

e.g. Sherif Scopus Enhancement Group Committee Meeting

26th January 2022, 10am-1:00pm

Meeting on Teams - hosted by University of the Highlands and Islands

Attendees:

Sherif members:

Patti Biggs, The Francis Crick Institute

Peter Bradley, University of Bath

William Farrell, University of Leicester

Elizabeth McHugh, University of the Highlands and Islands - Committee chair

Katherine Stephan, Liverpool John Moores University

Supplier representatives:

Michaela Kurschildgen - Customer Consultant (UK North & Eire), Customer Success Manager

Isabel Butt - Product Manager (UK based)

Katya Kulakova - Product Manager

Charles Martinez - Key Account Manager

Lea Michaels - Senior Product Manager (UK based)

Apologies:

River Cronin, University of Cambridge

Robyn Price, Imperial College London

Peter Bradley - for needing to leave meeting at 12:15 due to another commitment.

1. Welcome and Introductions

Elizabeth welcomed everyone to the meeting, especially William Farrell who has taken over from Laurian Williamson representative from University of Leicester. Elizabeth noted that Patti Biggs has stepped down as Secretary for the committee, although she would continue as a committee member. She thanked Patti for her years as secretary. Traditionally Sherif provides the secretary, but that no other volunteer had come forward from the Sherif members, so there was no formal note taker for this meeting. It was agreed that rather than formal minutes, some notes would be put together between chair and Elsevier. Elizabeth asked if Elsevier might be able to provide secretarial support for the next meeting.

Postscript: after the meeting Elizabeth and Patti discussed over email need for minutes and workloads. Patti agreed to do this final set of minutes with help from Michaela's notes - which have formed basis of items 5 & 6.

2. Minutes of the last meeting - 4th May 2020

Minutes of the minutes were approved as an accurate record.

3. Matters arising:

Action	Action	Response
1	Provide a use case for clickable keyword- from Aug 2019 meeting..	No response Cranfield University - agreed to close this action.
2	To ask Charles Martinez for numbers of UK institutions opting out of A/B testing	No institutions had opted out.
3	Call for Beta testers of new platform is still open. Contact Kai Wan (email: K.Wan@elsevier.com) if interested.	Kai has left. Lea is taking the work on new platform forward. A large number of changes are being trialled.
4	To follow up with Iana Tsandev on communication of any changes in metrics	Isabel will speak on this later
5	To follow up with William Farrell and Iana Tsandev for feedback on concerns	Resolved

	over early view papers not appearing in Scopus	
6	Volunteers to test new search functionality to contact Katya Kulakova (email: k.kulakova@elsevier.com).	Complete
7	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)	Still in progress - workflow on search has been a priority
8	To produce a list of key UK research funders, consulting as appropriate and send this to Isabel	Ongoing
9	To request ticket number and pass this to Lea Michaels (email l.michaels@elsevier.com). Lea to investigate this ticket and similar reported incidents and feedback in writing to Elizabeth who can forward to Liverpool University	Resolved. Lea asked that any other long response times to be reported to her.
10	Kai to provide timeline and more information on the export rebuild	Done

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

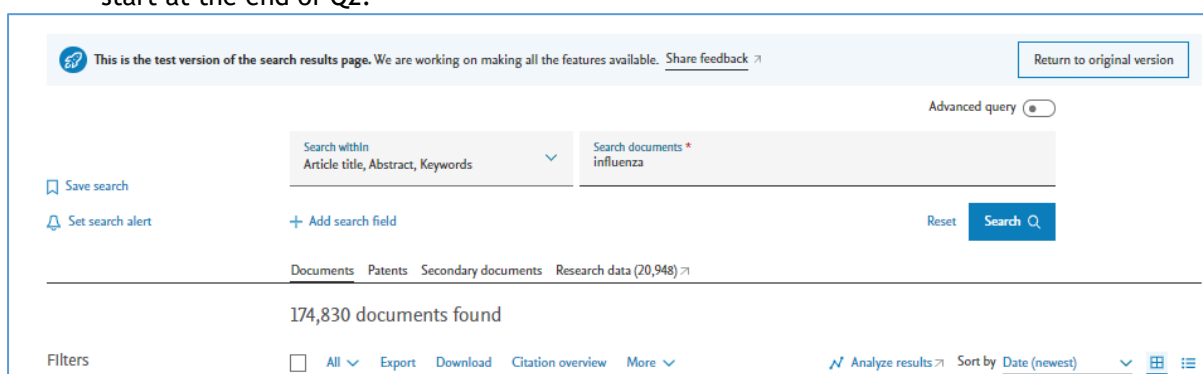
- a) Since the last meeting Lea reported that Kai Wan has left Scopus. Elena Zudilova-Seinstra (e.zudilova-seinstra@elsevier.com) is now the product manager with responsibility for sources pages and document details. Scopus also has a new director - Yoshiko Kakita (y.katita@elsevier.com) who is based in Toyko.
- b) Katya reported on changes introduced to **access document full-text**. The integration with Mendeley Web Imported (MWI) had been stopped as it produced unsatisfactory results when compared with Scopus' Document Download Manager (DDM). There is planned work to improve the mechanism behind downloads in DDM. Other changes had been made to the document details page:
- View PDF link introduced - appears if you have known entitlement to full text
 - Full Text Options link introduced - includes View Repository version if a green version is available. The Download link will also be moving into this menu.
 - Position of toolbar has changed. It sits below metrics and above abstract. Elsevier would like feedback on this placement and for users to report any broken links to full text that they find. **ACTION:** All SHERIF members
- c) Isabel report on the **Author Feedback Wizard (AFW)**. This has been changed to provide a more intuitive workflows, so quality and accuracy of profiles are improved. The info in profiles is now in modules, so it can updated more easily and quickly, so reducing turnaround time for profile change requests. The AFW has also been amended, so users can provide feedback on preprints and awards granted in their profile. Patti asked about changes to selectable affiliations, in the past any affiliation in Scopus could be selected, now only affiliations which have already been used in publications can be selected. This means that an author who moves institution can't be associated with their new institution till they have published a paper, which might be a year or so. Scopus to look at feasibility of allowing authors to add current location and current contact details to their profiles, this would need GDPR permission.
- ACTION:** To invite the Product Manager of the Privacy Centre to next meeting.
- d) Lea reported on work on **Sustainable Development Goals (SDG)**. Papers in Scopus are mapped to SDGs and these mappings were refined during 2021. The SDGs are viewable in the document details page, you can jump to the section via document section menu, then expand to see the SDGs assigned. Clicking on the SDG will open a pop-up side panel with a

fuller definition of the SDG and a link to SciVal SDGs. On the SciVal page non-subscribers have free access to keywords (presented as word cloud), top 5 topic clusters and information on most active institutions and countries with trends. The Analyse in more detail link will give SciVal subscribers greater detail. In Advanced search the SDG's are a series of preconfigured searches. Work on SDG is ongoing: it will be possible to export SDG labels in future, filter on SDG and to include SDG document counts on organizational and author profiles. Peter commented that these advanced searches are based on 2020 terms and that there is not access to the definition from this page. It would be nice is each search had an information button with link to definition and were updated to the 2021 terms. Lea responded that the 2021 version has been delayed by the search migration, but will probably be available later in 2022. The searches for 2021 are much longer as have machine learning elements included, further information on the searches can be found at <https://elsevier.digitalcommonsdata.com/datasets/9sxdykm8s4/4>

- e) Isabel reported on **Policy citations in PlumX**. Scopus have partnered with Overton to add policy citations which demonstrate the societal impact of research which is useful for REF and other assessment exercises. Policy citations can be found in the metrics section of the document details paper.
- f) Finally Isabel reported on progress with **Awarded grants**. USA grants have been added as a beta, they appear in author profiles as a separate tab. Work is happening this quarter to start expand this globally adding grants from key funders such as UKRI and EU, but is being a prolonged process as the data is rather messy. Information on Awarded grants project can be found in Scopus' FAQ at https://service.elsevier.com/app/answers/detail/a_id/33556/supporthub/scopus/kw/Awarded+grants/.
- g) Lea then moved on to introduce the **Scopus 2021-22 roadmap**. Much of the work on it is under the hood as it relates to the move to the new platform which will make Scopus more stable and faster.

NB: Since our meeting the Scopus blog has had a posting with information on roadmap: <https://blog.scopus.com/posts/scopus-roadmap-whats-coming-up-in-2022>.

- h) Katya spoke to the work which will improve the **search experience**, this includes the introduction of a new search results page which will be tested during Q1 (c1-5% of users will get a banner inviting them to use new version and provide feedback) and rolled out will be start at the end of Q2.



Major features of the new page will be

- ability to edit the search from the results page
- see the query either as standard search or the search string from advanced search and copy your query to advance mode for further editing
- Ability to view results as list or table
- Some filters will be applied automatically eg date ranges, others will retain Limit to/Exclude buttons

Peter praised the new look and was looking forward to using it. When the migration is complete additional filter facets may be available, Patti would like to see the ability to limit by when record added to Scopus, which is currently an option on search page

- i) Lea described the plans for **New Combined Queries** on search page. Queries will be selectable by ticking a box rather than having to type set numbers. This will be developed during Q2 and is planned for release in Q3. In the search box the set numbers will appear with selector for operator. Kathryn asked if the actual queries could be used rather the numbers, Lea felt this might be difficult if the search queries were long ones, but will experiment with this. Michaela commented that many customers had asked for easier search combination, so she was delighted to see this coming.
- j) Isabel stated that the Scopus team are very aware of issues with CSV exports, especially when splitting information into columns and the fact that additional content cannot be added to the export. To address this they are **rebuilding the Export service**, which is a large piece of work. The aim is to remove (or make easily fixable) the column split problem and to open opportunity to add more fields to the export, such as metrics. These changes are expected to start rolling out in Q2. Scopus are also evaluating whether it will be possible to change the export limit, but need more time to do this.
- k) Finally in this section of the meeting Isabel introduced **Researcher Discovery**, an addition to Scopus which is currently being piloted. Her slide below outlines the drivers for this development.

Researcher Discovery *In Pilot*

- Tackling complex societal challenges requires **diverse, multi disciplinary teams**
- **Digital tools and data** can support researchers to develop essential skills to build their **networks and collaborations**
- Researcher discovery is a **smooth and streamlined** workflow to help users find partners and collaborators

The slide includes a screenshot of the Scopus 'Matching researchers for' interface. The interface shows a search bar with 'Test search' and a 'Search' button. Below the search bar, it displays 'Results based on matching documents since 2016'. There are filters for 'Matching documents from' (The year, Last year, Last 3 years) and 'Country' (Type country name, United States, United Kingdom). The results table shows:

Author information	Number of matching documents	Total citations	Total documents	View
Chen, Xue B University of Texas Health Science Center at Houston, United States Profile page	11	6475	102	17
Shenoy, Manoj K University of Cambridge School of Clinical Medicine, United Kingdom Profile page	11	3422	195	46
Shenoy, Wilbur D The University of Queensland, Australia Profile page	11	1028	167	36

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Researchers often seek collaborators (for research projects and grants) and reviewers from author profiles; it can be done in Scopus, but is a long winded and involves accessing multiple pages. Scopus is trailing a researcher workflow to do this more seamlessly. A second phase of the project would look at possibly visualising networks. Isabel asked for the groups comments and reactions. William commented that staff who have Scopus for this have said that having a country filter would be very useful. Patti commented that this development would be another driver for Scopus to add fields for current address and contact details, not just information from last paper. Lea asked if there had been appetite for data on grants to be included here: yes, there had and also for preprints to be included too.

Postscript: Since our meeting a Researcher Discovery pilot was launched in India in April 2022 and another will be launching in Australia and New Zealand in July. No information yet on any pilots in Europe.

5. Queries and Comments from Sherif members

The feedback received from Sherif members before the meeting is included as appendix A. Peter had some of additional queries which were taken first as he needed to leave the meeting at c12:15pm. These are Michaela's notes with minor edits from Patti.

a) **Peter's Queries** on multiple accounts, syntax error messages and search precision:

Multiple accounts problem: a user had the situation of 2 personal accounts being created for Scopus. Is it possible to merge accounts and keep access to content, search alerts and saved searches?

Lea: In short: sadly no. On early stage Elsevier decided to link a user to one email address only, but we are discussing this. Reviewers e.g. often have different email accounts and would like to be seen as one person. Maybe there might be some kind of merge service available we did not come across yet. This is under discussions.

Peter: This is causing problems at trainings when email is send to user but access is not possible. Is it possible to change the affiliation or decide which one to use?

Lea: Your personal account needs to be affiliated to account which is the requirement. The reason this is difficult to solve is that we don't know this specific person and we can't just merge user profiles then. Lea will check internally, but be prepared it may be a no. We do realize that it's painful to add everything manually to one account indeed.

Syntax error messages when searching: It says it's a technical error and the reason for an error message does not reflect correct reason.

Katya: We looked at error messages overall and we will pick this up once we completed the search changes. We want to find a smarter way which helps people to find mistakes themselves.

Advanced search is based on old technologies and any changes are quite difficult to process for us. Our plan is to adjust the mechanism and to identify what's exactly wrong.

Precise phrase search: Students use loose phrase search mostly

Katya: I would like to learn more on why there is a need to change the precise search? Please share an example, Peter. This is relevant to new search engine, we need to find out how asterisk etc works. **ACTION:** Peter

Peter: with speech marks you can get results, but not always with exact search ie with[.] for precise and { } for very precise matching

Lea: When the error message is unhelpful share screenshot with Lea, please. We will add to our priority list, advanced search is hard to change, very slow. **ACTION:** Any Sheriff member

b) **Crick's queries from Patti** - see Appendix 1

Search history and combine searches: changes are coming as detailed in item 4i.

Multiply records and EIDs for some papers: several records for one paper or books

The problem is they are getting into CRIS system multiple times, sometimes merging correctly and sometimes not. It's a lot of work to de-duplicate and clean-up in our CRIS system manually. If corrections are made do you have a mechanism to push corrected records to CRIS system?

Lea: not 100% sure, so I will investigate if the API can send corrections. I will let you know. **ACTION:** Lea

c) **University of Birmingham:** Queries detailed in Appendix 1. Response and discussion are noted here.

Author level metrics: Why are FWCI not shown for papers?

Isabel: FWCI is not suitable for small amount of papers (skewed). We are concerned this metric might not be appropriate. How do you use metrics responsible?

William: I tend to go for the Scopus decision reg responsible use of metrics, but I suspect people will keep asking this.

Katherine: In my view its biased to use H-index, but I argue to use FWCI. I might say to a researcher: don't worry if your H-index is low it's a flawed metric but I can see why people suggest it.

Isabel: When assessing researchers you need to use a range of metrics to assess and not just a single metrics. We look at new metrics like the contribution score on a paper (normalise citation practice. On author level we are thinking about other metrics which are cropping up on evaluations, do we miss something?

Katherine: Is sharing her screen: Author profile results (keeping in mind DORA), why is H-index on this result list? This is not responsible in my view.

I like Elsevier guidance on sharing responsibly which I am using or sharing often.

Patti: Responsible metrics are important. The Crick is not showing H-index in our CRIS system. For people in early stage career the h-index does not reflect on how good a researcher is. As a signatory of DORA, we assess what they published, not where ie we focus on the title of article rather than a journal name. The title of a paper is the most prominent element in our CRIS system and when we present publications on our website.

Isabel: paper on researcher evaluation: <https://thebibliomagician.wordpress.com/2019/05/15/the-blind-and-the-elephant-bringing-clarity-to-our-conversations-about-responsible-metrics/>

Katya: we received comments to make FWCI more visible / higher on article page without having to scroll down. We did not hear that FWCI needed for search results.


Isabel: If FWCI is shown on author page you have to make sure its used carefully.

6. Topics for Discussion

Lea then introduced 5 topics for discussion which are detailed in the slide below:

Topics for Discussion

- **Systematic Reviews** – planning to run a survey to understand this workflow better and define how we can make it easier from the Scopus side. **Would you like to participate in the survey?** Let Katya know by **February 15th**.
- **Research Intelligence** – we will be working on 'Analyse results' functionality soon, we are keen to know what kind of visualizations would help you interpret the results more easily?
- **Collaboration and Networking** – we are introducing new functionality to support researchers with collaboration and networking. How do you currently support this at your universities?
- **Scopus data in CRIS** – how is the need for metrics around impact and benchmarking changing?
- **Societal Impact** – how important is this at your universities and what are you missing?

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These are Michaela's notes with edits from Patti.

a) Systematic Reviews

Lea: we are trying to understand systematic reviews better.

Elizabeth: The big issue I hear from health librarians is the limitation of exporting large numbers of results (currently capped at 2000 with abstracts). Many are not able to engage with APIs. Could be made easier?

Katya will be launching a survey and asked for volunteers by 15 February. Most of the group volunteered, so she will send the survey link. **ACTION:** Katya

b) Research Intelligence

What kind of analytics and visualization would be helpful? Katya will be working on this within the next 6 months and is keen to get the groups input: **ACTION:** Sherif members to email responses to Katya

c) Collaboration and Networking

Katherine: concerned about using H-index. What is useful for us could be to show collaboration between Universities or information such as cross over between by subject areas.

What actions are taken having this information?

1. We use it to run general trainings to show what's possible (finding co-authors, where published)

2. or for different departments where do they publish and work with and then show the graphs
3. With PhD students: use if to prepare for interviews: get a feeling for what they are doing
4. Not used on universities level yet
5. I am showing this is available information, if you put it together it takes a lot of time.

Patti: I have used VOS viewer for small data samples in past. For our recent review we were able to visually show collaboration between Crick labs internally, with external partners ie the UK labs we collaborate with both in universities and commercial labs, and worldwide collaborations, by analysing affiliation data on paper. I am not doing this personally, we have a team of data wizards who created the maps and diagrams. But if institution does not have data analytics team, like we have, its very valuable to have something like an integration with VOS viewer. We have the data in our CRIS system linking all papers to labs and this is feed to our data world where additional data (such as affiliation data for all authors) is pulled in from Scopus. In maps you see clusters and how strong link is, this is all done inhouse!

Isabel: how could we map this out with collaboration or labs?

Lea: Broadly thinking and not only Scopus: collaboration and networking: we are wondering what else is happening, are you creating complex visuals yourself and do you need help? What questions are being asked?

William: we got asked to map of co-authors, we would love to have this as a visual.

Q: why interested?

Some people need it for internal justification for a team, or a person displays it on own webpage for others who'd like to look them up.

Patti: We are sold as national source for UK and funders and we have to prove value to academia and funders. This is why our data analytics team is creating this information.

d) SCOPUS data in CRIS

Lea: CRIS or not, REF, benchmark etc: Evaluation: where do you focus on? Which more data do you need?

Katherine: show researchers their world, explain policy papers: how your research gets into the world, also relates to preprint. Anything helps to demonstrate their work is being used which is not easy. Going into policy? GREAT!

Patti: Citations in patents is something I get asked for.

Katya: PlumX limited, but you can use it if you want to explore this.

Isabel: Regarding patent and policy citations: Is this the right level of aggregation to focus on institutions? Or per authors? Or doc level?

Kathrine: We used altimetric to find patent and policy citation information. Scopus is useful here and it came up in one of our REF case studies. Useful at uni level either author or paper level or department level (reg REF), we have surprised people who had no idea they received citation in patent.

Katherine: The expansion of Plum is really good, too. But that's just me! We're not as science/patent heavy as other people!

e) Societal Impact

Elizabeth: societal impact is increasingly important, also from public gathering perspective.

Patti: Even for those who don't do REF funders want to know what the societal impact their funded research has, it is a question annually in ResearchFish.

How do you know?

Patti: We seek patent citations, but we don't subscribe to any patent databases, so we keep digging around in free sources now.

Kathrine: SDG impacts are very important in universities. Matt showed us SDGS and within a second I got asked more about it internally. If we look up all policy papers we can link it to show to funders what things we are doing. Less traditional impacts are key to many in health research. Scopus helps you build a story with a single product without a need to have a range of sources, especially for smaller institutions who can't afford several databases.
Patti: Having data from a known curated source is better than relying on free sources.
Elizabeth: Why should Scopus do this? Increase the number of use cases will benefit financially for Scopus.

f) For Discussion at next meeting:

Lea had 2 questions which she would like to look at the next meeting. Going beyond citations, when demonstrating the quality of research which key words or topics you would like to see in measures which demonstrate the uniqueness or novelty of the research? How to judge quality of paper? Lea will also email these questions to the group members as not everyone was able to attend today.

ACTION: Lea

7. AOB

Patti commented that a lot of Crick authors now had 2 profiles as they had switched focus from their normal areas of science to work on COVID, which need to be merged. This was acknowledged by that the profile algorithm hadn't been able to accommodate these changes.

8. Date and place of next meeting

Date - Elizabeth will send poll of potential dates for Aug 2022 to committee members.

Venue - Online via Teams.

Elizabeth comment this was a change from what was agreed at previous meeting, but with the continuing uncertainty with COVID situation, both our next two meetings would be online, then the situation reassessed during 2023.

Actions for next meeting: extracted from minutes above and summarised for ease of reference at next meeting.

Action	Page ref*	Action	By whom
1	P1:11	To arrange alternative secretarial support for the next meeting	Elizabeth McHugh in conjunction with Elsevier reps
2	P2:13 action 7	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
3	P21:13 action 9	Report any long response times to support tickets to Lea Michaels (email l.michaels@elsevier.com)	Any Sherif member
4	P2:14b	Feedback on position of access full text toolbar and report any broken links.	Any Sherif member
5	P2:14c	To invite the Product Manager of the Privacy Centre to next meeting.	Michaela Kurchildgen or Lea Michaels?
6	P5:15a	To share examples of problematic precise searches with Katya(email: k.kulakova@elsevier.com)	Peter Bradley
7	P5:15a	To share examples of unhelpful error messages with Lea (email: lea.michaels@elsevier.com).	Any Sherif member

8	P5:I5b	To investigate whether the Scopus API can send corrections to CRIS systems and report back	Lea Michaels
9	P6:I6a	To share Systematic Reviews survey link with Sherif members of committee	Katya Kulakova
10	P4:I6b	To email Katya (email: k.kulakova@elsevier.com) with analytics and visualizations that would be useful, other than those discussed today.	Sherif committee members
11	P8:I6f	To share the questions for discussion next time with all the Sherif committee members	Lea Michaels

Page Ref constructed as

P - page of minutes

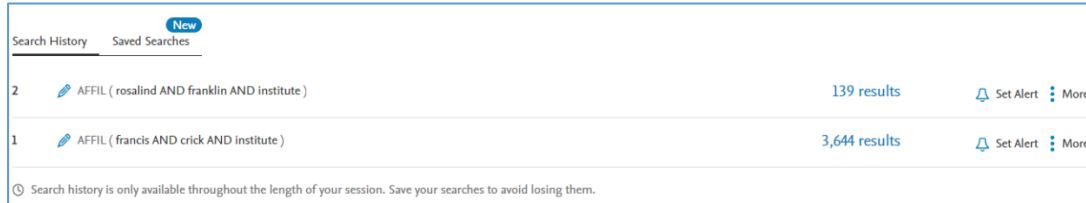
I - item number and subsection

Appendix A: Scopus Feedback from Institutions: May 2021 - October 2021

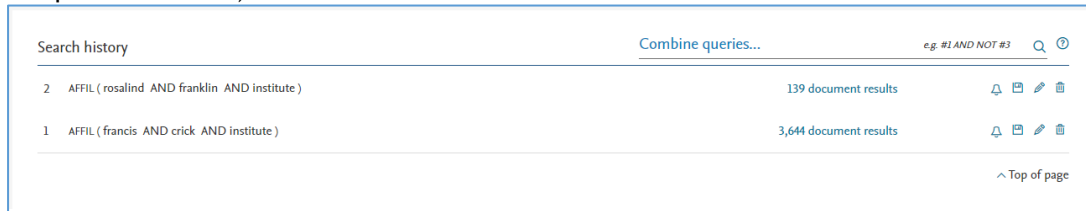
Francis Crick Institute.

1. Search history

It is nice to see on Basic search page, but it would be more useful if you could easily combine queries here



Going to Advanced search to combine queries is not an obvious choice for users (especially inexperienced ones)

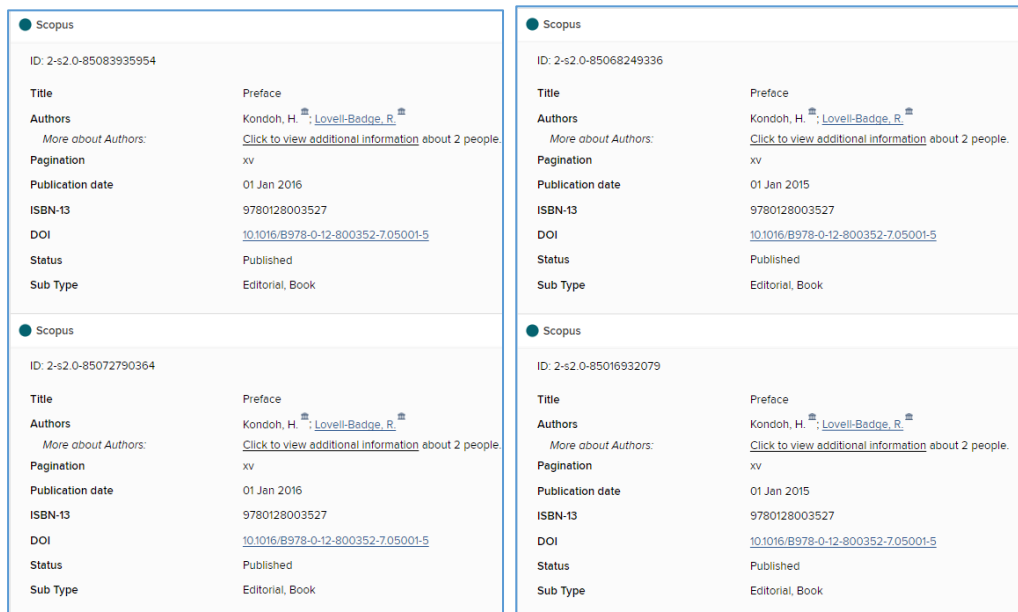


2. Multiple Scopus records and EIDs for some papers

While working on a publications list for an institute review we have found 66 examples for outputs with more than one SCOPUS EID. These are creating multiple Scopus records in our RIMS system and matching problems to other systems.

Example: <https://doi.org/10.1016/B978-0-12-800352-7.05001-5>

Has had 4 EIDs: 2-s2.0-85083935954, 2-s2.0-85072790364, 2-s2.0-85068249336, 2-s2.0-85016932079.



Now only EID 2-s2.0-85083935954 is in Scopus - the other 3 EID now report 'No Document Found'

Please can Scopus explain why this is occurring?

I opened a ticket with our RIMS supplier about how to clean-up these 'dead-end' records - the reply was that they would have to be manually split and delinked which will be quite a lot of work.

Does Scopus have any mechanism to inform CRIS/RIMS systems of deleted records or actually remove them for the systems?

University of Birmingham

I have a couple of metrics questions.

Firstly, regarding the author level metrics that are displayed on the Scopus author details page. At the moment, the metrics that are displayed are total documents, total citations and h index. It would be great if the average Field weighted citation impact (currently available in SciVal) could be displayed, this would encourage our researchers to engage with and report a more responsible author metric.

Secondly, it is very difficult for authors to interrogate the FWCI for their individual papers. At the moment, this is only available by going into individual article records, scrolling down, and clicking to 'view all metrics'. This makes finding your best performing paper into a game of battleships. It would be great if FWCI could be surfaced in the results list, and ideally made into something that a scopus user could use to sort a list of results - this would also be useful for those undertaking literature searching, and a more responsible way of sorting results by "impact" than by the current "Cited by" count.