

Sherif Scopus Enhancement Group Committee Meeting

4th May 2021, 10am-12:30pm
Meeting on Teams - hosted by Elsevier

Attendees:

Sherif members:



SEGsep2020.pdf

Patti Biggs, The Francis Crick Institute - Committee secretary
Peter Bradley, University of Bath
Elizabeth McHugh, University of the Highlands and Islands - Committee chair
Robyn Price, Imperial College London
Katherine Stephan, Liverpool John Moores University

Supplier representatives:

Michaela Kurschildgen - Customer Consultant (UK North & Eire), Customer Success Manager
Kai Wan - Senior Product Manager, Scopus
Isabel Butt - Product Manager (UK based)
Katya Kulakova - Product Manager
Lea Michaels - Senior Product Manager (UK based)

Apologies:

Rupal Malde - Customer Consultant Elsevier, Academic & Government Market UK South
Ryan Cronin, University of Cambridge
Laurian Williamson, University of Leicester

1. Welcome and Introductions

Elizabeth welcomed everyone to the meeting. Everyone briefly introduced themselves, as there were a number of new Elsevier representatives on the call. Elizabeth gave a brief introduction to Sherif and the purpose of the group.

2. Minutes of the last meeting - 21st September 2020

Minutes of the minutes were approved as an accurate record. There was one outstanding query on page 4, item 5 Crick: the name of the specialist had still to be confirmed. This was confirmed by email after the meeting as Andrey Loktev (not Andrea Loktev as written in previous minutes).

3. Matters arising:

Action	Action	Response
1	Provide a use case for clickable keyword- from Aug 2019 meeting	No response Cranfield University. Elizabeth will raise this again with them
2	Any institutions wishing to opt out of A/B testing should contact Charles Martinez	No information available, Michaela will try to get numbers from Charles
3	To share information on 2021 roadmap when it is available	On today's agenda
4	To put Robyn Price in contact with Seb who can answer her questions on the definition of Bronze OA	This is now clarified
5	To contact Kai Wan if your institution wishes to participate in beta testing the new Scopus platform	No volunteers came forward, but call is still open. Please contact Kai or Michaela
6	Send examples of mis-merged profiles to Iana Tsandev for investigation	Was done

7	To communicate any changes for metrics, especially those relating to Leiden Manifesto	Action believed to be with Iana Tsandev- Kai will follow up with her
8	Raise need for exportable search strategies with UX team and report back on any progress with this to next meeting	Katya will be responsible to for this and will take this forward
9	To raise with Iana Tsandev any specific concerns over early view papers not appearing in Scopus	No update from either William Farrell or Iana Tsandev on any articles in press that were not appearing. Michaela will request an update
10	Send slide deck to Secretary for minutes	Was done promptly after the meeting. Patti expressed her thanks to Kai as it makes doing the minutes much easier.

Following on from previous minutes Kai confirmed that have the journal's copyright statement for abstracts is a legal requirement, but it can be either in the abstract text or displayed in a separate abstract copyright field. When the new search engine (Knowledge graph) is implemented Kai is intending to implement the separate field, however it will take time to apply this to all records already in Scopus.

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

Kai started the update by introducing the new expanded team of product managers for Scopus, all of whom were attending today's meeting. Scopus is undergoing a major replatforming, which has been a massive task for Kai, largely solo, so the new team members are a sign of the commitment to Scopus. Each of the team members will be focussing on specific areas of product development:

- Isabel Butt on profiles, both author and institutional
- Katya Kulakova on document search and user workflows
- Lea Michaels on wider aspects of the platform such as home page, alerts and APIs
- Kai will be focussing on the sources pages, books, article level metrics and the document details page.

Kai Wan then provided a review of the changes that had been made since our last meeting. Scopus has improved the granularity of its information on **Open Access** by using data from Unpaywall. Users can now filter their results by specific types of open access. The definitions used for search facets are:

Open Access (OA) labels and definitions in Scopus (article-level)			
Proposed OA terms		Definition	Examples
Facets	Information label ⓘ		
Gold	Gold (Open access-only journal)	Published version with Creative Commons license, available on publisher platform. Documents are in journals which only publish open access	<ul style="list-style-type: none"> Article from Heliyon (Elsevier) Article from Global Health Action (T&F)
Hybrid Gold	Gold (hybrid journal)	Published version with Creative Commons license, available on publisher platform. Documents are in journals which provide authors the choice of publishing open access	<ul style="list-style-type: none"> Article from Reliability Engineering & System Safety (Elsevier) Article from Journal of Fluid Mechanics (Cambridge Univ. Press)
Bronze	Other free-to-read at Publisher	Published version of record or manuscript accepted for publication, for which the publisher has chosen to provide temporary or permanent free access. As these documents would normally only be available to subscribers, no Creative Commons license is attached.	<ul style="list-style-type: none"> Open Archive (Elsevier) Promotional access CHORUS
Green	Free-to-read at Repository	Published version or manuscript accepted for publication, available at repository. Documents may also be available gold or other free-to-read on the publisher platform	<ul style="list-style-type: none"> Any article with a version available in a repository identified by Unpaywall

In Advanced Search the field code "ACCESSTYPE" has been replaced with a new field "OA" with classifications for different types of open access and over 17million documents now have this new classification. The old field code will continue to work for a while, but users should move

to using the new field and update saved searches to use new field. The classification includes the ability to subdivide Green OA into 'Green Final Open Access' and 'Green Accepted Open Access'.

Another area where a lot of work has been done is **Preprints**. Preprints from arXiv, bioRxiv and ChemRxiv from 2017 to date have been added to Scopus and linked to existing author profiles as a separate tab. Preprints are not included in citation counts or metrics. They are not yet searchable via the Document Search page, Advanced search or the Scopus API. Patti asked if Scopus at some point could be a data source for preprints, ideally as a separate API feed. Kai responded yes if CRIS systems can add another feed, having them as a separate feed gives institutions the choice to ingest or not. Elizabeth ask if Scopus had any usage metrics for preprints, Kai responded that they were low, but this could be because preprints are excluded from searches. Robyn asked about how preprints were being linked. They are getting the same author ID using same process as other publications. Preprints will be included in the Author profile wizard.

During Quarter 1 of 2021 a new metric was added to the Document details page - **Views Count**. This metric has been introduced as it indicates a measure of interest within the Scopus user community and this is highly likely to be reflected in citations in future. At present the numbers for the current year, preceding full year and last 10 years are visible. During the second half of 2021 work will be done to make this metric available as a sort option for search results.

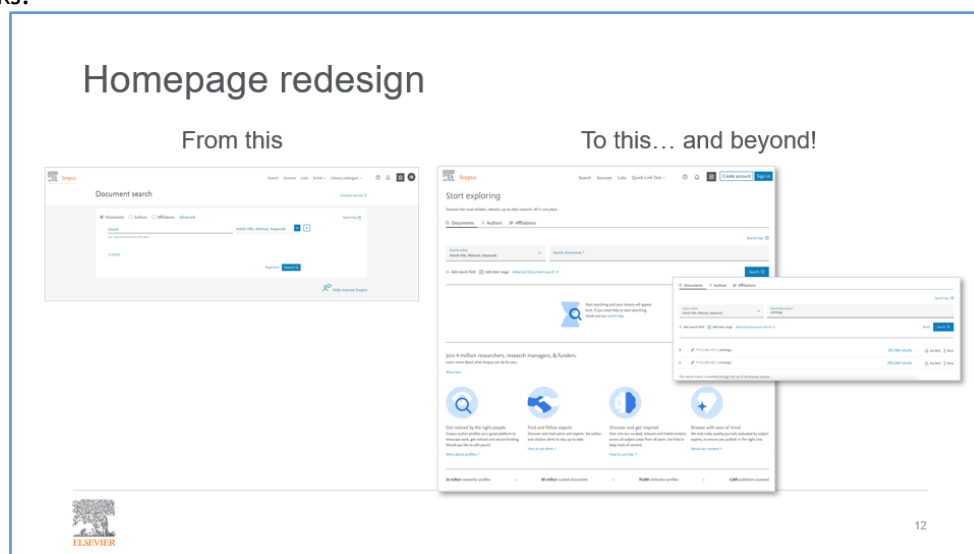
The Scopus platform upgrade is also bring a number of phased changes to the **Document details** page:

The screenshot displays the Scopus 'Document details' page for the article 'SARS-CoV-2 Entry Depends on ACE2 and TMPRSS2 and Is Blocked by a Clinically Proven Protease Inhibitor'. The page is divided into several sections: a top navigation bar, a main content area with a left sidebar, and a right sidebar. The left sidebar contains sections for 'Document type', 'Source type', 'Journal', 'ISSN', 'Language', 'Page', 'Cited by', 'Published in', 'Publisher', and 'Funding details'. The main content area includes the 'Abstract', 'Keywords', 'Topics of prominence', and 'References'. The right sidebar shows 'Metrics', 'Cited by 4280 documents', and 'Related documents'. The page is designed to be user-friendly and easy to navigate, with clear sections and a consistent layout.

The top section of page, navigation and main sections have been released. The new platform sections will be quick to update and to fix if errors are discovered. The navigation is aimed at reducing the amount of scrolling required as are the expandable sections. Gradually the rest of the page content will be moved to the new "design", this should be complete by end of June. Also during second half of 2021 Scopus will be getting a new full-text viewer/downloader. Peter asked if institutions could choose to automatically have sections such as Keywords, and Topics of Interest expanded. Kai responded that this not currently possible, it might be a future customization feature.

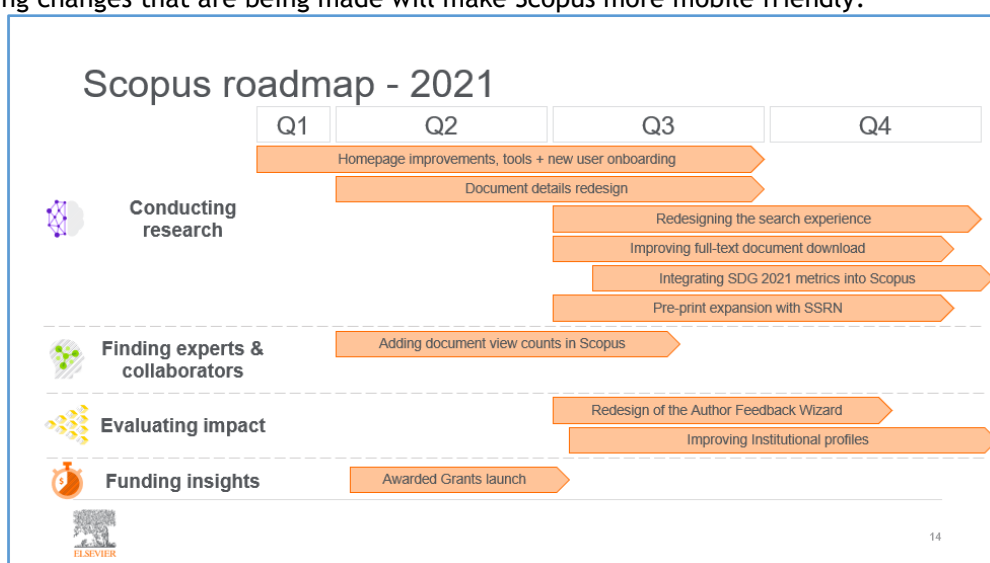
Katya then spoke to the work that Scopus has done to enhance the **discovery of funded research**. An additional 900K records now have funding data and the precision of this data has improved by taking not only the information in the paper acknowledgements, but also integrating data from UKRI Gateway to Research (<https://gtr.ukri.org/>). Another development is the introduction of funder hierarchies in search and when applying filters to research, so for instance you can now search UKRI as funder acronym and see the research funded by its component research councils, eg BBSRC, MRC, EPSRC, etc, rather than having to search for each individually.

The last section of the review looked at the Home page redesign which will be finished in the next few weeks:



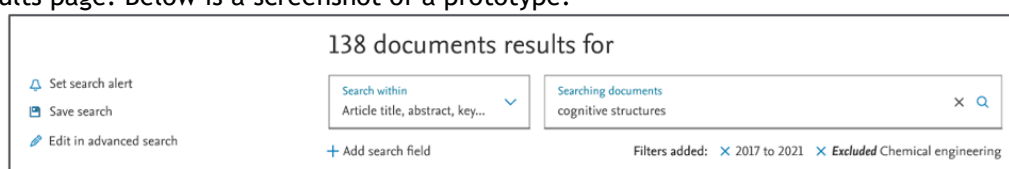
The new homepage gives information on Scopus and links to more information - this can be hidden by user. The other major change is the greater prominence of search history which has moved from bottom of the page to just under search box. The new architecture behind the pages will also make it easier for Scopus to modify views in response to user feedback.

Kai then moved on to present the roadmap for 2021. The items are given as arrows as there is some flexibility in time frames, for many there will be initial iterations, followed by improvements. The underlying changes that are being made will make Scopus more mobile friendly.



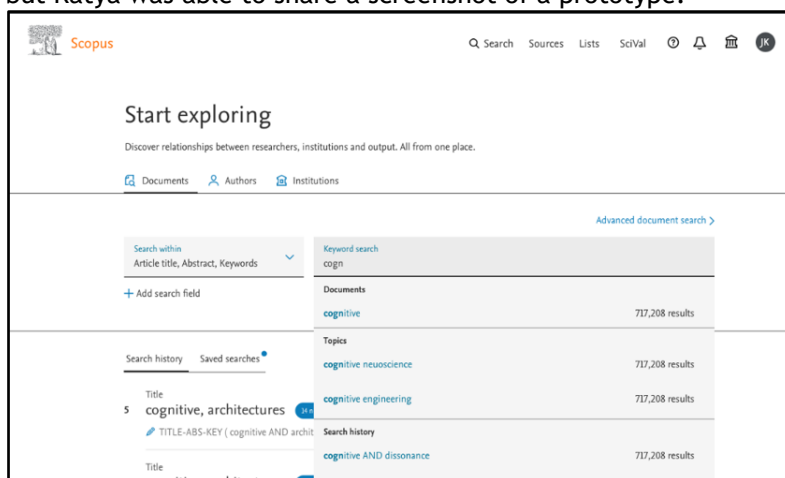
The development work has been divided into 4 streams.

Under Conducting research Katya gave additional details on “Redesigning the search experience”. In Q3 Scopus will be working to improve the search results page to increase the ease of use of the search facets, eg making it clearer which filters have been applied to the results. They will also be working to make editing search queries easier, by adding edit search options to the top section of the results page. Below is a screenshot of a prototype.



During Q4 Scopus will be enhancing the capabilities to analyse search results as these are underused at present. There will be display options to see the analysis as table, list or analytics view and quickly flick between these views.

They will also be experimenting with similar searches and suggested searches, the timing of this is not yet decided, but Katya was able to share a screenshot of a prototype:



If any institution is willing to take part in testing and provide feedback on this new functionality please contact Katya (email: k.kulakova@elsevier.com).

Katya also spoke to improvements planned to full-text document downloading. Scopus' current Document Download Manager (DDM) is going to be replaced by Mendeley Web Importer, which will substantially increase coverage of downloadable documents (details on slide). The rollout is planned for end of May, subject to testing.

Full-text document download

Currently testing integration with **Mendeley Web Importer** which will replace Scopus DDM enabling easy and accurate access to paid content and open access content through the bulk download functionality

We see substantial potential benefits in terms of coverage (Q3):

Increase coverage of downloadable full-text documents:

- Broad coverage of **Open access** (gold / hybrid / bronze) documents using the URL sources provided by **UnPayWall & 1Findr**
- A reliable **entitlement check** through the integration with **Get Full Text Research (GetFTR)** for the major publishers (representing ~50% of content)
- Access to content of non-GetFTR publishers:** browser extension makes requests for other publishers' subscribed articles through the publisher site UI using users' IP credentials

Future experiments (Q4):

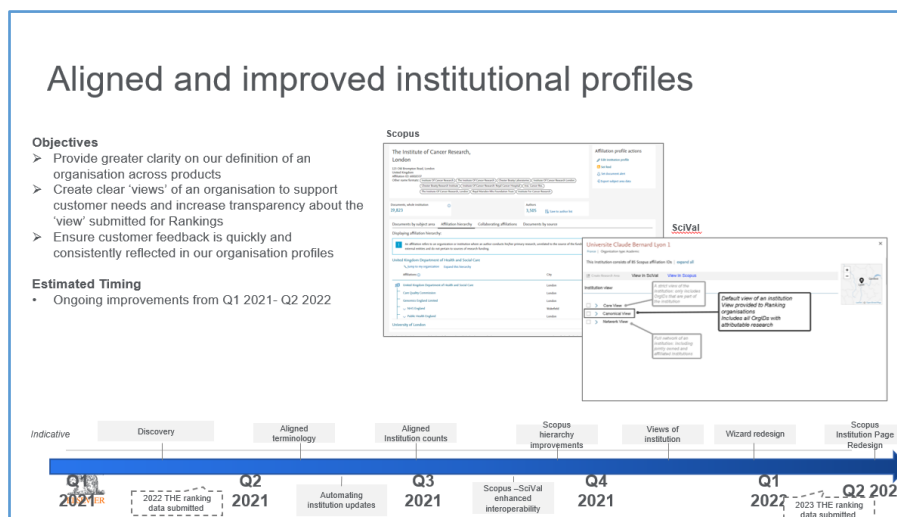
- 'View PDF' button to access PDFs directly

Katya give a little more information on the "View PDF" button. It will appear on the document details page, and is being considered as an addition to the search results page. Robyn ask how this will impact institutions using the Unpaywall add-on, it has not yet been decided whether the add-on will be replaced or both displayed near the "View at publisher" link.

Another planned area of development is the addition of awarded grants to Scopus author profiles. Isabel outlined that this would initially be rolled out region by region as a beta with a limited number of funders as the initial data set. US funders would be rolled out in June and European funders would follow later in the year. Elizabeth comment that this would be a useful feature for promotion and when seeking collaborators. Patti added that this would also be useful for CRIS systems as grant information is often hard to find. Scopus may look at assigning papers to grants later and also adding grants to institutional profiles.

Isabel will also be working on a redesign of the Author Feedback Wizard to create a simpler, smoother user journey. This will allow user to provide the only the feedback they wish to give, not have to step through a multistep process. Options to provide feedback on preprints and award grants will also be added. It is hoped that making this easier will encourage users to correct errors, so increasing the data quality and also simpler requests will shorten handling times.

Work will also be started to improve institutional profiles: Isabel will be managing this and spoke to the slide



Scopus will be working with SciVal colleagues to provide improved clarity and better alignment across the two products. Another change will be the renaming institutional profiles from Affiliation profiles to Organization profiles as the term affiliation wasn't as widely understood by their international clientele. Robyn commented that better rankings in Scopus could mean that organisations could consider unsubscribing from other services, like THES Data Point. Isabel responded that Scopus does already provide data to THES as well as them gathering information from other data sources. THES uses about 30% of the Scopus data supplied, but Isabel did not know precisely what data was taken from Scopus.

A further aim of this work on views is allow institutions to define who and what should be included in their profiles. It will also give institutions ability to have different views for university, any partners, associated hospitals etc. A further reason to rename these profiles as Organisational profiles is that it is more inclusive for companies and charities.

Isabel then raised another area for discussion - **People Finder Discovery**. At present in Scopus it is easy to find people by name, but harder to identify potential reviewers or recruitment targets by area of expertise or topic. Should Scopus be providing this information? Robyn commented that Elsevier already have a separate priced product for this Expert Lookup, Isabel responded that this tool was not popular as it is a different interface. Peter wondered whether it might be better to wait for the analytics tool development as this would increase linkage of documents to people. A general comment was that it would have to provide quite specific topic areas or the results might be too broad. Robyn also raise the danger of use of irresponsible metrics being used in recruitment, Isabel was already aware of this concern. Patti raised the issue of cost impact as value for money is crucial to many organisations. Kathryn felt that such a feature in Scopus might be useful to some of her users to identify potential reviewers for journals or articles. Isabel is open to further discussion on this early proposal.

Finally Isabel talked about Scopus' implementation of **UN Sustainable Development Goals (SDG)**. Currently Scopus provides these as a series of predefined searches (based on the 2020 SDG definitions) in Advanced Document Search. Better queries have been written using the 2021 SDG definitions which will be used to produce a new SDG classifier and in machine learning to identify papers for the classifier. Scopus is looking at how these SDG classifications could be made available as search option.

Kai then introduced a couple of topics for discussion. The first was Researcher Expertise/Impact had already been discussed with Isabel and there was nothing further that the committee could identify as missing. Michaela lead on the next topic **Data** and wondered whether a closer association with data would be helpful, currently this only available separately in Mendeley Data (<https://data.mendeley.com/>). Patti commented that institutions can struggle to track and trace their own data across multiple repositories. Kai responded that a new publication type for data was being considered.

The next topic was **Awards and Grants** and Scopus which had been outlined earlier by Isabel. Robyn commented that interest in might be discipline dependant, STEM focussed organisations like Imperial are interested in details of grants. The big issue is that the data available about grants not consistent across funders. Isabel would like help identifying key funders for UK researchers, so these could be targeted.

Kai then opened floor for anyone to provide feedback or comments on Scopus. Robyn asked if it might be possible to **search by publisher**. Librarians need details of how many papers their organisation publishes with specific publishers when assess the value of Read and Publish (R&P) deals. Currently it isn't possible to do this in Scopus as it has no publisher data, librarians are using DOI prefixes as a proxy for publisher. Elsevier took this away to consider, acknowledging that it might be difficult to do as publishers change name. For most R&P deals librarians are only interested in latest 5 years, so this time frame may reduce this issue. While consider additional search fields Isabel added that she is also thinking about corresponding and first author information.

Another discussion was on **integrating different document types** into a single search. The committee thought this would be useful providing the types are clearly labelled and that users could limit to or exclude specific types from search results. Robyn raised linking preprints to published versions, many researchers would want users not to see a preprint if a published version was available. This is difficult technically as you need to consider tolerance levels and levels of certainty. The committee felt that 80% match confidence would be acceptable. Another suggestion was that the ability to link a preprint to its published version might be added to the author feedback wizard. Katherine added that the easier discovery of preprints would be useful when demonstrating Scopus.

The final discussion was on **new content types**. Peter suggested Clinical trials. The question was whether Scopus should track citations of clinical trials and include these in institutional citation counts. It was felt that it would be useful to link clinical trails to publications arising from them, but that citation counts for clinical trails should kept separate (like preprint citation counts). There was a similar discussion on citations of research data sets, this is much more complex as different regions of world have different practices for recognition of impact of data sets.

Finally there was praise for the API support portal documentation and worked examples provided which Robyn had found very helpful

5. Queries and Comments from Sherif members

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

University of Liverpool : Lea agreed to take this query away and investigate why this system error took a long time to resolve,. She will also see if other institutions have report similar incidents. Katya added that Scopus have been working on getting quick pass through of tickets from helpdesk to technical support. Peter reported that he had had similar issues with long query search and use of facets in simple search, but had found that using Advanced search was a solution for him. Lea request that Liverpool supply the ticket number and an example of the search which caused the error to help her investigate further. Elizabeth will ask Liverpool for this by the end of the month. Lea will provide a written summary of was discovered.

University of Plymouth: first comment was praise to the new interface. Scopus were grateful for this positive feed back. The issue of export limits has been raised before, Kai reiterated that the

Export function is going to be rebuilt and once rebuilt the limit can be scrapped. He hopes by the next meeting to have more news on this. A question was asked about why the limit was an issue, more and more disciplines (not just medicine) are now doing Systematic Reviews which rely on retrieving all possible references relevant to the topic, which is often many more than 2000. Use of the API might be a solution for some, but not everyone has technical expertise or help available to use the API. Paging results does make it easier to export large result sets by breaking it down into multiple sections. Kai reported that Export limits is in Scopus' top 3 of issues to resolve.

6. AOB

The only item was meetings as pandemic restrictions are gradually being lifted. Elizabeth proposed that the committee meet face to face in summer and that winter meetings should continue to be online. This was accepted.

7. Date and place of next meeting

Date - Elizabeth will send poll of potential dates for Oct/Nov 2021 to committee members.

Tuesdays or Wednesdays were preferred by most participants.

Venue - Online via Teams

Postscript: Date of next meeting after polling - Tuesday 2 November 2021.

Actions for next meeting:

Action	Page ref*	Action	By whom
1	P1:I3 action 1	Provide a use case for clickable keyword - from Aug 2019 meeting..	Elizabeth McHugh to make final request to Cranfield University for this
2	P1:I3 action 2	To ask Charles Martinez for numbers of UK institutions opting out of A/B testing	Michaela Kurschildgen
3	P1:I3 action 5	Call for Beta testers of new platform is still open. Contact Kai Wan (email: K.Wan@elsevier.com) if interested.	Any Sherif member
4	P1:I3 action 7	To follow up with Iana Tsandev on communication of any changes in metrics	Kai Wan
5	P2:I3 action 9	To follow up with William Farrell and Iana Tsandev for feedback on concerns over early view papers not appearing in Scopus	Michaela Kurschildgen
6	P5:I4	Volunteers to test new search functionality to contact Katya Kulakova (email: k.kulakova@elsevier.com).	Any Sherif member
7	P6:I4	Views on proposals for expertise to be added a search option. Please feedback to Sherif committee for next meeting or to Isabel Butt (email: i.butt@elsevier.com)	Any Sherif member
8	P7:I4 m	To produce a list of key UK research funders, consulting as appropriate and send this to Isabel	Sherif representatives on committee
9	P4:I5 Liverpool	To request ticket number and pass this to Lea Michaels (email l.michaels@elsevier.com)	Elizabeth McHugh
10	P4:I5 Liverpool	Lea to investigate this ticket and similar reported incidents and feedback in writing to Elizabeth who can forward to Liverpool University	Lea Michaels

	P8:I5 Plymouth	To provide timeline and more information on the export rebuild	Kai Wan
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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 Institutions: October 2020 - May 2021

University of Liverpool feedback

It was an issue with the resource that affected my teaching and that of the searching capabilities of the students who use the database.

I'll explain a little about the fault.

I initially got in touch with their helpdesk on 15th March 2021;

Hi helpdesk, can you tell me if you are having issues with the use of your Scopus resource within Google Chrome? I have hosted a teaching session last week whereby I do a long initial search, with lots of OR boolean operators, we view the results and when it comes to returning to the Search Screen to view the search history, and add additional kw's it persistently comes up with an error message and tells me to contact you. (this happened multiple times on the day) I tried the process again before a teaching session tomorrow, and it has continued to happen. I have used Microsoft Edge browser instead, and it has been ok. I'm concerned about the browsers our students are using to access the resources and if I have to give them warning that there is an issue with Chrome the use of your product. Thanks in advance.

This was ongoing and it didn't matter what browser I used, the error was still there. A ticket from my initial enquiry was created, however, they didn't get back to me until 22nd March, (with a sincere apology) due to receiving a high volume of tickets.

I sent over a screencast on that same day, with my search string for them to look at.

The Customer Experience Champion I dealt with was very helpful and more or less immediately sent me a work around for the issue, as it was a known problem and they were working on it. (this tells me many others had submitted tickets of the same nature.)

It did mean that I had to circulate this to very many of my Health Sciences cohorts, in order for the students to be aware that their searching approach had to differ slightly at this time.

Thankfully there weren't too many queries or complaints!

It did take Scopus until the 1st April to further contact me and let me know that the issue was now resolved.

I appreciated the contact from the Customer Experience Champion, however my concern and why I wanted to keep you in the picture, was more to do with the length of time it took SCOPUS to fix the known issue, at a key time for students who needed to use the resource. It would be interesting to know if this was something that other institutions had an issue with at this time and if SCOPUS foresee this being an issue in the future.

Many thanks in advance for any feedback you are able to minute/share after the meeting in early May.

University of Plymouth Feedback

"New interface looks nice and highlights use of fields in advanced search. Have noted new funder institutional information in there... look forward to pointing this out to researchers."

'It would be nice to increase the number of records that can be exported to Endnote to more than 2000 at a time. If you can ask them about that and let us know their response, that would be great.'