ODI Conformance Checklist: Content Provider

Content providers are encouraged to take specific measures to assert their conformance with NISO RP-19-2020, the recommended practices of NISO's Open Discovery Initiative. These measures are voluntarily made by each organization, in an effort to increase transparency and communications around pre-indexed or "web-scale" library discovery services. The ODI Conformance Checklist below was created to enable standardized methods for content providers to assert their ODI conformance to libraries, discovery services, and other industry stakeholders.

Market product(s): IEEE *Xplore* Publications_____

Organization name: IEEE_____ _____ Date: _March 17, 2021_____

Contact information: _Julie Zhu, zhu.j@ieee.org_____

Y/P/N	Recommendation	Reference	Comment
Y	Content Provider makes core metadata and underlying full-text/original content for complete offerings available to Discovery Service Providers.	3.2.1.1 (1)	
Y	Content Provider makes the core set of metadata elements and content item (full text, transcript, etc.) for each item submitted for indexing available to Discovery Service Providers.	3.2.1.1 (2)	
Y	Title	3.2.1.2	
Y	Authors	3.2.1.2	
Y	Author Identifier	3.2.1.2	
Y	Publisher Name	3.2.1.2	
Y	Volume	3.2.1.2	
Y	Issue	3.2.1.2	
Y	Page(s)	3.2.1.2	
Y	Date/Date Range	3.2.1.2	
Y	Item Identifier	3.2.1.2	
Y	Component of Title	3.2.1.2	
Y	Component of Title Identifier	3.2.1.2	
Y	Item URL	3.2.1.2	
P	Open Access Designation	3.2.1.2	Our articles do have an Open Access Indicator, but it does not yet follow the <free_to_read start_date="2015-02-03"/> format. We are working on it.
Y	Content Type	3.2.1.2	
Y	Content Format	3.2.1.2	
Y	Language	3.2.1.2	
Y	Indexing Data	3.2.1.2	
Y	Full Text/Transcript	3.2.1.2	
Y	Abstract/Description	3.2.1.2	
Y	Content Provider provides libraries, on request, with a statement of participation in the discovery services, including disclosure of coverage depth and content depth.	3.2.2	

Y	Content Provider's agreements with Discovery Service Providers do not include NDAs.	3.2.3	
Y	The transfer of Content Provider's data to Discovery Service Providers makes use of existing standards where applicable and uses one of the metadata encoding schemes listed in 3.3.3.	3.2.4	
Y	Content Provider provides data to support OpenURL resolution (ANSI/NISO Z39.88-2004 (R2010) *The OpenURL Framework for Context-Sensitive Services*). The resulting OpenURL should link to the item itself, or as close to it as possible in the content provider's site structure.	3.2.5	
Y	Content Provider provides clear channels for reporting discovery related support issues.	3.2.6	

Instructions

Completion of this checklist requires adding the following responses to the first column of the checklist above:

- A "Y" (for Yes) indicates conformance with the indicated paragraph of this Recommended Practice.
- A "P" (for Partial) indicates partial conformance for which explanatory comments should be entered in the last column.
- An "N" (for No) indicates that the content provider does not conform with the recommendation. Explanatory comments may be added for any response.

One checklist can be completed either per organization or per market product, as content providers see fit. This document can be reformatted as needed and published in a variety of file types. For each recommendation, additional background is offered in the referenced sections of the Recommended Practice. These recommendations include additional tables, representing granular details associated with each item, and content providers are encouraged to use these tables to provide enriched insights into their involvement in library discovery services; these are not, however, required for the completion of this checklist. Supplementary details, commentary, and materials are also encouraged in the last column, but these are not required. If you have questions or need assistance, please contact odi@niso.org.

Scope

Content providers are organizations that offer content products or services, primarily intended for access by library patrons or the general public. The content provided by these organizations is used to generate the central indexes associated with the discovery services. Content providers include commercial and non-profit organizations. Many different access and license models may apply, including those restricted to individuals affiliated with subscribing organizations and those based on open access licenses.

About the Open Discovery Initiative

Nurtured by the National Information Standards Organization (NISO), the Open Discovery Initiative (ODI) aims at defining standards and/or best practices for the new generation of library discovery services that are based on indexed search. These discovery services are primarily based upon indexes derived from journals, ebooks and other electronic information of a scholarly nature. The content comes from a range of information providers and products—commercial, open access, institutional, etc.

Given the growing interest and activity in the interactions between information providers and discovery services, a more standard set of practices is required for the ways that content is represented in discovery services and for the interactions between the creators of these services and the information providers whose resources they represent.

The Recommended Practice was created by members of the ODI Working Group, which completed its work in June 2014 with the publication of NISO RP-19-2014. NISO constituted a new Open Discovery Initiative Standing Committee following the approval of the ODI Recommended Practice. This standing committee has worked to facilitate the adoption of the principles of the Recommended Practice and to promote the adoption of conformance statements from discovery service providers and content providers. The committee has extended the work of the ODI Working Group by conducting additional surveys addressed to Content Providers, Discovery Service Providers, and to libraries to gather more extensive and recent data regarding the content discovery environment and to identify interest in enhancements to the Recommended Practice. Informed by these survey responses, the ODI Standing Committee has developed a revision to the Recommended Practice, NISO RP-19-2020.

The ODI Standing Committee is charged with the following tasks:

- Promotion and education of ODI Recommended Practice for all stakeholders
- Support for content providers and discovery service providers during adoption and completion of conformance checklists
- Provide a forum for ongoing discussion related to all aspects of discovery platforms for all stakeholders
- Identify emerging needs in the open discovery space and determine appropriate courses of action

- Make recommendations to the IDI (Information Discovery & Interchange) topic committee on further work items required to fulfill the goals of the Open Discovery Initiative

To learn more about ODI conformance, visit the [Open Discovery Initiative workroom](#) and download [NISO RP-19-2020](#).