

# ERIC Improvements to Enhance Your Research

## January 18, 2017

### Speaker Notes and Q&A

#### Presentation

##### Slide 1

All right, everyone. We are going to begin. I am Erin Pollard. I am the Project Officer for ERIC in the U.S. Department of Education, and I would like to welcome you to our webinar. Today we are going to take you on a guided tour of recent improvements that we've made to ERIC. We believe the changes that you see will enhance your research experience. Whether you are a researcher, professor, graduate or undergraduate student, academic librarian or other education stakeholder, we think these will be valuable to you.

Before we get started, just a couple housekeeping items. First, we muted everyone to reduce the noise during our presentation. So if you have a question, please enter it in the chat box on the side of your screen. We will work the answer into our presentation or address it at the end in our Q&A session. Also, we are recording this webinar, and it will be available for viewing on the ERIC YouTube channel in a few weeks. You will be getting an email to let you know when it's online.

We are also closed captioning the presentation. If you want to turn off the captioning, please click the X by the Media Viewer.

##### Slide 2

So today, three of us will be speaking to you. I am going to begin shortly by giving you an overview of enhancements we've made to the ERIC record. Then Sheeba Rooney from the AEM contract is going to walk you through to show you the new features, how they work, and how to use them in your work.

Following the online tour, Nancy Cawley will let you know about some new communication products we are really excited about, including recently released videos and more products and events in the works. Then we will answer any questions that you may have.

##### Slide 3

We are happy to announce new ERIC improvements in four key areas. First, all of the records for IES publications and studies included in the What Works Clearinghouse now include links to the IES webpages. Here, you will find additional publication and funding information, study review guide information from the What Works Clearinghouse, and other IES resources. We are very excited about connecting ERIC users with the wealth of information on the IES website.

Second, we've begun to include author-provided links to digital identifiers on third-party websites. You can find lists of other author publications and other information about the author directly from ERIC.

Third, we've streamlined and standardized ERIC identifiers to help you focus your searches based on locations, assessments and surveys, and laws.

And last, but not least, we've implemented our latest update to the Selection Policy related to including the peer-review flag on qualified grey literature records. Peer-reviewed reports and conference papers are now appearing in ERIC searches.

Now I'm going to turn it over to Sheeba to walk you through most of these changes on the website, starting with the identifiers.

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I am going to start by giving you some background about ERIC identifiers. Then we will go online so you can see what they look like in ERIC records today, and find out how to use them in a search. Identifiers have long been part of ERIC, but they weren't standardized like the ERIC descriptors. Over time, the identifiers became a hodgepodge of terms with different abbreviations, spellings, formatting, which made it very challenging for users to find what they were looking for.

For example, the test "Minnesota Multiphasic Personality Inventory" had 15 different variants for identifiers, and you had to search literally on each term to find all records relevant to the MMPI in ERIC.

Our solution was to create three separate searchable fields which are useful to researchers. One, location; two, laws, policies, and programs; and three, assessments and surveys. And we standardized the terms in each category to make the identifiers a controlled vocabulary. This eliminated redundancy, reduced the number of identifier terms from more than 7,800 to a much more manageable 1,200, and increased the power of these terms for use as search filters. Using identifiers, searchers are now able to find materials related to specific locations, laws, or assessments, no matter how the author referred to them in the article.

Language changes over time, and authors may use abbreviations or only partial terms in their work. But you can still find these relevant materials because they are tagged with the standardized terms.

These changes allow for more precise filtering of your search results and add consistency to the identifiers as a controlled vocabulary. So let's see how they work on the ERIC website.

It is incredibly useful to be able to harness the identifier limiters to more precisely narrow your searches. I will show you some examples using the identifier limiter.

Let's say we are doing some research on reading improvement in Texas related to the No Child Left Behind Act. For this demonstration, I am going to use the search phrase "reading improvement."

First let me take a moment to show you the three new limiter boxes on the left side of the search results screen. These are the identifier categories for location; laws, policies, and programs; and assessments and surveys. Clicking these links inside the boxes will return records that include that selected identifier. Looking at location, you can see the list of location identifiers that exist in the results for the search on reading improvement, along with a number of records that include each of these identifiers. For example, 284 records in this result set are tagged with the location set California. Since we're looking specifically for the research related to Texas, we can click Texas and see the results. If we click a title, we can see the full record with the location identifier Texas.

Now, since there's an identifier for the No Child Left Behind Act under laws, policies, and programs, we can add this limiter to our search to get our result. Click this first record. You can see the record shows both of the identifiers: Location, Texas; Laws, Policies, and Programs, No Child Left Behind Act 2001.

Just so you know, you can only select one identifier at a time. Each selection works to refine the previous results.

Now let's try another search. We'll use something from the third category of identifiers, assessments and surveys. Say we want to find full-text, peer-reviewed records in ERIC related to the SAT. One way to do this is to simply enter the assessment name or a fragment of the name in the search box and click the boxes for peer-reviewed and full text.

Most of these records will be tagged with the identifier for the SAT, but not all. It is not listed on this one, but we can see it in this one.

Not all of the records are necessarily about this assessment, and that's why it was not listed in that first one. But in order to retrieve only those records that are relevant to the SAT, we'll again scroll down to the limiters on the left, and you can see it right here, assessments and surveys. We are going to click "SAT."

So you'll see only full-text, peer-reviewed records with the SAT identifier, and we can see the reduction in results.

You can see what a powerful search tool this is and how standardizing the terms has helped to make this a much more usable search aid.

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The next big improvement involved integrating ERIC with the newly redesigned IES website by adding hyperlinks to useful resources, including:

- Links to greater detail about publications developed by the Regional Educational Labs, What Works Clearinghouse, and IES Centers, including the National Center for Education Research, National Center for Special Education Research, and National Center for Education Statistics.
- Links to funding information for all IES-funded work, and
- Links to the online study pages for studies reviewed by the What Works Clearinghouse. Currently there are more than a thousand studies in ERIC that have available study pages, and more will be added on an ongoing basis.

As Erin mentioned, ERIC is also adding links to author pages on third-party websites, but first let's look at the new links in ERIC to the IES and What Works Clearinghouse webpages. First let's look at a few examples of the IES publications.

As you can see, as I just discussed, this record has a location and assessment and survey identifier, but that's not what we are going to talk about. You can also see this new IES publication URL field. When we click this link, it redirects us to the NCES page. The report on ERIC was related to the state of Michigan, but when you look at this page, you can see a map that has a drop-down of all the states that were involved in this study. We can find Michigan, but you could also find the matching PDF for any of the other states. So let's look at another IES publication.

Again, we are going to click this link, and this time we are going to go to the NCER page. You get a lot of additional detail that does not exist in the ERIC abstract, and while the ERIC full text takes you to the full report, this page provides the executive summary as well as a report broken down into the body and appendices. This may be more useful to you than the entire 650-page document.

Next I will show you two examples that redirect us to the IES funding page. As you can see on this record, unlike the IES publications, the URL related to IES funding is not displayed on the ERIC record, but when a record has a link to IES funding information, the IES grant or contract number field will display an embedded clickable link. So we are going to click the grant or contract number link. And it takes us to the IES funding opportunities page. This page shows a lot of great information about the IES grant. When you scroll down, you will see a section that's called Publications from this project. We can see the article that we came to from ERIC, *Changing Models Across Cultures*, and also see that this title is underlined, and it is also clickable. When we do click the link, it takes us back to ERIC. I think that integration is just so cool that they work together like that.

I am going to show you another example. Now, I love this next example. It has all three identifier categories that we talked about. It has an IES grant link, and it also has the What Works Clearinghouse study page that I am going to show you next. But for this example, we are going to click the grant link. And again, we find some great information on the IES funding opportunities page for this grant, including a reference to a related IES project. So when we scroll to the publications, we can see the report that we linked to from ERIC, *Impact of a Social Emotional and Character Development Program*. Again, it's underlined, I am going to click, and it's going to take us back to ERIC.

So, since we are already on this record, I will now show you the What Works Clearinghouse study page link. As you can see, the URL is included on these, just like with the IES publication links. So when you click the link, you will get redirected to the new What Works Clearinghouse website. You can see the details of the review. You can see the entry right here. You can also see the rating, the review date, and a lot more information here. You can go and click on the What Works Clearinghouse website.

I am going to give you one more example. It has a bunch of the new fields that we talked about. For this example, we'll specifically go to the What Works Clearinghouse study page. And this What Works Clearinghouse study page has a lot of detail. You can pull down the different reviews that are available. You'll see the review date. You'll see the review standard. You can click some of these additional details if you are looking for additional information.

We are really excited about these new links to the resources on the IES webpages. They reduce the need to launch individual searches on multiple sites, and they enrich the amount of data available to researchers in a very user-friendly way. We think they will be a big benefit to ERIC users.

Now on to a second set of links we've added to ERIC, links to author webpages. IES has encouraged grantees and contractors to list their work on the biosketch site ScienCV. This is similar to the site ORCID, which you may be more familiar with. The authors include these links in their funded works submitted to IES, and the ERIC team watches for them in the content acquired for processing. Right now, we only have this information for one researcher, Yaccov Petscher, who was kind of enough to be our guinea pig, but going forward, we will be adding this information for any author that provides this through the online submission system or in the metadata we get from publishers.

At this point, only about 90 records in ERIC have these links. We expect the number of author links to grow over the years, as authors begin including this information in their metadata and as the practice becomes more widely adopted in the field.

In ERIC, the author ID link is embedded in the author name. So let's say we found this record on Florida's extended school day policy. Yacov Petscher is the second author, so if we click on this hyperlink, we leave the ERIC website. By clicking through the disclaimer, we go to his external ORCID website. We can now see all of the work that he has written. You can scroll down and see the article that we came from in ERIC, *School Reading Performance and the Extended School Day Policy in Florida*. This is advantageous to find all of the work by one author.

If you go back to ERIC, you can see we can do an author search, and Petscher's name pops up with all the reports he has written in ERIC. This only works because he has a unique name. This doesn't work well if you use the name "John Young."

Here you see that there are 20 John Young articles. However, this John W. Young may also have written as plain John Young, or JW Young, and our search couldn't distinguish between the two. Instead of trying to re-create a brand-new system, we are linking to outside sites so that users can get this information.

Now I am going to turn the presentation back over to Erin to talk about our efforts to add the peer-review flag to qualified grey literature.

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Thanks, Sheeba. We covered this topic in previous webinars, so I am not going to discuss it at great length now, but I do want to give a brief update on our progress in adding the peer-review flag to qualified grey literature in ERIC. We are now adding the flag on newly indexed grey literature, including reports and conference papers, that we know for a fact are peer reviewed. We don't have information about the peer-review status of all our incoming grey literature, but we're taking steps to publicize the flag and have providers apply to have it included on their qualified content. We have also added an application form on the FAQ area of the ERIC website that can be used by providers to apply for peer-review status. We are also adding an area in the online submission system for authors to provide us with their peer-review information.

So if you look at the FAQs, here's where publishers can find the application form. We are going to head there now, and you can just see it right here.

Authors using online submission will soon be able to provide information about the peer-review status of their materials in the online submission system. There's information about this in the online submission FAQs, and we expect the update to go live later this month or early next month.

Just to reiterate from previous presentations, which can be found in the multimedia section, the reason we made the decision to apply the peer-review flag to grey literature was to reduce confusion of only having some types of materials but not others marked as peer reviewed. Two, to apply the flag in a fair and equitable way to all of our content providers. And three, to make these materials visible for searchers who are looking for peer reviewed material.

If you would like to know more about our rationale, check out our new video called "How Does ERIC Assign the Peer-Review Flag?" This video walks you through our requirements and processes for assigning the flag to ERIC records. We also designed this FAQ video to be used in a LibGuide or to show in a class, and we would love to hear your feedback if this kind of communication tool is useful.

Now I am going to turn the presentation over to Nancy to tell you about our new videos, as well as other communication products designed to help you and other searchers get the most out of using ERIC.

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Thanks Erin. Now we are going to switch gears and talk about our new communications products. Lately we have made a huge push to increase our communications activities to a wide variety of users. We are releasing more videos, holding more webinars, and creating more infographics than we ever have before. Many of the new products we are rolling out are intended to inform users about the recent changes you have seen demoed in the webinar. Others respond to the most frequently asked questions we see coming into our Help Desk.

So first I would like to preview our new videos. We have released five videos over the past several months, so let's go to our YouTube channel now so you can see them.

From newest to oldest, we have first, the video called *Tips and Best Practices for Writing an ERIC Abstract*, which was just released in late December. This is a primer on how to write an effective abstract, so ERIC searchers can understand in a glance what your work is all about.

And last month we also released *How Does ERIC Assign the Peer-Review Flag?* This is the video Erin was just describing. It's very helpful if you want to understand how ERIC treats peer-reviewed materials in the collection.

The video *About ERIC* is a basic introduction to ERIC. It describes what ERIC is, who uses it, and what you'll find in the ERIC collection.

*How ERIC Can Help You Write a Research Paper* is primarily a resource for students, although anyone writing a paper could find it useful. It provides a practical approach to using ERIC, and it offers guidance on how to write a research paper from start to finish.

*How ERIC Selects New Sources* is mainly for the publishers and organizations who contact us about getting their journals and other materials indexed in ERIC. It's also a great resource for understanding our selection policy.

Scrolling down the list, you can see all of our videos and recorded webinars here, and speaking of webinars, I just want to let you know that we're planning to hold two more between now and August to help keep you up-to-date with ERIC. One will be held later this winter, and another in late spring/early summer. We really hope you'll be able to join us for these webinars.

As far as our plans for future videos, we are going to continue to build on our video library. Our new videos will address the varying needs of our audiences, but especially the needs of our novice users. Several of these videos will explain how to perform specific ERIC-related tasks, like the writing an abstract video. We are also developing some short FAQ videos to respond to our most frequently asked questions. Also, there will be more videos on our new features, including the following, which you should see coming up in the coming months: *How Do You Use the What Works Clearinghouse Links in ERIC Records?* which Sheeba just covered, *Using ERIC Identifiers* and *Using Links to Information on the IES Website*, and even more coming out this spring.

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Now let's talk about infographics. We've also increased the number of infographics that we're creating this year. Infographics depict ERIC processes and procedures, or they show metrics such as this infographic showing *Who Contributes Content to ERIC*. You can find this in our FAQ area of the website.

We also just released a *Year in Review* infographic that highlights all the new features we just discussed today. It also provides an update on new content, providers, and ERIC usage in 2016. You can see this infographic by going to the Notes area of the ERIC website.

We have another infographic in the works, and this one relates to the new ERIC identifiers. This will be a companion piece to the video that I just talked about that's coming out this winter on how to use identifiers as search limiters.

You can see we've made a lot of improvements in ERIC, from links to additional information on critical studies, to search tools, to more accurate and equitable identification of peer-reviewed materials in ERIC, as well as other improvements. We are also increasing the number of support materials to help you understand and use ERIC better, and to provide resources that are useful for teaching ERIC to others.

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So how can you stay informed about all these new things that ERIC is doing? In addition to following us on Facebook and Twitter, you could also sign up for the ERIC newsflash. You'll see all of our announcements that way, including information about new features, videos, infographics, as well as sign-up information for our upcoming webinars.

Here's the URL for the newsflash on the screen. And this is what the sign-up page looks like. The checkbox for ERIC is under NCEE.

That's all of the presentations that we have today. I'm going to go ahead and turn it back over to Erin for our question-and-answer session.

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Thanks so much, Nancy. And this is a plug for signing up for the newsflash. If you sign up for it today, we will email you that Year in Review infographic tomorrow morning.

So what I would like to do now is to take time to answer any questions or comments that you have. Please use the chat box to send this to Ed Host, and we will answer questions. We are going to first answer questions specifically about these new fields, then I will open up if we have time to answer any broader questions about ERIC.

Questions and Answers

Following are the questions asked during the webinar and responses from the ERIC Team.

*Question 1 - These look like really helpful changes. Thank you. When are we likely to see these incorporated into the vendor interfaces? Will they be applied retroactively?*

The unhelpful answer is that we are the government. We can't tell ProQuest what to do. However, we have made all the files available, they got them on Friday, and we sent out an email to the vendors who

have been in contact with us as soon as these fields went out. So they are aware that they are available, and they have had all of three days, including a long weekend, to work on it, and I would expect that they would see it soon. But if you have specific questions, you should be contacting them.

Anyone, not just vendors, can access all of our data. We make this available to all users in our Download area. But the fields have applied retroactively. I believe we updated close to 900,000 of our 1.6 million records.

*Question 2 - Please show the URL again.*

We would be happy to show it to you. We think you mean the Newsflash URL because that's what we have, but if that's not what you are looking for, just let us know.

*Question 3 - How does the controlled vocabulary for the identifiers differ from the descriptors?*

And so the answer for this is that they differ from the descriptors in that they have no scope notes, no relationships to other terms, and they are not concepts [they are proper nouns]. They are controlled in the sense that we have standardized names that you can filter on. And we are being consistent in how we apply the name as opposed to making this a formal vocabulary. So these are designed to be less formal than the thesaurus.

*Question 4 - Are the lists of the valid laws and tests and other identifiers available on the ERIC site?*

The answer is no, because we designed them to be filterable instead of searchable. But if we feel there's a good reason why, and how that could be used, we could certainly reconsider it. We have all the information. We haven't posted it because we didn't think it would be particularly useful.

*Question 5 - Can authors have their information updated on ERIC records when they obtain an ORCID ID or ScienCV?*

The answer is yes, but we would ask you to make our lives easier and that this won't be done instantaneously. It won't be done that day, or week, or even month. We will do it when we have time. We ask you to send us a list of all the ED or other numbers you would like to be updated as well as links to the ORCID ID or ScienCV page you would like it to be linked to. We don't do personal pages, only biosketch pages.

*Question 6 - Will the recording be sent out or do we just go to the site?*

The recording will be posted on YouTube and then we will send a message out to you in an email, probably within a day of it going live. And, we will be posting the slides and everything as well on the website.

*Question 7 - Would you be able to forward this email to peers?*

Absolutely. The link that we are going to send out for the archived video will just be a link to the YouTube video. So you will easily be able to forward it. It's not a unique link.

If you have any other questions after this webinar, please feel free to contact us via email through the Contact Us link at the bottom of our web pages, and we would be happy to answer any questions. Thank you so much for joining us today. We really appreciated getting to talk to you.