

# Sherif Scopus Enhancement Group Committee Meeting

21<sup>st</sup> September 2020

Meeting on Teams - hosted by Elsevier

## Attendees:

### Sherif members:

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

### Supplier representatives:

Iana Tsandev - Head of Product Management, Platform Content, Scopus  
Kai Wan - Senior Product Manager, Scopus  
Michaela Kurschildgen - Customer Consultant, Customer Success Manager  
Charles Martinez - Key Account Manager Academic & Government Market UK  
Rupal Malde - Customer Consultant, Academic & Government Market UK South

### Apologies:

Ryan Cronin, University of Cambridge

## 1. Welcome and Introductions

Elizabeth welcomed everyone to the meeting. Everyone briefly introduced themselves, and where they were dialing in from, as it was Rupal's first meeting. Elizabeth shared apologies from Katherine who was having technical difficulties joining the meeting: she was join us about 30mins into the meeting.

## 2. Minutes of the last meeting - 4<sup>th</sup> March 2020

Minutes of the meeting 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 from Cranfield University - Elizabeth ask again
2	To raise at next Proquest Enhancement Group the raising of export limits from Scopus to Refworks	Elizabeth McHugh had raised this.
3	To alert Sherif members when tests of new platform are scheduled	Kai responded that no dates for user testing have been set. The platform rebuilding has taken at 6 months. The test environment is only available within Elsevier, so it has not been possible to use that for any customer testing.
4	Sherif members to feedback to Charles if a test will cause them problems eg clashes with training session, so their institution can be exclude from test	As response to action 3.
5	To check whether copyright statements in abstract are a contractual requirement	Iana Tsandev is still checking on this
6	Request URL for Scopus Roadmap	Had been done

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

Kai Wan then did a brief presentation on changes and what is coming in the future.

During 2020 Scopus has changed the methodology used to calculate the CiteScore for journals to produce a more reliable metric. The two slides below show the former and new calculations:



So the new calculation has a longer citation window of 4 years (including the most recent year), includes all typically peer-reviewed publication ie articles, reviews, full-length conference papers, chapters from book series and data papers. To reduce false precision the metric rounded up and display only one decimal place. The new methodology has been retrospectively applied back to 2011: the metric calculated by old methodology can be downloaded as report if needed as it is no longer visible in Scopus. Robyn agreed that the new calculation produces a better metric.

The other area where change is currently occurring is in **Author Profiles**, A/B testing of this went live last week with 80% seeing the new screen to 20% the old. If any institution wants to be excluded from the test, please let Charles Martinez know. The new design will be the only option by the end of March.

- Re-built from scratch
- Front-end and back-end migrated to a new framework using REACT to allow easier and more frequent updates in the future
- Page design and layout revamped based on direct users feedback → more comprehensive overview of Author Profile
- **NEW section:** "Most Contributed Topics" → To display top 3 topics the author has contributed most in recent years

Note: Users can still view full Topics list in the Topics tab

- Existing functionalities are still available

The new profile pages are the first evidence of the complete backend rebuild, which will allow corrections to be made much more rapidly. The new design has been user experience tested for clarity and usability. One key feature of the new design is the introduction of the section to right of the publications/citations graph which shows the top 3 topics that the author has contributed to, further topics can be seen by clicking on the Topics tab in section below. Robin asked if Scopus had any plans to include author position data as Web of Science does? She believes that Web of Science gets their data from Incites and Publons. Kai was not aware of any plans to do this.

Kai then moved on to talk about the **Roadmap 2020 and beyond**. Preprints and a significant change to the availability of open access articles and their labelling are planned for November 2020 release.

**Preprints** will be added to Scopus as they give a greater insight into an authors current work. The first tranche will be preprints from ArXiv , BioRxiv and ChemRxiv from 2017 onwards. It is hoped that MedRxiv can be added soon after launch and that SSRN will be added later too. Preprints will only appear on Author profile pages, they will be separate tab (so will be semi-autonomous from other publications) and not included in calculated metrics. Scopus has created own record for each preprint to ensure consistency and quality in the records, which will include a link to item in the repository. Katherine asked if it might be possible to get some examples from her own institution for training purposes.

Moving onto **Open Access**, Kai outlined that currently Scopus only labels papers as open access where the VOR is available freely available from the publisher. So the Open Access label appears on records for papers published in fully OA journals, paid for in hybrid journal or available through an open archive. The data for this labelling comes from Unpaywall, which also has information on 'Green OA' version ie those in repositories. In the next release Scopus will label papers with a Green OA version and add granularity to its open access labelling by using different labels. The labels proposed are detailed in the slide below:

Proposed 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"> <li>Article from Heliyon (Elsevier)</li> <li>Article from Global Health Action (T&amp;F)</li> </ul>
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"> <li>Article from Reliability Engineering &amp; System Safety (Elsevier)</li> <li>Article from Journal of Fluid Mechanics (Cambridge Univ. Press)</li> </ul>
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"> <li>Open Archive (Elsevier)</li> <li>Promotional access</li> <li>CHORUS</li> </ul>
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"> <li>Any article with a version available in a repository identified by <a href="#">Unpaywall</a></li> </ul>

The open access labels will be added to the Scopus API, so that information can be pushed into CRIS systems. The labels will be searchable in Advanced Search and appear as facets to limit searches result by too.

Kai also share the consolidated Roadroad map, which shows what has been achieved so far or is planned for release by end of 2020:

Consolidated Scopus roadmap for 2020

Theme	H1 '20	H2 '20
Improving evaluation capabilities on scopus.com	<ul style="list-style-type: none"> <li>Redesign document, author, institution and source (journal) pages</li> </ul>	<ul style="list-style-type: none"> <li>Redesign document, author, institution and source (journal) pages</li> <li>Introduce Scopus view counts metric</li> <li>Introduce DOI recent pre-prints on author pages (ArXiv, BioRxiv, ChemRxiv, SSRN)</li> <li>Adding additional Open Access filters and classifications on the article level</li> </ul>
Improving the Scopus API for better customer workflow integration	<ul style="list-style-type: none"> <li>Aligning Scopus API with Scopus.com and SciVal API</li> <li>Improved documentation/templates and training materials</li> </ul>	<ul style="list-style-type: none"> <li>Inbound data APIs (author and institution definition feedback)</li> <li>Matching functionality in API (e.g. find researcher IDs based on DOI)</li> </ul>
Improving integration across our product portfolio	<ul style="list-style-type: none"> <li>Full alignment of metrics between Scopus and SciVal</li> </ul>	<ul style="list-style-type: none"> <li>Full alignment on institution definitions across the Scopus and SciVal (~12,000 institutions)</li> <li>More Topics of Prominence integration for topic tracking</li> </ul>
Expanding our content	Continuous content expansion activities (journals, conference abstracts, books)	
Improving our profiles	Continuous author profile and institution profile improvements	

\* More information regarding coverage of funding bodies will be communicated soon.

There is further detail on the roadmap in a blog posting from 16<sup>th</sup> September 2020:  
<https://blog.scopus.com/posts/scopus-roadmap-whats-coming-up-in-2020-2021>.

There is no shareable information on what is coming in 2021 yet , but planning meetings are taking place at Elsevier. Kai hopes to have information to share prior to our meeting in early 2021.

Kai concluded with a sneak peak at a couple of the proposed new layout designs for search results and item detail views. Scopus is creating a beta site with customer access, so if any institution wants to participate in testing they should contact Kai.

Robin sought a clarification on Bronze OA promotional access, Kai responded that as data was coming from Unpaywall if promotional access ceases the open access label in Scopus will also update. Robin also had a query on the definition of Bronze open access, Kai undertook to put her in contact with Seb, so she could get more information this.

## 5. Queries and Comments from Sherif members

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

### Crick

1. Rupal commented that she had been deal with a similar case of mis-merged profiles for Bournemouth University. **Adrea Lokteb** is able to look at profiles and see whether a lock has been applied due to customer feedback or whether an algorithmic change is affecting a profile. Iana also asked that Patti send her examples.

**Commented [PB1]:** Have asked Rupal to confirm this name as I'm not sure I caught it correctly

### Imperial

1. Scopus were glad to hear that off-site access had been seamless
2. Scopus will aim provide responsible metrics. They recognise that H-index can be problematic for UK customers, however other customers worldwide do use it so removing it isn't possible. They will communicate any changes made to metrics.
3. Was raised as an action at previous meeting. Iana had had a response from her legal colleagues - having the copyright statement as part of the abstract is a legal requirement in the contracts which Scopus agreed with the data providers. If it could be separated out into its own field this might provide a solution. Kai added that these false positive due to copyright statements being part of the abstract field was a short coming of the search engine. There is a side project looking knowledge graphs and elastic search. If knowledge graphs solves this issue it would be another reason to move away from Boolean and fixed fields for searching.

### University of Birmingham

1. Kai responded that there is no other way to extract a search strategy other copying and pasting it from search history. Scopus has had other feedback about this, so is looking at this area and workflow. Kai will try to have an update for the next meeting. Other Sherif members added that sharing search strategies is a big issue for them as systematic reviews, which used only to occur in medicine, are becoming more widely used in other fields. Kai will raise this with the UX team is a higher priority matter.

## 6. AOB

We did a quick round table to pick up any additional business or comments.

- William - echoed Imperial positive comments on off-site access. He raised an issue with inconsistency of inclusion of early view papers which confuses researchers. Iana responded that this dependant on the data supplied by the publisher. Iana will follow up if William has specific concerns.
- Katherine - commented that she could provide contacts for colleagues who do systematic reviews if this would be useful to progressing getting exportable search strategies.
- Patti - asked that if Kai could share the slides, so that they can shared either selectively in the minutes or alongside them. Kai agreed.

- Everyone agreed that holding the meeting online had been very successful. The business had been concluded in under 2 hours.

## 7. Date and place of next meeting

Date - probably 1<sup>st</sup> or 2<sup>nd</sup> week of March 2021

Venue - Online via Teams

### Actions for next meeting:

Action	Page ref*	Action	By whom
1	P2:I3 action 1	Provide a use case for clickable keyword- from Aug 2019 meeting	Elizabeth McHugh to raise again with Cranfield University
2	P2:I4	Any institutions wishing to opt out of A/B testing should contact Charles Martinez	Any Sherif members using Scopus
3	P4:I4 Roadmap	To share information on 2021 roadmap when it is available	Kai Wan
4	P4:I4 Questions	To put Robin Price in contact with Seb who can answer her questions on the definition of Bronze OA	Kai Wan
5	P4:I4 Questions 3	To contact Kai Wan if your institution wishes to participate in beta testing the new Scopus platform	Any Sherif members using Scopus
6	P4:I5 Crick	Send examples of mis-merged profiles to lana for investigation	Patti Biggs
7	P4:I5 Imperial 2	To communicate any changes for metrics, especially those relating to Leiden Manifesto	Scopus team
8	P4:I5 Birmingham	Raise need for exportable search strategies with UX team and report back on any progress with this to next meeting	Kai Wan
9	P4:I6	To raise with lana any specific concerns over early view papers not appearing in Scopus	William Farrell + any other users
10	P4:I6	Send slide deck to Secretary for minutes	Kai Wan

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 : April - September 2020

### Crick Institute

The Crick has had to do quite a number of author profile corrections as part of their implementation of a CRIS system. Mostly they have gone through quickly and smoothly, however the Crick is concerned that Scopus' algorithm is incorrectly merging profiles.

Patti Biggs is currently working on fixing an example of this: there were two separate profiles for a psychologist at Boston University and a biologist (formerly at Boston University, but now at Crick/Kings) with similar names. In the last two weeks (*of July*) they have been merged into one profile - using scopus ID of the psychologist.

Patti can appreciate that the fact that they were both at Boston University simultaneous may be the cause of this merger, but feels is a pity that records which were correct when she originally checked and associated the appropriate Scopus profile with our Dr K B are now wrong. The Crick was alerted to this by a large number of incorrect papers suddenly appearing in their CRIS.

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### Imperial University

Off site access during 2020 has worked well, no reported issues from staff/students off campus that couldn't be solved.

Will there be any changes in Scopus following Elsevier's endorsement of the Leiden Manifesto?

Difficulty with searching due to inclusion of licence in abstract still frustrating - WoS and Dimensions do not suffer from this. Robyn Price followed up with Scopus team in June/July but hasn't received a response.

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### University of Birmingham

Is there a way to extract a search strategy from Scopus that is better than copying and pasting it from the search history table? This would be helpful for those reporting on searching as part of systematic review, also from a reproducibility perspective.

As an example, the Ovid platform offer a good route to this".