

## **NISO Work Plan:**

Recommended Practice for Enhancing KBART for Automated Exchange of Title Lists and Library Holdings

July, 2017

For more background, see approved work item proposal at

[http://www.niso.org/apps/group\\_public/download.php/16687/NISO%20Work%20Item%20Proposal-KBART%20Automation%20for%20VM%20approval.pdf](http://www.niso.org/apps/group_public/download.php/16687/NISO%20Work%20Item%20Proposal-KBART%20Automation%20for%20VM%20approval.pdf)

**Work Item Title:** Update and extend the KBART Phase II recommended practice[1] to support individual library holdings of electronic products and to automate the request and retrieval of KBART reports for title lists and library holdings.

## **Project Goals:**

1. Extend the KBART Phase II format to more effectively allow the exchange of title lists for automated updates by including the identity of the title list/package and the provider of that title list/package. (Move away from overloading the file name with this information.)
2. Propose an optional JSON format for KBART data allowing for efficient inclusion of multiply occurring elements (e.g. ISxNs, Title History)
3. Consider adding standard or optional elements to the KBART format to improve the bibliographic data being exchanged (such as description of title history, classifications/subjects).
4. Consider leveraging the NISO SUSHI-Lite[2] specification that is currently under development to provide the mechanism to request and retrieve KBART title lists and holdings data in JSON format.
5. Create at least one proof-of-concept delivering KBART data via a REST service
6. Produce a recommended practice that extends the KBART format and provides for the automated exchange of title lists and holdings.

## **Specific Deliverables:**

1. Analysis of current landscape
2. A specification for an API that will serve as the foundation for automating the exchange of KBART data for vendors, consortium and individual libraries
3. A Swagger hub account that can be used to allow the working group to collaborate on development of the API Specification and to serve as online documentation for the API
4. A NISO Recommended Practice that describes the API specification and its intended use.
5. A series of use cases we intend to support.
6. At least 2 working prototypes to demonstrate the exchange of KBART data
  - a. Client PoC

- b. Server PoC
7. Marketing & Education
  - a. Member Education and Communication Plan
    - i. Define audience (tech and business for content providers, KB vendors and libraries)
  - b. Presentation material (PPTs) as appropriate
  - c. Conference proposals as appropriate
  - d. NISO Webinars
  - e. Presentation of use cases
  - f. FAQs
  - g. Page(s) on public NISO KBART web area
8. A list of proposed modifications to KBART to be considered by the main KBART standing committee.

## Process:

Generally the working group will meet via telephone and WebEx to create the deliverables. Test versions (proofs of concepts) of the proposed solution will be developed in concert with the specifications so that proposed concepts can be tested and refined and subsequent marketing and education can take

More specifically.

- Initial work: Form a series of sub-groups to tackle deliverables in parallel
  - Create subgroup to analyze current landscape and make recommendations for scope of work
  - Create a subgroup to document use cases
- Meet as group to discussion solution recommendation
- Identify elements/concepts missing from today's KBART and/or publisher implementations
- Make recommendations for addressing missing items
- Develop a specification
- Create one or more proofs of concepts
- Document specification
- Circulate as draft
- Obtain and review feedback
- Create final recommended practice
- Develop education and awareness documentation
- Create recommendation for how adoption and compliance could be tracked -- could be related to, promotion and education
- Create/contribute to web presence with FAQs PPTs, etc. (determine where the web presence)

## Partners and Participation:

The committee members should be drawn from the community that would benefit from these new features and who have the skill set to produce a specification that is effective in using current approaches to web services. The organization types we would like represented are as follows:

- KB providers – the primary consumers of the services to automatically retrieve KBART data and to use the extended elements. Include representatives from GOKb and from commercial KB vendors.
- Publishers – would implement the technology for delivery of title lists and library holdings.
- Full Text Database Providers – would also be expected to exchange title lists and customer holdings but have a slightly different organization of the data than publishers.
- COUNTER representative – to ensure that the needs for entitlements, as expressed to COUNTER, are being addressed.
- Discovery/Link resolver/ERM vendors – who would be interested in automated exchange of customer holdings
- Librarians – who are interested in accurate representation of their holdings in discovery services, link resolvers and ERMs; who would be merging COUNTER reports and holdings data for more complete analysis of subscribed resources.

The following skill sets from working group participants are needed; these many come from any of the participating organizations and a given individual may possess more than one of these skills:

- Experience in developing REST services and knowledgeable in JSON and XML.
- Understanding of a knowledge base/ERM provider's needs for managing title lists and holdings data in a KB/ERM.
- Understanding of a publisher/content provider's needs to provide title lists and individual library holdings to update KBs (title lists), ERMs, link resolvers & discovery services (library holdings).
- Understanding of how link resolvers, ERMs and/or discovery services use title lists and library holdings.
- Writing and communication skills for preparing and communicating the proposed recommended practice.

## Timeline:

- Appointment of the working group: Month 1 (April, 2017)
- Approval of initial work plan: Month 3 (July 2017)

- Completion of Information Gathering (use cases and current landscape) and Analysis: Month 6 (Oct 2017)
- Creation of prototype: Month 11 (March 2018)
- Completion of Initial Draft: Month 13 (May 2018)
- Circulation of draft for 30-day public comment period: Month 14 (June 2018)
- Coordination of marketing and education elements needed: Month 14/15 (June/July 2018)
- Completion of Final Draft for Publication: Month 17 (September 2018)

1 <http://www.niso.org/publications/rp/rp-9-2014/>

2 SUSHI-Lite ([http://www.niso.org/workrooms/sushi/sushi\\_lite/](http://www.niso.org/workrooms/sushi/sushi_lite/)) is a NISO initiative to develop an optional approach to retrieving COUNTER reports leveraging RESTful web services techniques to add much more flexibility to SUSHI while making it easier to implement. SUSHI-Lite's filter mechanism and support for multiple kinds of reports makes it (or its approach) suitable for automating the harvesting of title lists and holdings as envisioned by this KBART work-item.