A Spring of Collaboration: A NISO Update of Strategy, Trends, & Industry Collaboration on Discovery and Interchange and More

Charleston Conference, November 2018
Christine Stohn
Julie Zhu
Jason Price
Gaëlle Béquet
Agenda

- Introduction (Christine Stohn)
  - NISO as platform for collaboration
  - Information Discovery and Interchange – Strategic considerations
- ODI – the Open Discovery Initiative (Julie Zhu)
- KBART Automation (Jason Price)
- NISO TRANSFER (Gaëlle Béquet)
A short introduction to NISO‘s structure

NISO Board of Directors

Architecture Committee

Information Creation and Curation (ICC)

Information Discovery and Interchange (IDI)

Information Policy & Analysis (IPA)

Topic Committees

Working Groups/Standing committees

How the information world CONNECTS
A short introduction to NISO's structure

- NISO Board of Directors
  - Architecture Committee
    - Information Creation and Curation (ICC)
    - Information Discovery and Interchange (IDI)
    - Information Policy & Analysis (IPA)
      - ODI
      - KBART
      - KBART Automation
      - TRANSFER
Information Discovery and Interchange (IDI)

Focus

- Issues regarding the finding and exchange of data to optimize discovery and use of information and material incl.
  - Discovery systems
  - Transfer of data
  - User experience
  - Web services
Information Discovery and Interchange (IDI)

Roster

Kristin Antelman
University of California, Santa Barbara

Scott Bernier
EBSCO

Robert Boissy
Springer Nature

Peter Murray (Chair)
Index Data

John Dove
Unaffiliated

Bob Schulz
OCLC

Christine Stohn (Chair)
Ex Libris

Greg Suprock
Apex CoVantage

Julie Zhu
IEEE
Information Discovery and Interchange (IDI)

Strategic considerations

- Discovery of open access and free resources
- Transparency in discovery
- Discovery of non-traditional content-forms
- Data quality, publishing and exchange
- Systems interoperability, authentication and APIs
- Enhancing the user experience

https://www.niso.org/publications/niso-strategic-directions-2018
Information Discovery and Interchange (IDI)

Discovery of open access and free resources

- Metadata quality and sharing, especially in and from institutional repositories
- Expectation of users for one-stop access to content
- Consistent use of open access indicators on item level in the metadata
- Consistent definitions of and indicators for differing versions
- The discovery, vetting, and access of/to open educational resources
Information Discovery and Interchange (IDI)

Discovery of non-traditional content-forms

- Discovery and interoperability of research data
- Finding and using teaching and learning material
- Discovery and use of digital and audiovisual material
Information Discovery and Interchange (IDI)

Enhancing the user experience

- The use of linked data and the full realization of the semantic web
- Creating context around material
- Personalization
- The use of visualization of data and material connections in discovery
- Discovery and use of annotations on information resources
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- ODI – the Open Discovery Initiative (Julie Zhu)
- KBART Automation (Jason Price)
- NISO TRANSFER (Gaëlle Béquet)
ODI (Open Discovery Initiative) Updates

- Background and goals of ODI
- Resources for libraries, content and discovery service providers
- Implementation guide for content providers
- Ongoing collaborations: revising recommended practice
Goals of Open Discovery Initiative

- **Streamline the process** of data delivery and indexing
- **Show transparency** of participation from CPs & DSPs
- **Define models for** “fair” linking
- **Determine usage statistics** collected for libraries and CPs
ODI Standing Committee (2014-Today)

- **Promote** adoption of RP
- **Support** content providers and discovery providers during adoption
- Provide a **forum** for ongoing discussions
- Determine **next steps** for ongoing work
General Resources

- NISO ODI
  https://www.niso.org/standards-committees/odi
- ODI Recommended Practice
- Future of Library Resource Discovery
- ODI Brochure
- ODI Updates Newsletter
- ODI Mailing List
  http://www.niso.org/lists/opendiscovery/
- ODI Standing Committee Email odi@niso.org
- ODI Twitter https://twitter.com/NISO_ODI
For Content Providers & Discovery Service Providers

- Content Provider FAQ
- CP & DSP Conformance Checklist Templates
- Completed Conformance Statements
  - CPs: APA, Credo, Emerald, Gale, IEEE, Oxford UP, Sage, Springer Nature
  - DSPs: EBSCO, Ex Libris, Proquest
- Content Discovery Management Google Group
Implementation Guide for Content Providers

- Conduct an initial assessment
- Form a discovery service working group
- Improve internal workflows, data quality and content delivery
- Collaborate with library service vendors
- Work with libraries
- Follow ODI activities and guides
For Libraries

● Information for libraries to increase ODI conformance among vendors
● ODI Conformance Statements
● Configuration guides provided by publishers
  ○ Elsevier, Gale, IEEE, JSTOR, Sage, Springer Nature
● ODI library survey summary
Ongoing ODI Collaborative Initiatives

- Library Responsibilities in ODI
- Collection-level content coverage disclosure
- Identify sources of records
- Handle Open Access Content
- More Meaningful Usage Statistics
- Fair Linking
- Address needs of A&I service providers
- Additional metadata and content elements
KBART Automation Update (Jason Price, SCELC)

- What does it do?
- Who is working on it?
- How does it work?
- Collaboration as the heart of the project
What Does KBART automation do?

KBART automation employs specificity to increase accuracy.

Instead of manual exchange of multiple, generic, one-size-fits-few metadatasets that require customization after the fact, it delivers a single, customer-specific list of accessible content per customer per content provider.
KBART Automation Working Group

Content providers
- *Noah Levin, Springer
- Jozef Paulik, Elsevier
- Peter Vlahakis, JSTOR
- Abigail Wickes, OUP
- Dongqing Xie, JSTOR
- Julie Zhu, IEEE

Libraries
- Lisa Gonzalez, PALNI Consortium
- Derrik Hiatt, TAMU-Corpus Christi
- Jason Price, SCELC Consortium
- Charlie Remy, UT Chattanooga

Knowledge Bases
- Stephanie Doellinger, OCLC (Co-Chair)
- Oliver Pesch, EBSCO (Co-Chair)
- *Benjamin Johnson, PQ Workflow Solutions
- *Christine Stohn, PQ Ex Libris, Inc.

* Also serve on Main KBART Committee
KBART in the context of the information landscape

Users → Discovery – Databases - Websites → Article (and other) metadata and full text → Content providers → Title lists (global) → KnowledgeBase → Direct links → LinkResolver → ERM → Availability → Title lists (local) - Holdings → Institution/Library → Title lists (local) - Holdings → OpenURL → Fulltext
KBART in the context of the information landscape

Users

Discovery – Databases - Websites

Direct links

OpenURL

Availability

LinkResolver

ERM

KnowledgeBase

Fulltext

Article (and other) metadata and full text

Title lists (global)

Content providers

Title lists (local) - Holdings

Institution/Library

Title lists (local) - Holdings

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Title lists (local) - Holdings
KBART Automation – Simplified Workflow

1. Institutional Token

2. Institutional Token

3. Request

4. File

5. Upload

6. Update KB content

One time activity
Scheduled activity
KBART Automation – Possible (simplified) flow

1. Institutional Token

Institution/Library

2. Institutional Token

3. Request

4. File

5. Upload

6. Update KB content

Content provider

API

Frontend

Scheduler

Import

KnowledgeBase

One time activity

Scheduled activity
“Springer Nature is now live with SpringerLink KBART Automated Holdings Feeds for SFX! OCLC and ALMA will be coming soon!”
Collaborative Strategy
KBART Automation Recommended Practice Draft

- Recommended Practice for Enhancing KBART for Automated Exchange of Title Lists and Library Holdings
- **Public Comment Period November 2-December 3, 2018**
- A DRAFT version of the KBART Automation Recommended Practice is available for public comment/input from November 2 through December 3, 2018. You can also read the press release announcing the draft.
NISO Transfer Standing Committee and the Transition of the Enhanced Transfer Alerting Service

- What is the Transfer Code of Practice?
- What is NISO’s role?
- Who is involved in NISO Transfer Standing Committee?
- How does this group support the Knowledge and Information communities?
- Why did the ISSN International Centre get involved with the NISO Transfer Standing Committee?
Enhanced Transfer Alerting Service (ETAS): Transitioning from Manchester to Paris

- What is ETAS?
- What did ETAS look like before 2018?
Welcome to the Enhanced Transfer Alerting Service

The UKSG Transfer Code of Practice (http://www.uksg.org/transfer) is a set of voluntary best practices for scholarly publishers to ensure that when journals transfer between parties the process occurs with minimum disruption and that the content remains accessible. The Code was developed under the auspices of UKSG by a Working Group composed of librarians, publishers and subscription agents. The UKSG Transfer Code calls for Endorsing Publishers (http://www.uksg.org/transfer/transfer_publishers) to provide alerts about journal transfers.

To help publishers and to make it easy for librarians and readers to be notified of journal transfers and search previous alerts, UKSG has collaborated with JUSP, JISC and Cranfield University to create this Enhanced Transfer Alerting Service.

For complete information about the UKSG Transfer Code of Practice please visit the UKSG website (http://www.uksg.org/transfer).

ETAS Latest Transfer Notifications

The ETAS RSS 2.0 Feed

Eos Transactions
Print ISSN: 0096-3941
Online ISSN: 2324-0250
Effective transfer date: 2013-01-01
To: Wiley Blackwell
From: American Geophysical Union
Wed, 14 Nov 2012 14:51:30 +0000

Eos Transactions
Print ISSN: 0096-3941
Online ISSN: 2324-0250
Effective transfer date: 2013-01-01
To: Wiley Blackwell
From: American Geophysical Union
Wed, 14 Nov 2012 14:50:31 +0000

North American Actuarial Journal
Print ISSN: 1922-0277
Effective transfer date: 2013-01-01
To: Taylor & Francis
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ETAS Latest Transfer Notifications

ETAS RSS 2.0 Feed

OTJR: Occupation, Participation, and Health
Print ISSN: 1539-4482
Online ISSN: 1938-2383
Effective transfer date: 2015-01-04
To: SAGE
From: SLACK
Mon, 24 Nov 2014 10:37:32 -0000

Canadian Art Therapy Association Journal
Print ISSN: 0832-2473
Effective transfer date: 2015-01-01
To: Taylor & Francis
From: Canadian Art Therapy Association
Thu, 05 Feb 2015 10:00:10 +0000

Multicultural Education Review
Print ISSN: 2095-615X
Online ISSN: 2377-0031
ETAS in Paris: Splitting ETAS into two Services

- What does ETAS look like at the ISSN International Centre?
  - The Report Interface (input) at portal.issn.org
  - The Alerting Interface (output) at journaltransfer.issn.org
Key title: ISDS-SEA Bulletin

Resource information

Country: Thailand
Medium: Print

Record information

Last modification date: 09/06/2004
Record status: Confirmed
ISSN Centre responsible for the record: ISSN South East Asia Regional Centre
Key title: Journal of engineered fibers and fabrics

Resource information

Title proper: Journal of engineered fibers and fabrics
Other variant title: JEFF

Original alphabet of title: Basic roman
Subject: Dewey : 667
Subject: Colour industries
Corporate author: Fiber Society.
Corporate author: Association of the Nonwoven Fabrics Industry.
Corporate author: Technical Association of the Pulp and Paper Industry.
Corporate author: American Association of Textile Chemists and Colorists.
Publisher: [Gary N.C.]: INDA TAPPI the Fiber Society and AATCC
Receiving publisher (01/12/2018) : SAGE Publishing
Dates of publication: 2006- 9999
Description: Began with vol. 1, issue 1 (2006).
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**TRANSFER DETAILS**

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Welcome to the Transfer Alerting Service

The NISO Transfer Code of Practice sets out best practices for scholarly publishers to ensure that journal transfers between parties occur with minimum disruption and that the content remains accessible. The Transfer Alerting Service (TAS) has been designed to facilitate communication of journal transfers and is hosted by the International ISSN Centre.

The TAS is made up of:

- A database of journal transfers which can be searched or browsed. This allows librarians and other interested parties to access the details of journal transfers announced through the TAS and provides an archive of transfer information supplied by publishers using the service.
- A notification service available through an RSS feed or by signing-up to an email list. Librarians, information professionals, and representatives of other organisations with an interest in journal transfers are encouraged to sign up to the list. Every time a journal transfer is announced through the TAS, registrants receive email alerts detailing the journal(s) involved, bibliographic information, and contact details for the publishers involved.
- An API which may be used by interested parties to query or integrate with the TAS.

Publishers are required to register with the International ISSN Centre to provide journal transfer information for announcement through the TAS. Under the terms of the Code, endorsing publishers are required to use the service whenever they receive a new journal.

For complete information about the Transfer Code of Practice please visit the NISO website (https://www.niso.org/standards-committees/transfer).
EXPLANATIONS ABOUT SEARCH POSSIBILITIES

Search results can be exported to a TSV file that can be opened, searched and sorted in Excel or other programs (the encoding is UTF-16LE and it is tab delimited).

In the query box, one may enter words from any field in the transfer notifications.

These words are implicitly connected by a logical AND operator.

You can also enter ISSN numbers (with or without their central hyphens).

If several ISSNs are entered (copied and pasted from a list for example), they are connected by a logical "OR" operator.

This means one can copy and paste a list of ISSNs in the query box.

The default sorting criteria used is "alert creation date descending". One can select other possible sorting criteria.

Phrase searches are possible: "american journal"
ETAS API

The API is generally RESTFUL and returns results in JSON in a "pretty" version.

API BaseURL

https://journaltransfer.issn.org/api/query=

API syntax

To refine the query, filters may be appended to the BaseURL as a "query string" conformat with the syntax query expressed in the search page (boolean operators etc.)

EXAMPLE: https://journaltransfer.issn.org/api/query=rpcn.cox AND is='American Society for Nutrition'

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All about ETAS

- [https://www.niso.org/standards-committees/transfer/transfer-publishers](https://www.niso.org/standards-committees/transfer/transfer-publishers)
Thank You!

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