Today’s Agenda

- KBART
- PIE-J
- DDA
- OAI

Hosted by ALCTS, Association for Library Collections and Technical Services
• Knowledge Bases and Related Tools
• Joint NISO/UKSG Working Group
• Recommended practice (NISO RP-9) to provide guidance for accurate metadata exchange between content providers and knowledge base developers

• What’s the problem being addressed?
What Can Go Wrong?

• Publisher gives wrong metadata for title to knowledgebase
• Link resolver uses bad metadata to make link
• Link does not resolve to correct target
• Data not current
  – Issue has been removed
  – Provider hasn’t notified that issue is live
Hence, KBart

- Provides simple metadata exchange format – e.g., publication_title, date_first_issue_online
- First adopted as NISO Recommended Practice (RP-9) in 2010, with focus on metadata formatting for journal resources
- Updated in 2014 to include more complex issues in metadata supply – consortia-specific metadata; metadata transfer for open access publications, e-books, and conference proceedings
More Info?

- KBART Registry (contacts, URLs, instructions): [https://sites.google.com/site/kbartregistry/](https://sites.google.com/site/kbartregistry/)
- Interest Group List (get updates, provide feedback): [http://www.niso.org/lists/kbart_interest/](http://www.niso.org/lists/kbart_interest/)
• Recommended Practices for the Presentation and Identification of E-Journals (RP-16-2013)
• The problem to be solved: “Citations form the basis for much scholarly research. Connecting researchers with appropriate content is the goal of OpenURL linking and other reference linking systems. Two things are necessary for accurate identification. First, articles must be cited by the title of the journal in which they originally appeared, which may be different from the title the journal currently bears. Second, the correct ISSN must be used in order for link resolution to accurately happen. Until there is a consistent and universally used identification scheme for articles (the penetration of CrossRef and the DOI is far from universal), researchers have no choice but to rely on existing citation elements.”
What is PIE-J About?

- PIE-J was developed to provide guidance on the presentation of e-journals: title presentation, accurate use of ISSN, citation practices
- Text of RP-16-2013 is available at http://www.niso.org/publications/rp/rp-16-2013
How to Participate

• Report PIE-J-related access or display problem to the publisher/provider by using this template: http://www.niso.org/apps/group_public/document.php?document_id=12536

• Join the PIEJinfo Mailing List for communication about the work of the group, provide feedback, ask questions - http://www.niso.org/lists/piejinfo
Standards For Collection Management
ALCTS Webinar – October 9, 2014

Nettie Lagace, Associate Director of Programs, NISO
Betty Landesman, Head of Technical Services and Content Management, University of Baltimore
NISO Publishes Recommended Practice on Demand Driven Acquisition of Monographs

Document discusses and makes recommendations about key aspects of including users in a library's acquisition process

Baltimore, MD - June 25, 2014 - The National Information Standards Organization (NISO) announces the publication of a new recommended practice, Demand Driven Acquisition of Monographs (NISO RP-20-2014). Demand driven acquisition (DDA), also referred to as patron-driven acquisition, is a method used by libraries for collection development where monographs are purchased at their point of need when selected by users from a pool of potential titles. NISO's Recommended Practice discusses and makes recommendations for publishers, vendors, aggregators, and libraries about key aspects of DDA, goals and objectives of a DDA program, choosing parameters of the program, profiling options, managing MARC records for DDA, removing materials from the consideration pool, assessment of the program, providing long-term access to un-owned content, consortial considerations for DDA, and public library DDA. Although DDA is more commonly used for e-books, the method can also be applied to print publications and these recommendations provide a single set of best practices for both formats, with articulation of differences where they occur.

http://www.niso.org/publications/rp/rp-20-2014
NISO DDA RP Charge

• Develop a flexible model for DDA that works for publishers, vendors, aggregators, and libraries.

• Model should allow for DDA programs that
  – Meet local budget and collection needs
  – Allow for consortial participation
  – Support cross-aggregator implementation
  – Account for how DDA impacts all functional areas of the library

Hosted by ALCTS, Association for Library Collections and Technical Services
Areas of Recommended Practice

1. Establishing Goals
2. Choosing Content to Make Available
3. Choosing DDA Models
   - Mix of auto-purchase and STL based on goals of program
4. Profiling
   - DDA profiles should be based on the broadest definitions possible within these areas, and relative to goals of the program
Areas of Recommended Practice

5. Loading Records
6. Removing Content
7. Assessment
   5. Decide from the start! Many possible data sources
8. Preservation
9. Consortial DDA: 3 basic models
10. Public Library DDA

Hosted by ALCTS, Association for Library Collections and Technical Services
What’s Next

• Standing Committee formation for support, promotion, future revision, etc.
  http://www.niso.org/workrooms/dda/

• Read the RP!
  http://www.niso.org/publications/rp/rp-20-2014

• Survey details...
  http://www.niso.org/apps/group_public/download.php/12541/DDA_Survey_Results.pdf

Hosted by ALCTS, Association for Library Collections and Technical Services
Access & License Indicators

Hosted by ALCTS, Association for Library Collections and Technical Services
Working Group Objectives

1. Specified format for bibliographic metadata and possibly, a set of visual signals, describing the readership rights associated with a single scholarly work
2. Recommended mechanisms for publishing and distributing this metadata
3. A report on the feasibility of including clear information on downstream reuse rights within the current project, and if judged feasible, inclusion of these elements in outputs 1 & 2
4. A report stating how the adoption of these outputs would answer (or not) specific use cases to be developed by the Working Group
<free_to_read> tag

- Indicates content can be read or viewed by any user without payment or authentication
- Simple attribute of "yes" or "no"
- Optional start and end dates to accommodate embargoes, special offers, etc.

```xml
<free_to_read="no" start_date="2014-02-3" end_date="2015-02-03"/>

<free_to_read="yes" start_date="2015-02-3"/>
```
<license_ref> tag

- Content of this tag to include a stable identifier expressed as an HTTP URI
- URI points to license terms that are human and/or machine readable
- Multiple URIs can be listed if article exists under specific license for certain period of time and then changes

<license_ref start_date="2014-02-03">http://www.psychoceramics.org/license_v1.html</license_ref>
<license_ref start_date="2015-02-03">http://www.psychoceramics.org/open_license.html</license_ref>
Questions From Day 2?

Nettie Lagace, Associate Director of Programs, NISO
Betty Landesman, Head of Technical Services and Content Management, University of Baltimore