OCTOBER 9, 2017

Earlier this year the Medtronic Knowledge Center refurbished its space with a collaborative spirit. The high-ceilinged room off the main lobby of its headquarters in Minneapolis, Minnesota now opens onto high-top tables with built-in technology so information professionals can work with local and virtual teams on solving their information needs. A map of the world, three clocks showing global time zones, and a snippet from the company Mission statement are visual signposts indicating that the Knowledge Center supports a global workforce.

In addition to the workspaces, employees can have a change of pace in comfortable armchairs positioned next to a selection of literature where employees have published or that are relevant to their work. Office cubes have been moved over the tracks on the floor — the only thing remaining of the physical collection — indicating how the Knowledge Center’s reach has expanded to a truly global audience. As guests enter, they now see a collaborative and welcoming space.

“An executive leader came in recently with one of our founders to show him the space,” says Meghan Turok, a senior technical information specialist, with a gleeful note. “That wouldn’t have happened before. Now we’re a highlight on the corporate tour!”

Key initiatives of the Knowledge Center

At Medtronic, the Knowledge Center is a centralized function serving global technologists, healthcare professionals, engineers and others. It ties heavily into the section of the Medtronic Mission that emphasizes the importance of continuous learning and knowledge assimilation under three main initiatives:

• Library — The library encompasses literature subscriptions and professional research. Clinical, technical and business information are all available through the Knowledge Center website to provide employees with the information they need to discover, learn and support making good decisions.

• Technical development and engagement — The focus here is on employee learning and leveraging internal knowledge. The Knowledge Center energizes the Medtronic technical community by providing opportunities to learn, connect and engage. Through partnerships with technical leaders and societies, they deliver events, education and recognition that foster the internal collection and sharing of knowledge.

More
• Knowledge management and collaboration solutions — This initiative is about connecting people to people and people to information. The Knowledge Center supports an internal social networking platform called MIx (Medtronic Information Exchange), where employees can join online communities, share what they are working on, and find out what others are doing and what's happening with the company. One flagship community, sponsored by the Knowledge Center, is Ask Medtronic. It encourages employees to ask and answer questions from across the globe.

“I don’t know of many companies that put as much energy and time into resources that successfully connect people internally as Medtronic does,” says Meghan. “But working this way pays for itself many times over.”

Inviting people in

“Early in the transition from paper to digital the company was going through some challenges,” says Tracy Harmon, the library operations manager who has been at Medtronic for 13 years. “The Knowledge Center had to limit its ability to be open and available to employees. As we came through that transition, we became more strategic, gaining credibility and leadership support. This increased the demand for our resources and allowed us to have a greater impact within the organization.”

Now positioned to span the organization, Knowledge Center employees serve on many councils and committees, and partner with the various business units and functions. They are deliberate in their outreach and are seen as a central hub for employees’ information needs.

In May the Knowledge Center hosted an open house inviting Medtronic staff to come visit. The event highlighted the redesign and provided an opportunity for individuals to discuss and learn from information professionals, and discover how information can add value to their projects. It also included information about in-person and online trainings as an incentive to come visit, start using the resources and work with Medtronic information specialists on meeting business critical goals. As a result of higher demand for information, the Knowledge Center is being requested to extend globally. They are actively sharing and educating employees on best practices, gaining insight into the company’s diverse information needs.

Reflections

“We are so grateful. Not only for the redesign but for the space itself and the affirmation that we have upper-level support,” says Emily Kallevang, a senior technical information specialist. “This is prime real estate and I can’t imagine it being used for any better purpose than to fuel innovation, collaboration and exploration here at Medtronic.”

Asking whether they had any advice for their information professional peers based on their successful space redesign and the backing it shows, Tracy, Meghan and Emily outlined the following:

Five tips on getting support for your library

1. Don’t give up! Have your messages ready that articulate how your work is strategic and business critical so as you are building relationship with leadership, you can advocate for space and resources that demonstrate your value.

2. Support the whole organization: Customize your space using brand colors to align to the culture of the company.

3. Commit to collaborate: Invite people in to work with you and go outside the library to bring them in. Have collaborative workspaces with virtual options to meet employees where they are and to foster intersections of work groups interested in diverse information topics.

4. Diversify your initiatives: Take advantage of the skills of your library staff and extend programs beyond providing information resources to leverage knowledge and expertise.

5. Share your success: Regularly communicate with executive leadership and employees. Share how you have helped achieve the strategic initiatives of the organization.

LC
WEBINAR MAY 18 | HIGH-IMPACT LIBRARY SERVICES AND OUTREACH


High-impact library services and outreach:
Student success ◇ Systematic reviews ◇ Scholarly communication

Library Connect Webinar | May 18, 2017

Katy Kavanaugh Webb
Assistant Professor | Head, Research and Instructional Services
J.Y. Joyner Library, East Carolina University

Donna Gibson
Director of Library Services
Memorial Sloan Kettering (MSK) Cancer Center

J. William (Bill) Draper
Reference Librarian, Biddle Law Library
University of Pennsylvania Law School
Librarians play a critical role in helping faculty members and researchers understand the impact of their work. With the rate of change of technology, products and metrics, this job can feel overwhelming. The Research Assessment Metrics Timeline clearly tells you that you are justified to feel that. But, it also tells you how we got where we are, and that understanding can serve to “decomplicate” things and help you move forward.

Spanning seven decades, the Research Assessment Metrics Timeline looks at pivotal events from Eugene Garfield’s introduction of citation indexing to the creation of 88+ million DOIs. Following are some key takeaways that we had while working as a team to develop the timeline.

Sharing research

At Plum Analytics, we had been working on item-or article-level metrics for five years. It became obvious that advancements in technology enabled us to do the powerful work of gathering and analyzing metrics. That got us curious about how research metrics, analytics and products aligned with technology changes over time.
Librarians play a critical role in helping faculty members and researchers understand the impact of their work.

Mosaic (an early internet browser) was introduced in 1993. From there important changes start to happen at an accelerated rate — in particular, new ways to share research. Once research is shared, you can start to capture and analyze metrics about how people are sharing and talking about it. Examples of this include whether or not the research was mentioned in a news report or blog post, or whether it was downloaded or saved. If you understand and analyze article-level activity, you can start to tell interesting stories about the research.

Librarians have an opportunity to be on the front lines of new ways to help faculty and researchers tell these stories. Librarians are starting to use article-level metrics to help researchers, especially early-career researchers, with their promotion and tenure files, grant applications and researcher profiles.

In another sharing example, we were surprised to learn preprint repositories such as arXiv (1991) and SSRN (1994) were established before the internet had become ubiquitous, pointing out that researchers have long desired to share their research findings. Now dozens of such services are either in production or planned.

Identifying research

Another insight occurred when we noticed that advances in measuring research came hand-in-hand with the ability to identify that research. That is why we included the introduction of identifiers such as PubMed IDs and DOIs. More recently ORCID iDs are being championed through the library as a means to identify researchers and connect them to their research. (Learn more about introducing ORCID iDs and other research metrics topics at the June 8 Library Connect webinar, Researcher Profiles and Metrics That Matter.)

Looking ahead

Our primary goal in creating the timeline was to look back at how research and metrics have evolved over the last 50+ years, but we also wanted to take a peek into the future. Funders are starting to demand more evidence that the research they are funding is having an impact.

Additionally, some research, such as translational or clinical research, is at a disadvantage when measured by traditional citations. The former includes research that translates basic scientific discoveries into clinical or policy recommendations. The latter is written by clinicians in medical practice about what works in that arena. With today’s technology and products, it is possible to discover non-traditional areas where this research is referenced or cited. For example, an article on the most successful treatments of heart disease may be referenced in a PubMed Clinical Guideline. This citation is not picked up in traditional citations indexes, but helps tell a story of the impact of that research. This applies to policy as well. Many governmental and non-governmental organizations publish public policy documents on topics ranging from agriculture and farming to urban issues. When these policy documents reference research it demonstrates a deep-level of societal impact. At Elsevier, we believe measuring these clinical and policy citations is an important part of the future of measuring research impact.

I’m eager to see what other advances technology combined with human ingenuity, or perhaps even machine learning, will bring!

1. A former colleague, Tom Crosby, worked with me to develop much of the content. Other contributors to the timeline include Andrea Michalek, Talia Arthur, Christopher James, Rachel McCullough and Taylor Stang.

2. In early 2012, Plum Analytics was founded with the vision of bringing modern ways of measuring research impact to individuals and organizations that use and analyze research. In 2017, Plum Analytics joined Elsevier.
Editor’s Note: This article was originally published on March 17, 2017, on the Galter Health Sciences Library & Learning Center website. The CiteScore metrics 2016 were announced on June 1, 2017 and are freely available at https://journalmetrics.scopus.com.

Journal-based metrics can help determine the overall quality of a communication channel. A key metric for many years has been the Journal Impact Factor by Clarivate Analytics (formerly Thomson Reuters). In December 2016, Elsevier introduced a comparative metric called CiteScore, which is part of a family of journal-based metrics.

How is it calculated?

The 2015 CiteScore is calculated by dividing the total number of citations in 2015 to documents published in the 3 previous years, by the number of documents published in those same 3 years.

How does CiteScore differ from Journal Impact Factor?

Though CiteScore is similar to the Journal Impact Factor (JIF), the two differ in some key areas:

**Timeframe:** The JIF counts documents (in denominator) and citations (in numerator) over a 2 year period, whereas CiteScore uses a 3 year timeframe. Elsevier explains that the wider citation window allows for a fairer evaluation of all fields, including those that take longer to accumulate citations. Clarivate Analytics would point to their 5-Year Impact Factor in response to this, which is included in the Journal Citation Reports.

**Citable items:** Both the JIF and CiteScore cast a wide net for their numerator by counting all the citations made to a journal title. However, they differ greatly in what they include in the denominator. JIF counts only documents published in the journal that are considered substantive and scholarly — namely articles, reviews and proceedings papers. Whereas, CiteScore counts all document types in the denominator, including editorials, letters to the editor, etc. Journals that have more diversity in document types (i.e., fewer articles and reviews) are more likely to have a lower CiteScore when compared to JIF.

**Comparison:** Below is a side-by-side comparison of several top journals based on JIF. For example, the high impact journal JAMA, has a JIF of 37.68, and a CiteScore of 6.75 in 2015.
**Timely Release:** Both the JIF and CiteScore are based on data from the previous full year (i.e., we’re currently working with 2015 data for both JIF and CiteScore). Official scores for 2016 for JIF will be released in the summer, and CiteScore in the spring. However, CiteScore keeps up a CiteScore Tracker which calculates the current year’s scores on a monthly basis prior to the official upcoming release.

**Availability:** CiteScore is made freely available (see here), while Journal Citation Reports is available through subscription. Galter Health Sciences Library provides quick access for our library users to both from our website.

**Range:** In 2015 there were almost twice as many journals with a CiteScore (22,044 journals) when compared to JIF (11,985 journals).

**Review of Quality:** Both Elsevier and Clarivate Analytics have an ongoing journal evaluation process (see Elsevier’s here, and Clarivate’s here and here), though it’s difficult to tell how much they differ in their methods.

### Further information


- Waltman, L. Q & A on Elsevier’s CiteScore metric. Available from [https://www.cwts.nl/blog?article=n-q2y254](https://www.cwts.nl/blog?article=n-q2y254)


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<td>2</td>
<td>2</td>
<td>New England Journal of Medicine</td>
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<tr>
<td>3</td>
<td>168</td>
<td>Nature Reviews Drug Discovery</td>
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<td>The Lancet</td>
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<td>1673</td>
<td>PLoS One</td>
<td>3.057</td>
<td>2.32</td>
</tr>
</tbody>
</table>

**Is there room for CiteScore?**

Some have argued that CiteScore is subject to potential conflicts of interest because Elsevier also publishes a significant number of journals (approximately 1,462 journals) that are ranked by the metric. Others have suggested that including all document types in the denominator acts as a disincentive to journals in publishing a diversity of materials and lowers the quality of the metric. While these are appropriate concerns, there’s also the practical need to measure journal quality. CiteScore’s impressive range means that even more journals (which have gone through a quality selection process) receive a score that helps us evaluate their work.

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[https://libraryconnect.elsevier.com](https://libraryconnect.elsevier.com) | [www.facebook.com/libraryconnect](https://www.facebook.com/libraryconnect) | [https://twitter.com/library_connect](https://twitter.com/library_connect)
**CiteScore™ metrics resources for LibGuides**

**BY COLLEEN DELORY | JUNE 11, 2017**

Are you interested in learning more about CiteScore metrics and then sharing that information with your researchers or other librarians and information professionals? The Scopus Team has put together some great resources that you can link to or download and use within your LibGuides, instruction, blogs and other outreach activities.

**Background articles**

- CiteScore metrics updated with 2016 annual values (Elsevier Connect)
- Keeping score of CiteScore (Elsevier Connect)
- Controversial impact factor gets a heavyweight rival (Nature News)
- CiteScore: a new metric to help you track journal performance and make decisions (Elsevier Connect)

**Where to find CiteScore metrics — website links**

To use search and filter features and to explore the full range of associated CiteScore metrics for a group of journals, such as open access journals or a specific subject category, visit https://journal-metrics.scopus.com

To interrogate the metrics and underlying data for a specific journal of interest, visit Scopus

**Tutorial and background video**

Link to a six-minute CiteScore metrics tutorial on the Scopus research metrics information site page.

Embed an animated four-minute video to share CiteScore 2016 background information with your users.

**Factsheet**

The updated four-page factsheet contains information about the eight indicators in the CiteScore metrics family, plus the two golden rules for research metrics and graphics with key CiteScore data points.

**Infographic**

The one-page PDF (shown at top of this article page) is a nice visualization for your LibGuide, containing information about number of titles, top newcomers, highest metric scores, number of disciplines covered and more.

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Scopus blog posts

The Scopus blog has posted several terrific how-tos about CiteScore metrics, including:

- How to explore, compare and track journal citation impact with CiteScore metrics
- CiteScore Tracker: Keep current with how a title’s CiteScore is building each month
- CiteScore Revealed: More transparency, more clarity

Link to all Scopus blog posts tagged with CiteScore metrics.

Quick Reference Cards for Research Impact Metrics

See CiteScore metrics in the context of a number of author, article and journal metrics. Download a poster featuring 14 metrics, larger format cards and a PowerPoint presentation.

Download poster & cards >

Sample CiteScore metrics LibGuides

Arizona State University — http://libguides.asu.edu/citation/citescore

The Hong Kong Polytechnic University — http://libguides.lib.polyu.edu.hk/journalimpact/citescore

WEBINAR JUNE 8 | RESEARCHER PROFILES AND METRICS THAT MATTER

Researcher profiles and metrics that matter
June 8, 2017

Chris Belter
Bibliometrics Informationist
National Institutes of Health Library

Andrea Michalek
Managing Director of Plum Analytics
Vice President of Research Metrics, Elsevier

Ellen Cole
Scholarly Publications Librarian
Northumbria University

WEBINAR NOV. 16 | ELEVATE THE STATUS OF YOUR LIBRARY WITH DATA VISUALIZATIONS AND MULTIMEDIA MESSAGING

Elevate the status of your library with data visualizations and multimedia messaging

Todd Bruns
Institutional Repository Librarian
Eastern Illinois University

Dudee Chiang
Senior Technical Librarian
NASA Jet Propulsion Laboratory

Jean P. Shipman
Vice President, Global Library Relations
Elsevier
Scholarly communication issues around scholarly collaboration networks

BY COLLEEN DELORY | OCTOBER 25, 2017

With Facebook at almost two billion monthly users, it’s safe to say most of us are familiar with the functions of an online social network. Professional counterparts, such as LinkedIn, allow us to present our career qualifications to the world at large, especially to potential employers. Scholarly collaboration networks (SCNs), such as Mendeley, Academia.edu and ResearchGate, are an interesting blend of social and professional with elements of see and be seen, and tools for managing research.

Though they are sometimes called “academic” social networks, SCNs are used by a wide audience of researchers and scholars both within academia and beyond. With the rise of SCNs, librarians need to understand the role of these networks in the research lifecycle, the key issues involved and how to incorporate SCNs into scholarly communication models and instruction and outreach activities.

Also before dedicating time and resources to SCNs, librarians should consider their sustainability and place in the scholarly ecosystem. In its February 2017 report “The Scholarly Collaboration Network Landscape,” the research and advisory firm Oustell noted, “Eight years after the launch of the Big 3 SCNs [Academia.edu, ResearchGate and Mendeley], it’s time to start optimizing these services to generate profits. Investors have been generous, but in the case of ResearchGate and Academia in particular, they’ll be looking for an exit in the short-to-medium term and will want to see significant return on investment.” Conversely, they note that Mendeley is part of a greater researcher offering from Elsevier, which is looking to cement Mendeley’s place as a market-leading and sustainable collaboration platform.2

In exploring the intersection of scholarly communication and SCNs, I will use Mendeley as my example as this is the SCN I’m most familiar with, but the same inquiry and advice can, and should, be applied to any SCN you plan on supporting.

Features of a true scholarly collaboration network

A true scholarly collaboration network must offer a platform for researchers to connect, communicate and collaborate. Such a platform should include features such as:

- Follow — to stay up-to-date with others’ work and for others to keep up with your work
- Disseminate & discover — to share and seek information, including early feedback on your work and commenting on others’ work
- Profile — to build an accurate, searchable profile to ensure others find you and your work
- News — to receive alerts when new content, personalized to your interests, is available
- Private groups — for research teams and study groups
- Public groups — for discipline-specific news and topic discussions

Before committing resources to understanding and promoting SCNs, librarians should ensure the SCN offers the features their users’ want and need, and that it operates in an ethical manner, e.g., respecting copyright (see Copyright and SCNs section below) and being transparent in communications.

More ➤
From collaboration to impact

Researchers want to understand the reach and impact of their work; SCNs can help. Most SCNs offer some sort of article-level tracking (made easier through integration with the ORCID researcher ID and Scopus author profile). For instance in Mendeley this includes the number of Mendeley users who have added the researcher’s publications in their personal library, downloads from ScienceDirect, and citation metrics from Scopus.

Metrics may be a critical feature for researchers in fields where citations develop slowly. Article-level metrics from SCNs are starting to be included in promotion and tenure files, grant applications and on various online profiles.

Copyright and SCNs

As SCNs have evolved, so too has the need to address issues of copyright. Librarians are embedding information about responsible article sharing with instruction about copyright, fair use and the integrity of the scholarly record. The publisher of the article of record — from university presses to niche publishers to publishers with large portfolios — ensures the work is authoritative, trusted, preserved, discoverable and accessible. The good news for librarians delivering these messages is that researchers want to respect copyright. In a 2017 survey on SCN usage, 83 percent of authors agreed or strongly agreed that copyright should be respected (survey by Kudos and 10 publisher partners; April 2017; n = 5,513). The challenge for librarians is to get the message across so that copyright is easy to understand and sticks. In a presentation to faculty, librarians at the University of Rhode Island outlined the contradictory language of some SCNs about uploading and sharing articles without being clear on copyright issues, while shifting copyright violation liability to users in the fine print.

“The best defense is a good offense” is an adage that comes into play here. Librarians can help protect their researchers by educating them on a few important facts regarding SCNs and responsible sharing:

- ResearchGate, Academia.edu and Mendeley are all owned by for-profit organizations.
- Researchers can share the final published version of an article in a private group on an SCN, such as Mendeley, that has signed the STM Association’s “Voluntary principles for article sharing on scholarly collaboration networks.”
- Sci-Hub, LibGen and some SCN websites are becoming open repositories of copyrighted material. They are not only jeopardizing scholarly publishing, but in many cases are breaking the law. (Mendeley does not violate copyright as it follows the STM voluntary principles for article sharing on SCNs.)
- Researchers can always share their preprints and provide the DOI for the final published article.

The STM Association drafted “Voluntary principles for article sharing on scholarly collaboration networks” with input from the wider research community, including librarians. These can be found on the homepage of the How Can I Share It? website and are available in English, Chinese, French, German, Japanese, Portuguese and Spanish. A key principle is that final published articles may be shared in private groups. The How Can I Share It? website also enables authors to search for an article’s access and usage rights by DOI.

Other new tools like Unpaywall are being introduced. This site allows researchers to search for the best available version that can be shared without violating copyright, e.g., a preprint or accepted manuscript post-embargo. Libraries can also integrate publisher APIs with their institutional repositories to meet funder requirements regarding article sharing, and to provide access to the best available version depending on the library’s subscriptions.

For more information at a publisher and journal level about rights and permissions, the SHERRA RoMEO website “aggregates and analyses publisher open access policies from around the world and provides summaries of self-archiving permissions and conditions of rights given to authors on a journal-by-journal basis.”

*The best defense is a good offense* is an adage that comes into play here. Librarians can help protect their researchers by educating them on a few important facts regarding SCNs and responsible sharing:

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- Researchers can always share their preprints and provide the DOI for the final published article.
The black hole of usage

In a June 2017 Scholarly Kitchen post, the journals director at the American Society of Civil Engineers commented, “When papers are downloaded from Sci-Hub and the associated LibGen database, the publisher site loses the download counts. Now, the same can be said for all the papers in ResearchGate, Academia.edu and institutional repositories.” In the case of institutional repositories, librarians are able to access the data and combine it with usage numbers from publishers, but when SCNs do not share their usage numbers, this black hole of data hurts librarians.

Librarians factor usage data into decisions about their budget allocations and collections, and in more recent years, to prepare institutional and departmental level reports on research outputs. The more fragmented usage data becomes, the more difficult it is to develop a cohesive and comprehensive picture of research impact.

Information literacy and beyond

Librarians are teaching their researchers, faculty and students about SCNs. As with many things, self-education is key. After you become fluent, it’s much easier to implement other tactics to familiarize or raise awareness among library users about an SCN, such as:

- Establish your own profile and offer resources there
- Create a LibGuide
- Offer a workshop or bootcamp
- Set drop-in hours for SCN topics
- Identify and use platform experts
- Embed SCNs in other research lifecycle topics and training
- Share results of a literature search or systematic review in an SCN group

The benefits to using and promoting SCNs are numerous. Don MacMillan, a University of Calgary librarian, sums it up nicely:

“For librarians, besides being a powerful tool for their own research, Mendeley serves as another point of engagement with other faculty and students. Developing fluencies and expertise with resources like Mendeley we may be better able to make connections in senior classes, offering something besides bibliographic searching; it may be a way to work with research teams on campus; it may offer a different perspective on how well the library’s collections match the needs of the institutions’ researchers, or the impact of researchers’ work. In any case it is another way for the library to add value to the institution.”

References


Embedding ORCID in researcher workflows and institutional systems

BY ELLEN COLE | OCTOBER 17, 2017

I would like to share some tips about how we are ensuring ORCID adoption in researcher workflows and institutional systems at Northumbria University. Our scholarly publications team, with one librarian (me) and two full-time equivalent library assistants, provide support for anyone considered research active at Northumbria, largely our 5,000 postgraduate students and 1,385 faculty (what we would refer to as “academic staff” in the UK). We are very focused on growing our research activity, both in terms of the quantity of research we produce and the quality of that research. With use of the ORCID iD, we can better ensure we are capturing this growth. Here are a few strategies we have found to be not only successful, but sustainable.

1. Sell the benefits of ORCID to the individual, not the institution.

We let our researchers know that, as a unique identifier, an ORCID can ensure they receive proper attribution — and thus credit! — for their research publications and other outputs. We tell them to sign up for an ORCID as they are the owners of their scholarly record and their ORCID will stay with them for the length of their career, wherever they may study or work. They understand that it is much more convenient for them to sign up now than to do it later and have to retrospectively populate their ORCID record.

2. Include the ORCID message in other training.

We integrate ORCID into our existing library and research skills training programs that cover open access, research metrics, managing your online identity and promoting your research, among other topics. In this way, we will likely expose individuals to ORCID at least once and hopefully multiple times as they attend more training.

3. Be visible.

We also started to promote ORCID at other university events, such as our annual research conference for faculty and postgraduate research students. We set up a booth in the circulation area with a couple of laptops and talked to people about ORCID, registering them on the spot if they were interested. At that particular event, we had over 100 new registrations! We also put up ORCID posters in our research workspace at the library and sent flyers out to faculty.

We spoke to our research committees about ORCID to listen to any concerns they might have and eventually get their endorsement. We could then speak to their faculty with the research committee’s backing, or better yet, have them cascade information to their colleagues.

We let our researchers know that an ORCID can ensure they receive proper attribution - and thus credit!
4. Embed ORCID in internal systems.

We included a field for the ORCID iD in our student record system (SITS). We have just developed a new research portal in SITS to bring all aspects of paperwork relating to a PhD onto an online system from project approval to submission for examination. One aim was that students would not be able to pass and receive project approvals in first year without having an ORCID in the system (if they did not object to registering for any reason).

We then continued to roll this out to students who were farther along, e.g., a final year student cannot progress to examination without an ORCID or at least having a conversation with their supervisor about why they are choosing not to include in ORCID.

We are preparing for the likelihood that our national impact assessment, the Research Excellence Framework, will start requiring ORCIDs from our faculty. Therefore, we are including ORCID as a field within Pure, the current research information system we are implementing at Northumbria. It holds our information about publications, grants, postgraduate supervision, and even human resources data for our faculty.

We also added ORCID as a secondary identifier in our EPrints institutional repository. This was long before there was an EPrints plugin that authenticated the ID or could pull in publications from the ORCID profile. It was just a very simple way of us being able to store an ID in a university system.

5. Have a clear point of contact at the library for queries about ORCID.

With such a small team in this size of university, we have to work very closely with other support services, whether that is our Research and Innovation Services, the Graduate School, Planning or other teams in the library, such as Skills Development or Collection Management. We try to get as many people as possible talking about ORCID, but we find it does help to have a single point of contact, particularly if you are asking people in other areas of the university to embed ORCID in their training. They need to know that they have one person to come back to who knows exactly what is going on in all areas of the university and that they will be able to get their questions answered. LC
Six examples of creative promotion of ORCID by libraries

ALAINNA THERESE WRIGLEY  | OCTOBER 17, 2017

Historically the library has led the way in engaging researchers around the use of search and discovery tools. The library has also been a strong advocate for ORCID among researchers, providing clear information about the benefits of having an ORCID iD and training in how to register and use an iD to make connections with works and affiliations.

Through our interactions with our members and regional workshops and webinars, we learn about effective engagement strategies. We share here six examples of creative ORCID promotions by librarians from around the world and provide links to resources to support your own programs.

ORCID integration outreach campaign, the University of Newcastle displayed on all staff computers an eye-catching screensaver promoting ORCID registration and their ORCID integration. The screensaver bolstered other engagement activities in the campaign including newsletter articles, presentations for each faculty and updated LibGuides.

Cookies and banners at the University of Minnesota Library’s ORCID pop-up booth. Source: University of Minnesota Library, @umnlib

Attracting students with tasty cookies

For early career researchers, having an ORCID iD — and knowing how to use it — is an important means to distinguish their work and clarify their affiliation. It also enables them to reduce workload when making submissions to funders, publishers, or even thesis or dissertation review committees.

The University of Minnesota used a tasty tactic to attract research students to their ORCID pop-up booth during graduate orientation: cookies! Researchers registered for an iD, learned how to use their iD, and left the booth with a delicious cookie.

A frequent request at our ORCID roadshows is a 3D printer design for an ORCID iD cookie cutter. We’re working on making this a reality — watch the ORCID blog for details.
ORCID banners featuring researcher testimony

Librarians share that one of the most effective ways to encourage researchers to get ORCID iD is hearing how their peers have benefitted from using their ORCID iD when connecting to their institutions and other systems. Bond University Library Services created pull-up banners for their ORCID pop-up booth at this year’s Research Week. The banners feature from two fields, law and medicine, and statements on how they benefit from using their ORCID iD.

Targeting researchers outside the library

Visual materials that researchers can display in their own spaces are an excellent engagement tool. Librarians at the University of Tennessee, Knoxville and University of Texas at Arlington have provided researchers who have an ORCID iD with a hanger to display on their office door, cubicle wall or other location.

Pull-up banners for Bond University Library Services’ ORCID pop-up booth. Source: Bond University Library Services

Door hangers created by University of Texas at Arlington Libraries. Source: University of Texas Arlington Libraries

More
Customized iD mugs for ORCID pilot participants

Many researchers know that creating an ORCID iD is fast and easy, taking around 30-60 seconds, but they may not realize that connecting their iD to their institution is just as important. It provides the institution with the researcher’s verified ORCID iD, and it can provide the researcher with an electronic record of their affiliation that is easily sharable with a variety of publishing and funding systems with which they interact. It also provides the institution with an easy way to standardize how its name is used by its researchers, and simplifies the sharing of the researcher’s body of work with the institution.

The University of Auckland Library encouraged researchers in faculties with lower sign-up rates to register during their ORCID pilot program. Those who requested or received help from the library and connected their iD back to their institution could receive a gift of a custom mug. At the end of the 12-week pilot, 286 researchers received a mug customized with their name and ORCID iD.

Add ORCID bookmarks to reserved books

Bookmarks, stickers, and other ORCID-branded stationery are popular giveaways at ORCID outreach events and library ORCID infodesks. Circulation librarians in American university (see their ORCID subject guide) insert ORCID bookmarks in reserved books, putting ORCID directly in front of researchers in their regular activities. Templates to create your own ORCID bookmarks in multiple languages are available at our Member Support Center.

ORCID bookmark templates are available at https://members.orcid.org/outreach-resources

ORCID resources for your outreach campaigns

All ORCID resources have a CC0 license, meaning anyone can use and reuse them to create materials tailored to their engagement needs. Download and use the ORCID iD icon to represent ORCID — it’s green, it’s public domain, and it’s available in many formats. (Need another format? Let us know!)

We are launching new education and outreach resources tools in mid-October to help our users understand what ORCID is and the benefits of having an iD. The outreach resources toolkit supports communications and engagement campaigns, including a sample communications plan and updated bookmarks, banners, flyers, and sample promotional text to reflect new Registry features.

Have your own example to share? We’d love to hear it!

Our Member Support Center resources pages feature examples of integrations, LibGuides, promotional materials, member outreach strategies, and other resources shared by the ORCID community. Share your examples for the community to benefit. LC
More is simply more: thoughts on open access

BY GREGORY J. GORDON | OCTOBER 22, 2017

Open access

During Open Access Week, it’s interesting to look at the proliferation of open access types and the associated terminology. It started simply with the Budapest Open Access Initiative in 2002: green for self-archiving of a paper into a repository and gold for publishing open access in a peer-reviewed journal. A year later, the JISC-funded RoMEO project added blue (archive the post-print, but not pre-print), yellow (archive the pre-print, but not post-print) and white (no archiving allowed). Around 2008, gratis and libre were added. A gratis OA paper is free of price barriers as the publication is openly available, free of charge. A paper is considered libre if one or more of the permissions barriers are also relaxed.

The latest OA color is black — papers that have “escaped their paywall,” or more simply, been made illegally available on sites like Sci-Hub.

I spend a lot of time in this space and find it terribly confusing. For me, I think it is much more productive to think about openly sharing research and helping to increase research performance.

Early stage research

In addition to the coloration of open access, the nomenclature around scholarly outputs has become nuanced to the point of confusion. Preprints have become a generic phrase used for everything not published. It is a lazy term. We don’t know if something is a preprint until a later version is published. Ideas, idea papers, working papers, conference proceedings and submitted papers are all early stage research.

Early stage research is important. It is usually freely available and openly shared, allowing research ideas to evolve as they move through the continuum. Researchers can receive feedback on an idea. The feedback may be the idea is silly and should be abandoned, or it may provide suggestions to improve it prior to submission to a journal. By sharing their early stage research, researchers can claim an idea, grab attention or provide something for others to build on.

Broader sharing of and access to early stage research is only part of the solution. Again, more isn’t necessarily better, but it is part of the mosaic.

Platforms

Researchers have traditionally used repositories for sharing their papers and increasing exposure to their research. Content is usually aggregated within a discipline or institution through repositories. The core problem for both is that disciplinary repositories (DRs) and institutional repositories (IRs) are limited to one discipline or institution. Several years...
ago, I said SSRN was combining these two types of repositories into a multidisciplinary, multi-institutional repository (MDIR). Since then some repositories have expanded their subject areas and organizations have aggregated smaller repositories with limited success.

MDIRs provide the core access and exposure benefits of DRs and IRs with an interdisciplinary, inter-institutional, inter-perspective twist. They allow classifications into multiple subject areas across disciplines and institutional categories. For example, a Sarbanes-Oxley accounting paper, can also be classified into Securities Law, Regulatory Economics or Corporate Governance, giving researchers in those communities access to “new” and innovative perspectives from researchers looking at the same problem from other communities. The MDIR offers exposure to different ways of thinking and concepts, all within the same repository. The cross-pollination of ideas and discovery across institutions, helps researchers create new, innovative research faster.

As I look back on it now, SSRN is much more than a MDIR. It is a platform with a sustainable, freemium business model. Platforms are two-sided business models with incentives for both producers and consumers. SSRN created a scholarly research platform with human curation and cross-disciplinary classification to facilitate discovery and ease of use. The researchers submit for free and are given broader dissemination across disciplines than they could in a traditional repository. Users download for free and are able to discover research curated from dozens of disciplines and hundreds of institutions in a way not previously available.

I often get asked about impact of research. Obviously, the higher the quality or greater the impact the better. But I usually reply that impact, like beauty, “is in the eye of the beholder.” If three people read a research paper and one cures cancer because of it, then the paper is seminal. We don’t need more colors or versions. We need better platforms for researchers to share more and as early as possible, and tools to help users find more knowledge.

In this case, more is truly better. LC
100 stories that show why open access matters

OCTOBER 22, 2017

Celebrate Open Access Week with an inspirational free webinar 100 Stories of Impact: One Year Later on Wednesday, Oct. 25 (recorded webinar now available). Promita Chatterji, bepress product marketing manager, will follow up on a 2016 project shifting the discussion around open access from "how" to "why." She’ll explore why the library cares about open access as it relates to the institutional repository, and how that translates to authors and institutional leadership.

Libraries

Librarians in the bepress community leverage open access scholarship that goes beyond green and gold journal articles — materials like technical reports, conference proceedings and student theses — to raise the visibility of the entire institution. By making this work publicly available and clearly branded, the library can help enhance the university’s public profile and stake out a more central role on campus.

Authors

Whether individual faculty and students or groups of researchers affiliated with labs or open access journals, authors are able to advance their professional careers by making their work more visible. Early-career researchers can make a name for themselves, and researchers at any stage can establish themselves as experts in their field.

Institutions

What do prospective faculty, students and funders see when they search for information about your institution? Making a wide breadth of your scholarship discoverable through the institutional repository means they’ll find concrete examples of what makes your campus unique. Leaders in the Office of Research, Provost’s Office and Graduate Programs also love seeing detailed information about the institutions, organizations and businesses that are reading their work.

Join us for Wednesday’s webinar (recorded webinar now available) to hear an updated sampling of 100 stories that show the impact of open access for researchers, institutions, librarians and readers around the world. 

Download Open Access: 100 Stories of Impact for 100 examples that demonstrate concrete outcomes of open impact framed within overarching themes.
Librarians interested in advancing open science may find their researchers are reluctant to share their research data. A recent study found a disconnect between researchers’ perception of the importance of sharing data and their actions. By understanding the underlying issues, librarians can thoughtfully play a role in helping to advance data sharing at their institutions.

Mapping data sharing practices

The Elsevier Research Data Management team helped frame Elsevier’s research data principles, starting with research data should be made available free of charge to all researchers wherever possible, with minimal reuse restrictions. The team aims to support researchers in achieving this goal with data sharing tools and via collaborations with libraries, researchers, data centers and government agencies across the globe. In a recent collaboration with the CWTS (Centre for Science and Technology Studies) at the University of Leiden, we mapped the current landscape of data sharing practices. The year-long, large-scale study, along with the underlying data,1 is available online.

Using a multi-faceted approach, the team:

- Analyzed acknowledgement sections in scientific articles and citations to data articles
- Surveyed researchers on their data sharing practices
- Conducted three in-depth case studies in soil science, human genetics and digital humanities

One third of respondents did not share their data at all. Source: Open Data: the researcher perspective - survey and case studies.

Uncovering the barriers to data sharing

Sixty-nine percent of the 1,167 respondents agreed that sharing data was very important in their field and 73 percent wanted to have access to other people’s data. However, only 37 percent believed there was credit attached to doing so, and only 25 percent felt they had adequate training to properly share their data with others. This illustrates the data sharing gap: although they would like to access other people’s data, researchers often do not have enough time, training or incentives to share their own data properly.
Respondents’ main barriers to sharing data were:

- Privacy concerns
- Ethical issues
- Intellectual property rights
- Training in data sharing practices

Mandates from publishers or funding agencies were largely not seen as a driving force for sharing.

This combination of lack of training in how to share data, concern regarding reuse and privacy, as well as a perceived lack of urgency in terms of mandates, drives the gap between desire and practice concerning data sharing. It is clear that a multi-faceted approach is needed to bridge this gap.

Implementing data citation standards

From the bibliometric analysis it became clear that although the number of citations to data journals is growing, they are still a small portion of the overall citations, and their adoption is quite domain specific. In addition, there is a lack of standards regarding data citation in regular journal articles, making it difficult to assess data citation and reuse. Acknowledgement sections do not provide consistent mentions of data sharing and use, limiting insight in how widely data is shared and used across domains.

Addressing the lack of data sharing standards could improve the perceived lack of credit for sharing data, and consequently support improved data sharing. To this end, the implementation of data citation by publishers as part of the Force11 Data Citation Implementation Pilot offers a clear path forward.

Closing the gap

To support incentives for data sharing, the Make Data Count project (spearheaded by the California Digital Library and DataCite) aims to develop a shared set of data metrics to give researchers and institutions credit for following proper data management and sharing practices. To further encourage data sharing, a set of clear and unavoidable data mandates are being developed by funding agencies that move beyond the requirement to create a Data Management Plan (DMP). For more information on funding agencies’ current mandates, see Stony Brook University Library’s helpful overview and the California Digital Library’s detailed overview within the DMPTool.

Looking beyond mandates, publishers, libraries and member organizations are gathering to provide support for data sharing practices through guidelines and tools. Some of these initiatives include:

- Clear data sharing guidelines — The Center for Open Science’s TOP (Transparency and Openness’ Promotion) Guidelines (endorsed and implemented by Elsevier, among others) and the COPDESS Best Practices Proposal offer clear methods for journals and publishers.

- Development of Machine-Actionable DMPs — These can support the monitoring of data sharing practices within institutional data management systems, and check whether planned data sharing and storing has occurred. Several groups are developing formats to make these easy to implement in current systems, and offer a guided and transparent model for enabling best practice for data sharing across the various disciplines, including the UK’s Digital Curation Centre, the FAIR DMP Group at Force11, and the recently announced NSF EAGER grant, awarded to the California Digital Library for developing Actionable DMPs.

From the domain case studies, we found that national and regional differences in data sharing practice hampered widespread sharing and reuse, because laws and customs differ in regions and countries. The good news is that collaborative research projects naturally enable and enhance data sharing and storing practices, because of their distributed nature.

In some fields, data sharing practices are engrained within the research practice. For example, in digital humanities sharing code through Github is endemic, and code sharing easily translates to data sharing. In other fields, such as human genetics, the fact that raw (sample) data and processed (analyzed) data were used by different individuals at different moments made for an “endemic” data sharing structure, which can be used to scale up sharing and publishing practice.
Leveraging librarians’ expertise

Our study has shown that data sharing is very much a practice in flux: there is a perceived need for better ways to share more data, but still a lack of standards, drivers and training to do so. Many survey respondents were unaware of institutional and funder requirements around data sharing, and were concerned by the additional time needed for data sharing and reporting. Along with other key stakeholders, librarians can play a critical role by:

• Facilitating a better shared understanding of ownership (38 percent of surveyed researchers erroneously believed ownership of their research data shifted to publishers after publication) and licensing, and issues of responsibility and control when it comes to research data

• Supporting data management in practical terms by applying information management expertise to research data and selecting tools

• Training researchers in the use of those tools and advising in the how-tos of research data management

The Elsevier Research Data Management team is interested in supporting these efforts by librarians and others at the institution to further these goals. We cordially invite librarians to discuss partnerships for driving community participation in data curation, storage, and sharing practices. To further these goals we are developing a suite of tools, including DataSearch and Mendeley Data, to improve research data management practices. We are also working on a basket of data metrics to ensure researchers receive credit for data sharing and will be sharing more on that initiative soon. We invite librarians interested in these issues to comment below or contact us at anita.dewaard@reedelsevier.com or h.cousijn@elsevier.com. LC

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7 tips for finding open access content on ScienceDirect and Scopus

HOLLIE HAYWARD | OCTOBER 24, 2017

Librarians are working with their user communities to inform them about open access issues and initiatives, including how to publish open access and locate open access content. Researchers can now publish open access in more than 2,000 Elsevier journals and easily find open access content on ScienceDirect and open access titles on Scopus. Share these tips with your researchers so they can leverage opportunities with Elsevier to publish open access and discover the growing body of open access content.

1. Find a list of open access journals on ScienceDirect.

From the ScienceDirect homepage, click on Journals in the top menu. Filter the All access types dropdown list by selecting Open Access Journals for fully gold publications (all articles published in these journals are open access). Bookmark this page for easy reference.

2. Find a list of all journals that contain open access content on ScienceDirect.

From the All access types dropdown list, select Contains Open Access. This will display all journals that contain open access content (1,850 Elsevier journals provide an option to publish traditionally or with an article publishing charge to make the article open access).

3. Search for open access articles on ScienceDirect.

Enter your keywords into the search box on ScienceDirect. Filter the list of articles returned by Access type in the left-hand menu. Select Open access to display only open access articles from among your results.

You can then filter further by subject via the left-hand menu.

You can also use the Advanced search option and filter by Open Access articles.
4. Find out if the article you are reading is open access.

If you are reading an article on ScienceDirect there are two places check whether the article is open access: look for the orange label open access located under the article’s title and author information. Look for the orange Open Access text in the masthead. This indicates that the journal is fully open access. To find out how to reuse an open access article, look at the end user license which is always shown for open access articles with a hyperlink to a description of the license.

5. Find open access articles in a particular journal on ScienceDirect.

A fully open access journal has an Open Access label beneath the journal title. Click on this label to reveal more information about the articles within the journal.

Identify journals that publish articles both under a subscription model (no article publishing charges) and gold open access (with article publishing charges) by the Supports Open Access label beneath the journal title. Click on this label to reveal more information about how to publish open access articles within the journal.

6. Set up an RSS feed for open access content from a particular journal in ScienceDirect.

To be alerted when new open access content is published in a particular journal, set up an alert on the journal homepage. Under Find out more, select RSS if the journal is fully open access or Open access RSS if the journal supports open access.

7. Find open access publications on Scopus.

To find open access publications on Scopus, select Sources on the main menu and then Browse sources. Filter your results using Display only Open Access journals to return a list of fully open access titles.

You can also use the Display only Open Access journals filter on a list of search results from Search for a source.

See also More ways to discover content from open access journals in Scopus on the Scopus blog.
Researchers are increasingly required to meet funding body requirements around open access. This can include publishing their articles open access (gold OA) or making a version of their subscription article openly available (green OA).

Librarians play a central role in facilitating open access publishing (see recent Library Connect survey). At a basic level, this can include answering their researchers’ questions about open access, but deeper involvement may involve administering funding for gold OA and/or managing the institutional repository (IR). IR managers face several challenges in supporting open access uptake and driving policy compliance:

- Getting an accurate picture of how researchers are publishing
- Ensuring compliance with copyright and licensing requirements
- Meeting funder requirements around manuscript deposit

All of these areas incur costs in terms of time, management and infrastructure. We are here to help!

Working together to make green OA easier

The good news is that all Elsevier journals provide green open access options, and any author publishing with Elsevier can self-archive their accepted manuscript on their IR for immediate private sharing within their institution and public sharing after an embargo period. You can easily check the embargo periods for all our journals here. We also provide a free API program for IRs, and support to funders and institutions participating in CHORuS, which provides public access to scholarly content from certain funders, and supports institutions and funders with monitoring and tracking compliance.

Elsevier’s free API program

Elsevier has developed APIs that IR managers can leverage to showcase their institutional output, increase public access and enhance the user experience. Here’s how they work:

1. Use the ScienceDirect Search API to identify all articles published by your researchers and pull good, clean metadata on these. Scopus subscribers can use the Scopus API to do the same.
2. Use the ScienceDirect Hosting Permissions API to pull embargo end dates for manuscripts, making the process of offering content and copyright compliance even easier.
3. Use the ScienceDirect Entitlements API to ensure researchers are always made aware of their access options, including when they have access to a final published article.
4. Use the ScienceDirect Article Retrieval API to link out to the ScienceDirect platform, show a locally hosted manuscript to users, or stream articles within the repository environment. This helps solve multiple pain points: chasing authors to deposit, showing entitled users the best available version of an article, and reporting important metrics such as usage.

Case study: University of Florida

The University of Florida uses the Elsevier APIs to search for and download author-affiliated metadata and abstracts to its IR, and link to full text. Institutional dashboards, alerting and reporting mechanisms were also developed. The pilot helped to create mechanisms to track and report on compliance, and minimize duplication of effort and burden on researchers.

The screenshot below shows how users can search for articles and then clearly see whether they have access to the final published article. Where the article is open access, this is clearly displayed and the Entitlements API enables authors to automatically see where they have access to subscription articles. If Check access displays, the user will be taken to the ScienceDirect guest page, where they will be asked to log in or shown other access options.
Case study: Qatar University

Qatar University uses the Scopus and ScienceDirect APIs to provide metadata and abstracts. Additional links are provided to embed the best available version of Elsevier articles within the repository — either the final published article for entitled users or articles published gold OA, or the accepted manuscript after the embargo period for everyone else.

The screenshot below shows that users can see whether they are able to access the publisher version of the article. The example below is Open Access, which means all users can access that version of the article. Others options displayed include the full text PDF available to subscribers, a first page preview which displays the first page of articles for non-subscribers, or an embedded accepted manuscript which displays the accepted manuscript post-embargo for non-subscribers. Below the publisher version of the article there is also a link to the locally hosted manuscript.

What is CHORUS?

CHORUS is a cost-effective and permanent public access solution, efficiently reusing existing infrastructure, such as Crossref, publisher platforms and archiving solutions, including Portico and CLOCKSS.

Benefits

- Avoids duplication of effort
- Increases compliance
- Maximizes the benefit from existing proven infrastructure
- Offers transparent reporting and tracking for funders and institutions
- Helps track faculty research output
- Relieves administrative burden

It is currently operational in the US with pilots being run in Australia and Japan.

How does CHORUS work?

An author submits their article to the journal of their choice identifying their source of funding. If the article is accepted, after peer review it receives a unique ID and funding body ID. The publisher sends this information to Crossref as part of the metadata of the article and the article is published on the publisher platform. The publisher ensures access to the best available article: the final version for an open access article or readers affiliated with a subscribing library, and the full text of the accepted manuscript after an embargo period for others. An article within the CHORUS ecosystem can be:

- Indexed and found by any search engine
- Found via the CHORUS portal or funder’s repository
- Text mined via Crossref’s Text Mining service
- Permanently preserved via CLOCKSS, PORTICO and other third-party dark archives
- Monitored and tracked in real time for compliance via CHORUS dashboards

How can I find out more about IR services?

You can find out more about Elsevier’s IR services on our website, where you can also register to implement ScienceDirect API services or learn more about the services.
Case study: CHORUS six-month pilot project with Japan Science and Technology Agency (JST)

In addition to being operational in the US and working with funders such as the NSF, DOD and the Smithsonian, CHORUS has been piloting its services in Japan and Australia. Working with JST and Chiba University, the pilot project in Japan set up tracking of public access to articles reporting on JST-funded research. This tracking has directly helped JST to monitor public access compliance, with information displayed in JST-specific dashboards. The project also sought to improve metadata for Japan’s institutional repositories — specifically at Chiba University — for articles tagged as JST-funded research and authored by university and research institute staff, faculty and students. Due to the success of the pilot, the JST signed a Japan Dashboard agreement with CHORUS in September 2017.

Read more about how Elsevier is working with CHORUS:

- 4 reasons CHORUS is gaining traction
- Manuscripts of DOE-funded research now available open access
- How CHORUS works when publishing with Elsevier (infographic)
Survey findings: Librarians, researchers and open access publishing

OCTOBER 25 2017

Does your library offer any funding for article processing charges?

75% NO 15% YES 10% WE ARE EXPLORING

This month, Library Connect sent a short survey to subscribers asking for input on how librarians and information professionals are helping to inform their researchers about open access publishing options. Download, benchmark, share some key data points and read additional comments below from your library peers around the world:

Additional thoughts on the library’s role in OA publishing and OA in general from survey open fields

- Offer OA journal and/or book publishing services
- Provide consultation and guidance on copyright and OA options
- Provide access to services and resources that help assess quality and impact of scholarship, from traditional bibliometrics to emerging altmetrics
- Marketing and promoting OA scholarship on campus
- Support and training of researchers around the issues of scholarly communication
- Collaborate with research office and related entities on OA policies and initiatives

“The issues are complex — metrics for OA journals, role of predatory OA, role of OA journals in helping or damaging tenure applications, cost and funding for it, etc. Not an easy thing to address.”

Another respondent outlined a three-step approach:

1. Create a positive research environment that inspires our researchers to do excellent research.
2. Make sure that their work will be freely available to the public by also creating an OA publishing fund.
3. Organize informational and motivational sessions for institutional and faculty board members.

A survey respondent indicated their researchers were conflating paying an article publishing charge (APC) with “vanity” publishing, and that there was a lack of understanding of embargoes and copyright. Their researchers are uploading to ResearchGate instead of the institutional repository — not understanding that repository staff ensure compliance with publishers.

Additional ideas to promote OA from survey open fields

- Video interviews with scientists about open access
- Add links to open access resources on library website
- Use current awareness services, such as blogging and text messages
- Host legal activities about open access
- Create beautiful banners promoting OA publishing and place them in conspicuous locations for researchers to read
- Connect OA publishing with researchers’ personal career advancement/promotion

“At every opportunity librarians need to raise the issue, bring awareness, debunk myths, promote the option and show leadership.”

Article sharing: Authors

Identify the version of your article you want to share based on where it is in the publication process

Preprint
Your write-up of an article based on your research results and analysis.
- Not peer reviewed yet
- Typically a Word document
- What you submit to a journal

Accepted manuscript
Your article that has been peer reviewed and accepted for publication.
- Includes author-incorporated changes from peer review
- Not fully formatted or copyedited
- No journal or publisher branding

Published journal article
Your final published article that appears in a journal.
- Includes journal and publisher branding
- Has been copyedited and fully formatted
- Available in HTML and as a PDF
- Becomes the article of record superseding all other versions

Draft
No restrictions on sharing. You may want to share publicly to get early feedback.*

Reviewed
Can be shared within your institution at any time (often in institutional repositories). Can be shared externally after the journal’s embargo period.

In Print & Online
Sharing is limited, for example on platforms such as ResearchGate or Academia.edu, unless an article was published open access. Can always be shared in response to individual requests and in private groups.

* arXiv, SSRN and NBER Working Papers, among others, specialize in sharing preprints/working papers and may be discipline specific.

ASK A LIBRARIAN
if you have questions about when, where and how you can share your articles

Identify the version of your article you want to share based on where it is in the publication process
Pulse Check: Librarians, researchers and open access publishing

Data points from an informal survey of librarians and information professionals who have a role in informing researchers about publishing their papers open access.

Who within your library is *primarily* responsible for educating researchers about open access publishing options?

- Research Support Librarian
- Reference/Instructional Librarian
- Liaison/Subject Librarian
- Scholarly Communication Librarian
- Institutional Repository Staff/Manager

How librarians rated their researchers' knowledge of issues related to publishing their journal articles open access

- MAJORITY RATED GOOD TO FAIR
  - Article Processing Charges (Gold OA)
  - Copyright
  - Funders' Policies/Compliance
  - Journal Evaluation (Quality, Reach)

- MAJORITY RATED POOR
  - Self-Archiving (Green OA)

Does your library offer any funding for article publishing charges?

- Yes
- No
- We are exploring

The top library-led means of informing authors about open access publishing options selected were:

- #1 Policies and mandates
- #2 Regular OA publishing information sessions

Most effective initiatives to get researchers to upload a version of their journal articles to the institutional repository

- Depositing for them
- Personalized request to deposit
- Directive from a more senior researcher or Research Office
- Institutional mandate or policy
- Incentives such as impact metrics or other recognition
- General promotion/providing information about depositing

"A little marketing goes a long way ... The old 'if we build it they will come' doesn’t work, and never has."

"...whatever we do, we must take an holistic, empathetic and user-centred stance ..."

SURVEY: This informal survey of Library Connect subscribers was conducted in October 2017. There were 216 survey respondents from 50 countries.

Library Connect
Partnering with the Library Community
https://libraryconnect.elsevier.com

Discover how Elsevier supports gold and green open access at https://www.elsevier.com/about/open-science/open-access

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