# Sherif Scopus Enhancement Group Committee Meeting
5th August 2019
Elsevier Ltd, London

**Attendees:**

Sherif members:
Lucy Ayre, University of Leicester
Patti Biggs, The Francis Crick Institute – Committee secretary
Peter Bradley, University of Bath
Elizabeth McHugh, University of the Highlands and Islands – Committee chair
Lynne Meehan, University of Cambridge
Robyn Price, Imperial College London

Supplier representatives:
Iana Tsandev – Head of Product Management, Platform Content, Scopus
Kai Wan – Senior Product Manager, Scopus
Charles Martinez – Senior Customer Consultant at Elsevier
Monica Mak – VP Marketing Development

Apologies:
Katherine Stephan, Liverpool John Moores University


### 1. Welcome and Introductions

Elizabeth welcomed everyone to the meeting. Everyone brief introduced themselves as there were new committee members and a new Scopus representative – Iana. Monica also joined the meeting mainly as an observer, such forums as this committee do not exist in other territories and she was interested in seeing how they work. Elizabeth provided a short introduction to Sherif for Monica.

### 2. Minutes of the last meeting – 19th February 2019

No queries on the previous minutes. Thanks were expressed for the comprehensive minutes.

Actions from previous minutes:

| Page | Action | Response |
|---|---|---|
| 2 | Susanne to share details of research paper | Susanne has moved to a different role within Elsevier. Charles responded that the paper has not yet been published. |
| 3 | Top menu needs to remain visible. Kai to report on design team response | This action was missed when going through minutes |
| 3 | Missing book raised by Open University | Was an indexing glitch and should be fixed. **Action: Please could Open University check** |
| 4 | Request for support KPI to be share with committee | Kai had asked, but they could not be shared as are internal company documents. Peter asked what the response time should be? Customer must get a response within 30 days whether positive or negative. Bug reports are sent to the Product manager and this information is shared with helpdesk team, so it can be conveyed to customers. Charles added further details on how queries are handled. First line support is the helpdesk (an external contracted service, so staff have only basic training on Scopus), more complex queries are escalated to second line support (Elsevier employees). Users can also raise queries with their local customer consultant. Charles' advice was to bookmark |

| | | the helpdesk webform (https://service.elsevier.com/app/contact/supporthub/scopus/) as it takes a number of clicks to access it. |
|---|---|---|
| 4 | Mendeley data query | Kai had referred the query, but due to personnel changes had not had a reply. |
| 4 | Patent sources | The patent offices included are Europe, USA, Japan, UK and WIPO (World Intellectual Property Organization). WIPO includes patents from offices across the world (see list at: https://www.wipo.int/directory/en/urls.jsp) Patents may appear multiple times as records from different offices are not de-duplicated. |
| 5 | Combining searches | There is work being done on this with the Scopus UX (user experience) team. Use of check boxes is not good for those who use screen readers, so is not DDA compliant. It is therefore impossible to produce a solution for visual users and those user with disabilities who use screen readers and/or keyboard. |
| 5 | Personalisation popups | Kai had raised the concerns about popups and ask if the members had noticed any changes. The response from the Sherif members was that the number of webinar popups has reduced, but the "Create account" popups are a still a bit of a barrier, especially when doing training sessions. It is possible to demonstration Scopus searching without personalisation, and dismissing popups takes time and disrupts flow. |
| 5 | Notes on indexing book chapters | These have not been supplied and Susanne has moved to a new role in Elsevier. **Action: Kai will contact her again to ask for these notes**. |
| 5 | Small links on Scopus webpages | A redesign is occurring. |
| 5 | Refworks agreement | The legacy contract expires in March. This licence is Elsevier wide not specific to Scopus, so Kai is trying to track down who in the company has it. Elizabeth has had an email from Refworks about this topic which might help. **Action: Elizabeth to share the email with Kai.** |
| 6 | Full text reader | Unfortunately the product manager handling this project has left, so the project is in abeyance. A prototype was built but not launched. Kai does not think that any pdf reader is on the road map at present, but will check. **Action: Kai to ask if a pdf reader is on the road map.** |
| 6 | Citation counts from Articles in Press | There was a change in document type for Articles in Press last year from IP to AIP. AIP citations should automatically carry forward the full paper. However that some documents with IP did not get automatically converted to AIP and the citation counts for article in press and full papers remain separate. |
| 7 | New Refworks integration | Still no progress **Action : Elizabeth to refer this the Refworks Enhancement group again** |
| 8 | AOB: New licencing agreement for Scopus | Charles provided an update that licencing conversations are due to start in September |

### 3. Queries and Comments from Sherif members

The feedback received from Sherif members is included as appendix A. The responses are recorded here:

**Cranfield University**
1. Clickable keywords – should be possible, but needs clarity as to where to search. Lynne comment that students often pick poor keywords so could get too many results. Also this

would be different to ePMC where hyperlinked words link to more information, such as a definition. The general feeling was that this would work best if linked to a controlled vocabulary. Elsevier would like to see a use case for this functionality. **Action: Cranfield to provide a use case**

2. Seamless movement between Scopus and ScienceDirect - all Elsevier products are transitioning to Elsevier's ID+ system, so should remember signed in users as they move from platform to platform. The ID+ system will work of OpenAthens, Shibboleth, IP and Ezproxy, so will work both on and off campus.
3. Ability to search Title and Abstract only – this is possible in Advanced search, but not through the Simple search.
4. Date range delimiter in search facet rather than having to click box for years – this is available in Advanced search using LOAD-DATE field code (in the Document section of field codes listing), so should be possible to add as a facet on the search results page
5. Make default search relevance – most of the committee were not convinced that would be widely supported as it creates two problems for trainers: explaining how relevance is calculated and never getting a consistent results set. Peter commented that relevance is important to his users, but was unclear how relevance was calculated: it is a count of search term occurrence in title, keywords and abstract, but does not take into account proximity or context – this might come in a new recommender engine. The general feeling was that this would be better as a personalization option, rather than a search default.
6. Highlighting all search terms: Charles explained that highlighting reply on an exact match, so doesn't work with search terms containing wildcards.
7. Cranfield's last point related to the loss of filters when a search was edited. Charles explained that this was expected behaviour for Scopus as editing a search starts the search process again. The committee thought it would be nice to have the option to retain the filters.

**Imperial**
1. An apparent drop in usage had been raised with Imperial by their customer consultant. Charles responded that the consultant had misunderstood the EPIC data. There is a lag in the data, so must compare the same point in each year or you would be comparing a complete year of data with a partial year of data. The data from 2016 appears to be anomalous for UK institutions (not sure whether elevated by crawlers or bibliometric searching), so the data does need investigating – Iana offered to do this. **Action: Iana to investigate 2016 usage statistics**.
2. This lead on to a more general discussion on usage data. SCONUL returns include figures for the usage of databases which is used to compare institutions and their funding. Charles stated that institutions can obtain anonymised usage data from SCOPUS to compare their own to. Mention was also made of the new COUNTER statistics rules from June 2019. Requests for EPIC access can be made to Harry Maltby (account manager for UK/Ireland) by Scopus administrators.

**University of Aberdeen**
1. Praise for the Scopus Certification Programme (for details see Appendix B) was echoed by others around the table who had also participated. If individuals wish to do the course off-site, they may need a remote access token (issued by the local Scopus administrator) to do the practical exercises in Scopus. The participants liked the way that if they made errors in the quizzes that they were pointed to the appropriate video tutorial and could re-view it before retaking the quiz.
2. Query 1 on saving a search URL – this is possible in Scopus, it just works in a different way from OVID. Saved search links from Scopus are shareable, running these searches will retrieve additional new records – this is not an issue. Kai will look at making sharing easier, by email and through private groups (such as Microsoft Teams) were suggested. There was also some support for sharing via social media and Slack. **Action: Kai to look at making sharing search URLs easier.**
3. Query 2 on two register/logins for Scopus. Charles clarified that the Institutional login is optional (some organisations use IP recognition) and that the institution chooses which system to use, for example Shibboleth. The individual account is only necessary for personalisation eg saving searches, alerts, export preference. The committees view was that it needs to made clearer that the content of Scopus can be used without creating a

personal account. Concerns with regard to GDPR were also raise re the data collected via personal logins.

**University of Cambridge**
1. Exporting – the use case for exporting large numbers of results is systematic reviews.  Kai explained that the current limitation of 2000 records is due to hardware limitations. He is aware of requests for larger results sets, but this need additional hardware, so has been added to Scopus' roadmap. He hopes to have news on this in 2020. **Action: Kai to update us on when this increase to number of exportable results is scheduled.**
2. Combining searches – the request for set numbers to include the # was noted. It was also comment that # does not appear on a standard mac keyboard (keyboard shortcut is the Option/Alt key + 3).
3. Display – the request to move page to page at bottom of results page was noted. It may be possible get move page to page repeated at top and bottom of results pages.

**University of Leicester**
1. Scopus funding/Sponsor filter: Kai explained how this data is retrieved. Information from the acknowledgements is extracted from the full text as a snippet. The snippets are then analysed using AI, text mining and natural language processing to extract the funding information, so it can be plugged into the paper's Scopus record.
2. Exporting citation information: Kai is working on getting more metrics into the Scopus API. There are lots of possible metrics, from PlumX and other sources, on some guidance the most useful metrics would be helpful. Many of the committee felt that having the FWCI (Field-Weighted Citation Impact) would be the most useful additional metric. Kai added that the Topic of Prominence, which comes from Scival, will be added to the Scopus API as they are closely integrated.  Kai also stated that PlumX are creating a new metrics platform, so that users would get consistent results across all Elsevier products. The API will only give the value of any metric, not how it is calculated, at the time of data request. PlumX has its own API (see https://dev.elsevier.com/documentation/PlumXMetricsAPI.wadl for more details), which all Scopus customers can access for free since July 2019 using same key and account ID as Scopus. **Action: Feedback on useful metrics to add to Scopus API from customers.**
3. Training workshops widget: Lucy added to the comments in appendix A that the widget was only available from your Scival customer consultant. This can be widget can be requested via a Slack message to Chris James. We discussed whether having a similar widget for Scopus was useful, the concensus was that there was not a clear use case as each institution has its own systems for capturing training.

4. **Scopus Update and Roadmap summary (see also two pdfs of slides presented at meeting)**

Iana spoke to the slides 'Scopus: product strategy & overview'. Elsevier have been analysing the entities that various stakeholders evaluate. The table in the third slide summaries their finding and their priority by value. Elsevier's mission is to "Help the world of research make high-value decisions with confidence", so provide they are looking to provide high quality reliable data for a variety of use cases. Iana focused her presentation on how institutions evaluate researchers (ie the top of box c in the table) and how Scopus data can contribute to this. The evaluation can be broken down into the four steps on Slide 5. She then looked at the first two steps (aggregating and filtering) in detail: Scopus currently aggregates data from 5000 publishers and filters journals through their Scopus Content Selection and Advisory Board (CSAB) to ensure 'predatory' and other low quality journal are excluded.

On Slide 6 she presented the types of data that contribute to an evaluation. Scopus already includes journal articles, books and conferences, and is looking to expand to cover a wider range of research outputs and research uses, eg Policy documents as they show the societal impact of research. The REF expects a 100 word statement on the impact of a researchers work. Missing from the diagram was any measure of industrial/commercial impact and impact of standards as there is no data source for this. Funding information may be used as a future indicator of performance, so they will aim to capture more information on grants. Iana acknowledge that there are going to

difficulties with non-standard outputs in the Arts and Humanities as wide scale curated information on these does not exist, so it is hard to know what to include and how to establish the fidelity of these output. She also gave more information the work being undertaken on Preprints. Scopus are going to index the top five preprint servers, including arXiv, biorxiv. They also want to add more conferences, but they can be difficult to capture. The references from open theses may also be added as demarked information set. So Scopus is seeking to broaden coverage and looking at deeper integrations of existing information, eg grants to papers.

On slide 7 Iana presented the priorities and next steps including strengthen the capture of non-English language information as long as it has an English abstract.

In the last section of her presentation Iana looked at integrating knowledge to build the best data set in the world. Medline and PubMed records will be collapsed into a single entry. Work is ongoing on improving data fidelity, for instance the high quality programme which is systematically improving the historic corpus of records. They are also working on performance improvements for newly indexed materials. Another area is providing predictive profiles at scale and for this have acquired Parity Computing Inc which has expertise in AI, which can be used to optimise the creation of author and institutional profiles. They are also looking at their curation capabilities, so manual corrections to profiles are quickly and reliably validated.

Kai then presented the 'Scopus roadmap 2019' which will bring about this strategy. He first summarised in a single slide what had been achieved between January and June 2019. His next two slides looked at what was planned for Q3 and Q4 of 2019, with the caveat that things may move in the roadmap and that the information for Q4 is preliminary, so may change or move into 2020 . In Q3 the rollout of ID+ had been postponed from July to end of August and therefore won't be concluded till late Q3/ early Q4. There will be some A/B testing with c 10% of users seeing the new heading. The Reaxys information in Scopus will not require a subscription to Reaxys. The change from additional content types displaying as links to tabs is imminent.

More details of the work planned for September are:
- Global Integrated header – a new Scopus header so that headers across all Elsevier platform are similar
- Product Switcher – will allow users to switch to other Elsevier products that their institution subscribes to
- Author lists will allow the creation of clusters of authors, rather than simply grouping together variants of same author name.
- MVP – a new simplified template search with fewer options, useful for foundation and lower year undergraduates

Kai provided more information on the proposed impact tab in author profiles: it would contain topics of prominence, co-author network, metrics. The FWCI metrics will require use of the new PlumX metrics API.

One proposal for Q4 was the ability to compare author analytics. This raised a lot of concern in the committee as whether this was an appropriate to do expose this data. When users are trained on SciVal a lot of emphasis is place on using metrics responsibly, but Scopus users would not have this train and might misinterpret the data. It was decided that should not be added to Scopus.

Kai did not present the rest of the slides in the slide deck as we had already looked at the roadmap and APIs earlier. Instead he shared a mockup of the new results display for the committee to comment on, this lead us into a further discussion on how preprints should be handled in Scopus. The outcome of the discussion was that the committee recommended:
- Not including citation counts for preprints in total citation counts, so won't affect H-index
- In author profiles to list preprints on separate tab with their citation counts
- Preprints should be kept in the database after they are formally published as preprints may continue to be cited and may be significantly different from published version
- Add links to preprint records to the published version

### 5. AOB

None

### 6. Date and place of next meeting

Date and venue to be confirmed – probably late Jan or early Feb 2020.

**Actions for next meeting:**

| Action | Page ref* | Action | By whom |
|---|---|---|---|
| 1 | P1:I2 p3 | Missing book – indexing should be fixed. Please check | Open University |
| 2 | P2:I2 p5 | Request notes on indexing book chapters from Susanne | Kai Wan |
| 3 | P2:I2 p5 | Share email about Refworks agreement with Kai | Elizabeth McHugh |
| 4 | P2:I2 p6 | Ask if pdf reader is on the Scopus road map | Kai Wan |
| 5 | P2:I2 p7 | Raise new Refworks integration with Refworks Enhancement Group again | Elizabeth McHugh |
| 6 | P3:I3 Cranfield 1 | Provide a use case for clickable keyword | Cranfield University |
| 7 | P3:I3 Imperial 1 | Investigate 2016 usage statistics | Iana Tsandev |
| 8 | P3:I3 Aberdeen 2 | To look at making sharing search URLs easier | Kai Wan |
| 9 | P4:I3 Cambridge 1 | To update committee when number of exportable records is increased | Kai Wan |
| 10 | P4:I3 Leicester 2 | Feedback on useful metrics to add to Scopus API | Any Sherif members using Scopus |

Page Ref constructed as
P – page of minutes
I – item number
p – pages referred to in Actions from previous minutes
Name & number – Name of university raising issue and point number in current minutes.

# Appendix A: **Scopus Feedback from sherif institutions July 2019**

<u>Cranfield University</u>

- Can article keywords be clickable so that you can click and then view other papers that have been given that keyword.
- Align Scopus and Science Direct so they work seamlessly with OpenAthens. Currently you have to log in again when leaving Scopus to go to SD if off campus.
- It would also help if there could be an option to search the title and abstract, but not the keywords. This is because if people use proximity operators, the terms are often picked up from the keyword field, where of course they will be in close proximity, but that doesn't mean that the article is relevant, so an option to exclude keywords from the search would be good.
- A from-to option for the date limiter would be helpful, because as it is, you have to click on each year that you want to include, which is rather clunky, and other databases just let you enter a date range.
- Also maybe if the default sort was relevance, rather than date.
- The results don't always highlight all of the keywords, and it would be really helpful if we could be sure that they did. The article below was found with this search:





The article highlights blockchain, but it doesn't highlight supply chain, and this isn't the first time that I have come across this, and sometimes you can't see any highlighting at all, which can be difficult to explain to the person who is asking why they can't see their keywords.

- If you do a search, then start to narrow it down using the filters – say, subject filters, then document type, then year, then you still need to go back and edit the original search (maybe with a proximity operator or an additional term), it then forgets the filters that you set and you have to put them all in again. Could this be amended so that it either didn't do that, or gave you the option to retain the filters that you have set.

Imperial College London
An issue that I would propose for discussion is potential decrease in usage trend. I was contacted by our Scopus consultant who provided me with data in concern that Imperial's session usage has drastically dropped since 2016. She then admitted that this has been noticed by Elsevier happening at multiple UK customer organisations. I was not clear if this is something that Elsevier are looking into seriously at the product level or not, the impetus of the call was can we as the library just try to increase usage. Would be interested to hear others experiences here if this is in the scope of the meeting remit.

University of Aberdeen
Praise:
- Scopus Certification programme – I took this 6-week programme in May/June and really enjoyed it. It was well presented with lots of online help/links and there was wide-ranging content taking me into areas that I hadn't spent much time in before. I would have liked a bit more on the Searching side of things (I provided this feedback at the end of the course)

Query 1:
- Do Scopus have any plans to introduce a search URL feature that Ovid recently made available? Ovid call it History Jumpstart (odd name!) and it is available from the menu at https://tools.ovid.com/ovidtools/
- We're still to test it but it's advertised as "convert your Ovid search into a URL to share with others or to embed in your website". It may be that Scopus APIs can be used for this but APIs are a bit techie and the Ovid features looks a bit simpler

Query 2:
- I'm not quite clear on the benefits to users from the two different Register/Login options for Scopus. I recommend the use of the Institutional login (via Shibboleth) rather than using the Register form as I think the Institutional login presents a more consistent approach across all of our resources for on/off campus access. Are there any additional benefits to users if they were to use the Register option instead?

University of Cambridge

Exporting
If we can only do 2000 at a time (fair enough), then can there be an easy way of working through sets of 2000 hits. (current work around is limiting by enough years to make up c.2000 hits, exporting, then selecting next range of years etc etc)


Combinations
Can you please help users by having #1 against the search line (rather than current just 1), so that it's more intuitive for them to use #1 in the "combine queries" box
Display
Please can there be an option to move to the next page of results at the bottom of the page, rather making me scroll up to the stop of the page each time.

University of Leicester

1. **Scopus Funding / Sponsor filter**: I would like to hear more about where this information is retrieved from and what method is used to extract it. The reason for this question is we have seen a rise in the number of queries related to research funding, e.g. Who are the main funders of recent papers in X discipline? How many papers by X authors have acknowledged funding the last financial year? Scopus has been our database of choice to answer these queries, helped largely by the Funding/Sponsor filter and the excellent export options. However we still have to resort to downloading full text PDFs to get definitive funding information, particularly with respect to the second example above, which is very time consuming but accurate. Is anyone else getting these type of queries or use cases for Scopus, and are any improvements to the data being worked on?

2. **Exporting citation information:** I would like to know whether there are plans to include more citation data within an item export. Currently, only Citation Count is exportable although the FWCI, benchmarking and PlumX metrics are all visible in an item record. The reason for this question is we are scoping out our research metrics service, which may include producing reports on item-level metrics. Though we are SciVal customers we would like to see more flexibility in Scopus to export the item-level metrics that are visible in the Scopus record. How are others using Scopus metrics in their service offering?

3. **Training workshops widget**: We have recently tested the new SciVal functionality with our Elsevier rep to advertise an in-house SciVal workshop. It was well-received by researchers who liked the interface and ease of booking, although some administration was duplicated as the Library has its own training record-keeping processes. Is there an appetite to extend this bookable appointment/training workshop widget in Scopus? If so, how do others see it being incorporated into their library training administration?

# Appendix B: **Scopus Certification Course**

SCP Autumn 2019 Registration Link - https://bit.ly/2Z3Zmox

**COURSE GOALS**
Participants will develop:
• Awareness of information needs served by Scopus
• Skills needed to use Scopus expertly and teach others
• Strategies for seeking out additional information about Scopus
The overall course begins and concludes with a self-assessment of skills. We value your feedback and comments; a short survey is included in every module. We encourage you to complete all of the course feedback surveys including the baseline self-assessment and the final course assessment.

**CERTIFICATION CRITERIA**
To complete the course and become a Scopus certified librarian, we expect you to watch video tutorials and conduct practice exercises, and, if you feel like you need more detail, review supplementary materials in the help files. Your knowledge of the material covered in each block will be assessed with a multiple-choice quiz at the end of each module.

Each block contains at least three lessons, practice exercises, a discussion forum and a final untimed, graded quiz to assess your competency of all of the lessons presented. Each assessment quiz will reflect all of the learning outcomes for a given topic and consist of 10 multiple-choice questions that are collectively worth 20 points. A score of at least 16 out of 20 (80%) or better is required to successfully pass each quiz and you must pass all quizzes to be certified.
For every incorrect answer on the quiz, you will be redirected to the associated tutorial and supplementary material for review. If you did not achieve 16 out of 20 or better the first time, you will have the opportunity to retake the quiz after you have reviewed the material.

Grading is based on a point system.
Grading scale: PASS = 80-100%

**1. Activities**
The assignment activities include viewing video class materials, completing the practice challenges and participating in the discussion forums. These activities are ungraded, but essential to the online learning experience.

**2. Assessment**
The assessment quiz for each module will reflect the learning outcomes for the module.
**Topical Search** (20 pts)
**Author Identity** (20 pts)
**Metrics** (20 pts)
**Scopus APIs** (20 pts)
**Institutional Impact** (20 pts)
**User Outreach** (20 pts)

**3. Feedback**
Each module will conclude with an ungraded survey to solicit your feedback on the effectiveness of the videos and practice suggestions as well as your satisfaction with the learning experience.

**COURSE OUTLINE**

Due dates for each module will be posted in Canvas. Typically, each course module will be available for one week. Each module will be released on Monday and should be completed by the following Monday. Each course module should take approximately 75 minutes. The material is presented in three lessons consisting of video tutorials, examples for practice and, as needed, supplementary material for your review. You will be able to start and stop the lessons to fit your schedule.

**OBJECTIVES**

**Week 1: Course Introduction and Topical Search**

Participants will be able to:

• Use Canvas in student mode.
• Perform keyword searches in Scopus and refine your results.
• Save searches and set up alerts.
• Expand your search to capture other relevant results.
• Build an advanced search query.
• Analyze your search results.
• Download and export search results to a reference manager.

**Week 2: Author Identity**

Participants will be able to:

• Perform author searches and find documents associated with an author.
• Understand how author profiles are assigned and how to make corrections, if necessary.
• Assess an author's impact and monitor activity associated with their documents.
• Use author profile data on other platforms.
• Find authors working in a topical area.

**Week 3: Metrics**

Participants will be able to:

• Search for and extract article and journal level metrics.
• Conduct comparative analytics and develop visualizations including citation/co-citation analysis.
• Identify research gaps in a field.

**Week 4: Scopus APIs**

Participants will learn:

• What Scopus APIs are and how they can be used.
• How Scopus APIs work.
• How to access and use the Scopus APIs.

**Week 5: Institutional Impact**

Participants will be able to:

• How to search for an affiliation in Scopus and how affiliation profiles are created.
• How to assess an institution relative to its peers.
• More about Scopus content and the variety of ways Scopus data can be used.

**Week 6: User Outreach**

Participants will learn:

• The basic user outreach concepts.
• How to conceptualize possible Scopus use cases for various campus audiences.
• Tips for activities to promote Scopus workshops.