Open Discovery Initiative (ODI)

About the Open Discovery Initiative (ODI)

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.

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

Rowan University Libraries ODI Conformance Checklist

Libraries 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 libraries to assert their ODI conformance to content providers, discovery services, and other industry stakeholders.

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Y/P/N	Recommendation	Reference	
Y	Library designates individuals to be responsible for configuring Discovery Service, link resolver, proxy, and other discovery-related tools for	3.4.1.1 (1)	

	subscribed content from Content Providers. Designated point persons should work or coordinate with each other.		
Y	Library enables linking, ranking, and authentication options available in the Discovery Service Tool for subscribed content from Content Providers, and seeks clarification if needed.	3.4.1.1 (2)	
Y	Library documents configuration decisions and the reasons behind these decisions.	3.4.1.1 (3)	
Y	Library regularly evaluates and updates its configurations of Discovery Service configurations.	3.4.1.1 (4)	
Y	Library plans for system upgrades and seeks assistance from vendors if needed.	3.4.1.2 (1)	
Y	Library plans and documents for discovery tool changes and seeks assistance from vendors if needed.	3.4.1.2 (2)	
Y	Library selects the correct database collections available in the Discovery Service tool for subscribed content from Content Provider and seeks clarification from the Discovery Service Provider and Content Provider when needed.	3.4.1.3	
Y	Library works with the Discovery Service Provider to learn exactly what, if any, adjustments can be made to result ranking, boosting, and weighting, and seeks clarification if needed.	3.4.1.4	
Y	Library selects the correct holdings packages available in link resolver for the subscribed content from Content Providers and seeks clarification from the link resolver provider and Content Provider when needed.	3.4.1.5 (1)	
Y	Library regularly evaluates and updates its configurations of library link resolver configurations.	3.4.1.5 (2)	
Y	Library configures the proxy server for discovery services and link resolvers, and seeks clarification if needed.	3.4.1.6	
N	Library works with vendors to create detailed agreements on what support the provider offers during and after implementation.	3.4.2.1	
P	Library regularly checks and evaluates ODI Conformance Statements from Content Providers and Discovery Service Providers and publisher-provided configuration guides for libraries.	3.4.2.2 (1)	We will check Content Provider ODI conformance statements as they become available.

N	Library advocates increasing ODI conformance for Content Providers and Discovery Service Providers.	3.4.2.2 (2)	
P	Library uses the vendor-provided tools to report missing, incomplete, or incorrect database collections, first to the Discovery Service Provider, and next to the Content Provider.	3.4.2.3	We contact content providers as needed
Y	Library develops and executes a staff training program for one or more staff members on managing the Discovery Service, link resolver, proxy, and other discovery-related tools.	3.4.3.1 (1)	
Y	Library provides regular training sessions to patrons and staff on how to use Discovery Service tool.	3.4.3.1 (2)	
Y	Library staff read official documentation, announcements, and updates, and make relevant adjustments in configurations.	3.4.3.1 (3)	
Y	Library staff join the online communities (listservs and forums) for the Discovery Service Providers, engage in dialogue, offer ideas and suggestions, and share innovative approaches created or implemented.	3.4.3.1 (4)	
Y	Library staff on licensing, electronic resources, systems and front service regularly meet to discuss configuring Discovery Service, link resolver, proxy server, and other discovery-related tools for subscribed content.	3.4.3.2	