Sherif Scopus Enhancement Group Committee Meeting
26th July 2018
Elsevier Ltd, London

Attendees:

Sherif members:
Patti Biggs, The Francis Crick Institute – Committee secretary
Peter Bradley, University of Bath
Mano Jacob, Imperial College London
Elizabeth McHugh, University of the Highlands and Islands – Committee chair
Lynne Meehan, University of Cambridge
Katherine Stephan, Liverpool John Moores University

Supplier representatives:
Susanne Steiginga – Senior Product Manager Scopus Content
Kai Wan – Senior Product Manager Scopus
Charles Martinez - Management Consultant at Elsevier

Apologies:
Laurian Williamson, University of Leicester

1. Introductions

This was a reconvening of a committee which had last met in July 2015. A number of new members have joined the committee, so each individual introduced themselves and stated what they hoped to get out of the meeting. Elizabeth then reminded the members of the terms of reference set by Sherif for the committee and its chair.

2. Minutes of the last meeting – July 2015

These were noted

3. Scopus Update and Roadmap summary

Susanne provided a lot of useful background information, her presentation is attached as appendix 1. This included statistics on subscribing organisations and organisations who use Scopus data in the assessment of research. She highlighted Italy's government use of Scopus when deciding to offer tenure to researchers: completeness of author profiles is quite crucial and has driven some changes in the author profile feedback tool.

She also provided statistics (slides 3-8) on Scopus content in terms of numbers of items and global content coverage. Many books have been added especially in Arts, Humanities and Social Sciences. Libraries with ebooks can have full text links added if they send a csv file with their selected titles to second line support. A question was asked about the overlap with Compendex: Scopus does not include theses, dissertations and standards as these are excluded by content policy, also the Compendex backfile data is excluded.

Susanne described in some detail how content is evaluated (slides 9-11) using strict quality standards by independent Content Selection and Advisory Board before inclusion in Scopus, this includes Elsevier's own titles. Questions were asked about the representation on publishers and the acceptance and rejection rates for Elsevier's own titles. Susanne sent responses to these questions after the meeting. Less than half the submitted titles are actually accepted for inclusion. Journal titles (and in the books too) are subject to an

annual review, any title which seems to be underperforming in terms of quality for two years in row is rigorously re-evaluated. Any title which fails the re-evaluation is no longer included in Scopus, although they may reapply after 5 years and be evaluated afresh: this can lead to gaps in coverage which are not back-filled. However if there is spotty coverage (ie individual or short runs of issues missing) of any journal users should continue to report these. Users can also report "problem" journals such as poor quality ones and these will be investigated. The Radar Tool is also used to identify potentially problematic titles. More details on the selection and re-evaluation process can be found at
https://www.elsevier.com/solutions/scopus/how-scopus-works/content/content-policy-and-selection

Once a journal is selected for inclusion Slides 12 and 13 summarise the processing and delivery of the data. Susanne indicated that the article records are licenced from the publisher, then processed to add value, like linking cited references and association with author and institutional profiles.

We went on to look at Author and Institutional profiles (Slides 14-18). Underlying Scopus are three related indexes – Articles, Authors and Affiliation. Author profiles are generated by a combination of algorithms with author feedback via the wizard. Susanne reported that there are plans to expand author profiling to allow for multiple affiliations. Temporary profiles (not visible) are created when the algorithm cannot match an author to an existing, these are manual checked by Elsevier staff. If the staff can match the temporary profile to an existing profile the publications are added to the existing profile, otherwise the temporary profile is made public. If an author finds publications in multiple profiles they can claim the publications via the Author Feedback wizard. The process for institutional profiles is similar, but only institutional account administrators have access to the institutional feedback wizard.

In the final section of her presentation Susanne looked at research metrics. This included looking at CiteScore (an average citation count for a serial titles) and PlumX metrics (measures usage, citations and social media engagement of papers). Susanne explained why the CiteScore for some journals will be lower than their Impact Factor: it is calculated using all papers in Scopus data which includes news and views, which are excluded from their calculations by Web of Science. Both metrics are available free in Scopus: non-subscribes to Scopus can view CiteScore by registering as a user.

A second presentation (Appendix 2) looked at the key developments that have taken place and what is on the development roadmap. Susanne talked to the Scopus HQ program (Slides 3-7) which is looking at improving the quality of both legacy and incoming data. The program has improved the completeness of coverage, filling gaps in data in individual records, and the timeliness of content appearing in Scopus compared to both WoS and Dimensions. The work has also included deduplications of records for Articles in Press with Medline and final version from publisher records, these multiple records were affecting citation metrics. Scopus now has >0.01 of records that may be duplicates.

Much work has also been done to provide more information on the journals included in Scopus (Slides 8-14). Susanne highlighted that in 2017 12,000 titles had a CiteScore, but no Journal Impact Factor, including 490 journals which are on top 10% of journals in their subject areas. Another change has been the inclusion of content from journalmetrics.scopus.com into the main Scopus platform as the Sources Pages. These surface information by journal title (including CiteScores), publishers and have popups with search suggestions to assist with searches.

Another area where a lot of work has been done is on Funding data (slides 15-18). Papers have had the full text of their funding acknowledgement indexed and data present as a Funding details table and text in SCOPUS below the abstract. There are also links to see funding opportunities in Mendeley (you may be asked to sign in to see this)

Open access is a growing trend and Scopus is seeking to make these papers discoverable (Slides 19-26). Since 2015 the content of fully open access journals has been flagged at journal level (Open access appearing beside the journal name). Since quarter one of 2018 Scopus has been also applying article level open access flags (Open access at the end the title information on both search results pages and article details) using data from CrossRef. This means that open access articles in some hybrid journals are now identifiable and searches limited to Open access will include these papers. Further work will be done in the second and third quarters to flag even more open access papers in hybrid journals.

A question was asked about Refworks. Currently the button goes to the old version of Refworks. Elsevier are waiting for Proquest to negotiate a new contract for Refworks, so they can integrate the new version into Scopus.

Looking at the Roadmap, Kai reprised the key achievements since Jan 2017. One of the key changes has been the introduction of User dashboards which give access to your support cases. Slide 29 gives the Roadmap for the rest of 2018 and some other tasks which will happen in 2019.In Q2 they will be also be looking at increasing the export limits between Scopus and SciVal and also make the exports easier. Secondly they will be restoring the filters for Funding body and Patent office which were "lost" when the search engine changed.

Kai expanded on the local content boards, these pre-select journals from their region which are then referred up to the main content board for a final decision. Looking at creating local boards for Asian and Spanish journals too. The topics of prominence will be coming from SciVal topics, so giving greater granularity on topics.

For Q4 Kai explained that Articles in Press are not currently treated as full documents so any citations of them are not counted towards an author's h-index, they are going to be reclassified as documents, so citations are captured. The enhanced analysis tools will allow bibliometricians to do their analyses within Scopus, rather than have to export .csv files for analysis in external tools.

Kai then presented a series of slides (30-38) which highlighted changes in the user interface which have been introduced in 2018 releases. These include:
- new look for author profile
- revised affiliation details page
- analyse search results will be changing from a tabbed view to a dashboard on 28 June
- introduction of user dashboard, allowing individuals to track their support cases

Kai continued to look at the new Author Profile Wizard (Slides 39-48). The new wizard has been introduced as many requests from the older wizard were never completed. Changes have been made to make it easier for non-subscribers to review and request corrections to their profile, also so an agent (like a librarian) to can submit changes on behalf of their researchers.

Kai also walked through the Institutional Profile Wizard (slides 49-53) which allows account administrators to create/modify the profile, create/maintain a hierarchy of organisational units within a parent organisation.

A third presentation (Appendix 3) comparing Scopus, WoS and Dimensions was only skimmed through to give more time to the queries and comments from Sherif members.

4. Queries and Comments from Sherif members

A number of members had provided comments and questions (see appendix 4). Susanne, Kai and Charles addressed the issues raised.

Kings College London comments on author profiling and cruciality of this to next version of Pure was noted. The comment on ensuring that the top menu remains visible was also noted and will be feedback to the design team.

The Open University reported a book record disappearing from Scopus, this content has been restored. More generally they were concerned about the helpdesk's misunderstanding of the issue they had raised and the resulting inappropriate responses, even when they went back to the helpdesk. Others around the table had also experienced similar issues with the support desk. Susanne responded that these issues picked up by monitoring and additional training provided to the helpdesk staff.

The Open University also raised an issue with exporting records from Scopus to Mendeley. A generic error message appears which doesn't indicate that the user needs to sign in to their Elsevier account and associate this with their Mendeley account. This is a problem on the Mendeley site due to the new logon system and non-merger of accounts.

The University of Bath had raised five points. Kai responded to their request for CSV exports to include Scopus Author ID, the API would be a better way to get this data. There will be an expansion to the number of records that can be viewed and downloaded in third quarter of 2018. The request for information on the sources of patents in Scopus was noted. Translations of patents are not available, but users can discover what the patent is about by looking at others in the same patent family. The broken links to Espacenet patents have been fixed. With regard to the request for more information on sources behind data search and future plans for it, Kai has forward this to Mendeley for answering.

The University of Cardiff raised two matters. The first was a search containing an OR between two phrases. The Boolean OR is being action first then the implied ANDs. Not possible to change the logic, but might get better results if used quotations or brackets around the phrases. The comment on combining searches being less intuitive than other discovery tools was noted.

The University of East Anglia made a similar comment about combining searches. They also find users confused by the two step process to use personalisation and requested that Scopus look at simplifying it, also making the Login button more prominent than Register. This feedback will be shared with the interface design team. They had also commented on the intrusive number of webinar popups which occurring training sessions last year: Kai has provided this feedback to the appropriate team.

There was a comment from University of Plymouth about searching, but no detail on the exact nature of the issue, so this could not be discussed or examined.

The University of Plymouth had noticed some inconsistences in the indexing of book chapters, Susanne undertook to raise this and provide an explanation.

As we looked at the live demos a number of additional comments were made. On the user interface some of the links are very small eg Sources and Related Sources – Susanne note this feedback. A user of Mendeley comment that it produced an overwhelming number of recommendations and social interactions which made it difficult to use for citation management – Kai will pass this feedback to them.

The Francis Crick Institute added a couple of additional matters. Clicking on titles in search results giving a null results page the first time they are click. This seems to be linked to a problem with individual accounts which are trying to connect to phantom Refworks accounts. The user removes the erroneous Refworks details, but they keep repopulating. Charles M commented that he also experiences this problem and that it is under investigation. The Crick had also notice that in its alert searches for new publications we receive some results for Cell Press papers which are "Article in Press" are not yet in visible in Scopus or ScienceDirect. Generally they appear in Scopus about 3-4 days after our alert search. Susanne will investigate if PB can send her some examples.

5. **Questions from Elsevier to group members**

Kai and Susanne had four questions for the group (these are also on Slides 8-9 of Appendix 3):
1. What would be most valuable & useful to you?
    1. To have all scholarly content ever published available in one product (curated, non-curated, peer reviewed, non-peer reviewed etc.)?
    2. To have all curated, high quality content available in one product with the option to include/exclude all scholarly content ever published
    3. To purely have curated, peer-reviewed content in one product?
2. And what about: currency/timeliness? How important is timely indexing to you? What indexing time (time from publication to present in product) is acceptable to you?
3. Green OA indicators:
    a. What is Scopus would extend its OA coverage with 'Free at Repository' content.
    b. This will allow users to still have access to the content even though it may not be the best version of the content (which would be 'Free at Publisher')
    c. Would this function benefit your use of Scopus?
4. Scopus full text reader:
    a. This function allows users to download and display full text articles in Scopus.
    b. Would you prefer to read the full text in Scopus or is it OK to download it first from publisher website before you can read it?

On question 1 there was support in the room for inclusion of preprints into Scopus as long as they were clearly flagged and users could choose to include/exclude them from search results. Inclusion of patents was also discussed, there was some support but not all subscribers might use patents, so bundling them into an increased subscription might not be popular. Providing them as an optional priced module might be more acceptable and integrating them more like datasets.

On question 3 there was a more general discussion on indication of open access in Scopus. Use of colours to indicate different types of open access was strongly discouraged by those

at the meeting. Their suggestion was that open access articles should have "Open at publisher" or "Open in repository" to link users to different versions of the paper. Questions 2 and 4 were not discussed due to lack of time, but Susanne asked the representatives to share the questions with the wider Sherif community and forward any feedback received.

6. Date and place of next meeting

28 November 2018 in London (venue to be confirmed)