• Putting ONIX SPS to Work - Online
  – Tim Devenport
    Nature Publishing Group & EDItEUR

• Serials Online Holdings
  – Jerry Ward
    ProQuest Platform Product Manager

• ONIX-SRN: Serials Release Notification
  – William Hoffman
    Information Architect, Swets Information Services

• Q&A
  – Joined by Katharina Klemperer, EDItEUR Consultant
NISO 2009 Events

NISO AVIAC Meeting
Friday, January 23 • 4:00 - 5:30 p.m.
Denver Convention Center, Room 301

NISO Update
Sunday, January 25 • 1:30 - 3:30 p.m.
Denver Convention Center, Room 702

2009 Q1 Webinars

• January 14: Preserving Digital Content
• February 11: Authentication
• March 11: Data Movement & Management

* Register for three, get one free!
* Register for all 2009 webinars, and get 50% off

NISO/EDItEUR Webinar • December 11, 2008
Putting ONIX SPS to Work - Online

Tim Devenport
Nature Publishing Group & EDItEUR

NISO/EDItEUR ONIX Webinar, December 08
Overview

- NPG Context
- Entitlements to online resources
- Why XML?
- And why ONIX SPS?
- Implementation
- Benefits and future plans
- ICEDIS transition to XML
- Pricing pilots, e-activation and more
- Conclusions, questions & resources
NPG Context

- Nature Publishing Group offerings
- Online (and print) products
- Titles and business models
- Palgrave Macmillan
- Journals and (soon) e-book subscriptions
- Support for range of publishing functions
- From “conventional” through to innovative
- Key element is the subscription model in its many guises
Fulfillment & online entitlements

- Case study: communicating information about entitlements to online resources
- Almost all NPG & Palgrave online resources are hosted on the Nature.com platform
- Functions include hosting, search, registration, user authentication, content alerting
- Subscription management & fulfilment are supported by THINK Enterprise system
- The challenge: to get THINK Enterprise and Nature.com talking in a speedier, reliable and more automated way
- The payload: who has subscribed to what for how long under which specific conditions?
Apart from immediacy and reliability, we were looking for a number of features:

- An XML-based mechanism: THINK Enterprise and Nature.com are both “native speakers”; integration easier; forward planning of web services
- A structured, rich and extensible methodology
- A well-documented solution that we wouldn’t have to develop or maintain ourselves
- A standard recognised in the wider community, enabling contacts with other hosting platforms without extensive rewrites
Why ONIX for Serials SPS?

- And why ONIX SPS?!
- It already ticked just about all the boxes!

- It exists! Built on its ONIX heritage it is already a mature standard
- ONIX documentation is clear & extensive, and externally maintained by the EDItEUR team
- ONIX’s “concept dictionary” and code values are actually far richer & more extensive than we needed
- An industrial-strength XML schema is provided, allowing us to parse and thus error-trap outgoing and incoming messages
- The ONIX family has a good fit with other XML messaging we plan for subscription-related transactions and exchanges, internal & external
<ONIXSPSPProductListPriced> <SubscriptionProductRecord> <SerialVersion> 
<OnlineVersionScope> 
<OnlinePackage> 
Mandatory and repeatable within <OnlineVersionScope>. Details of online content for the specified serial version from a specified content hosting system or online publisher. Repeatable if the serial version is available through multiple content hosting systems or from multiple online publishers.
Implementation & benefits

- Mapping of information elements:
  - THINK Enterprise to ONIX SPS (Operations development team)
  - ONIX SPS to Nature.com database (Nature.com developers)
- Subscription status of interest, e.g.:
  - New order, renewal, amendment, cancellation
  - Paid, gratis, trial, etc.
- Decisions on filtering, i.e. which classes of subscription to include
- Pulling and ingesting the chosen elements
- Polling for changes in status
- Transport mechanism: currently secure FTP but in future, API and/or web service
Passing entitlements to Nature.com

Think Enterprise

Polling the database for changes

Service query

ONIX SPS

App server

Web servers

Content repository

Nature.com DBs

Access to online resource

Upload Report

Welcome Email

Customer Service

Fulfilment

THINK Support

End users

NPG - Administration

ONIX for Serials SPS

Online Entitlements Link

App server

Web servers

NPG - Administration

THINK Support

NPG - Administration

THINK Support

Datenquellen: 34

Datenquellen: 34

Datenquellen: 34

Datenquellen: 34

Datenquellen: 34

Datenquellen: 34
Benefits & Future Plans

- In short, it works!
- Two years and hundreds of thousands of exchanges later, this remains NPG’s workhorse method
- The method can be as near real-time as we choose, no more delays waiting for daily batch extracts
- Messages parsed against schema: we know “it’s ok leaving us”, and arriving too
- We have fine-tuned and added different subscription classes or conditions as necessary (e.g. trials, access fees, archival models and most recently e-book subscriptions)
- Next major steps under consideration:
  - Moving from “schlepping” data to real-time look-ups into our THINK Enterprise system / eliminating data duplication
  - ONIX for Serials can offer us vocabulary and syntax for such exchanges, as opposed to message framework right now
Moving ICEDIS to XML

- International Committee for EDI for Serials
- Association of publishers, agents, system vendors, …
- Purpose to provide standards and methods to make the serials supply chain more efficient
- You may remember ICEDIS from such transactions as …
- Need to enhance/extend standards to deal with new business models (online, packages, negotiated & deeply discounted sales, consortia)
- Wish to leverage new technology possibilities & web integration
- Achieve true EDI (or better, e-commerce?) across a range of business transactions
ICEDIS now committed to introducing a new family of XML-based messaging, to be phased in by 2012.

Formulation of a new “e-Activation message”, based upon a slimmed-down ONIX SPS framework.

Similar in some ways to NPG’s implementation, but with additional payload for such things as IP ranges & evidence of payment.

Currently a number of pilots are exploring use of ONIX SPS for exchanges of Price Catalog (essentially, list prices) and information at the Subscription level (including priced records to deal with negotiated, nonlist arrangements).

To add a little spice: competing threesomes (agent, publisher, systems vendors)!

More strategically, initial brainstorm held just before London Online, to identify key business drivers and establish a roadmap for the eventual transition.
Conclusions

1. There are pressing needs, both business and technological, to roll out structured improvements to the subscriptions supply chain
2. XML is currently the best and only game in town
3. ONIX for Serials provides:
   ✓ A range of ready-to-use solutions and, better still,
   ✓ A powerful tool-kit of options for the various “Rumsfeld unknown” challenges we’ll face down the line
4. NISO and EDItEUR involvement underpins continuing development to meet your evolving needs
Some contacts:

brian@editeur.org for questions to the ONIX developers’ team

t.devenport@macmillan.co.uk for background on NPG’s own situation and on ICEDIS’s XML initiatives

For more information, go to:

www.editeur.org where all the existing ONIX for Serials messages can be found, together with downloadable schemas, HTML documentation, release notes, etc.

http://www.editeur.org/onixserials/userguides/ONIX_SPSProductListPriced_0.92.htm for details of the Product List Priced application, currently being trialled

http://www.editeur.org/onixserials/userguides/ONIX_SPSProductSubscriptionsList_0.92.htm for User Guide for SPS Version 0.92, ONIXSPSProductSubscriptionsList message (HTML) for the Product Subscriptions List, also being evaluated by ICEDIS.

www.icedis.org where you’ll find the current, fixed-format standards and in due course details of ICEDIS’s odyssey toward the XML future!

www.nature.com and www.palgrave-journals.com for all your scholarly subscription needs!

Tim Devenport
Who am I?

• 13 years in Tech Support at ProQuest
• Last 5 years as a Linking Specialist
• Now the Platform Manager for the ProQuest Platform
Why use SOH

• Provides a Better User Experience
• Holdings are More Accurate & Current
• Automated Process
• Once-Implemented can be used again and again
How It Works

• Our system generates a set of files every week
• Vendor picks it up via FTP
• They then process the files and load them into their system
• If it is a hosted service the updates are available right away
• The Librarian and by extension user just wants it to “Work”
• Latest issue available addresses pre-published citations
• New products automatically go out to vendors
Items not in SOH

• “S” is for Serials
• Non-Periodical Content not included
• Also excluded Audio/Video Content
• Static datasets – Not part of the weekly file, this reduces the creation & processing time
• Here at ProQuest we have found using ONIX SOH provides better service to other vendors and end users.
• It has also proved adaptable to new projects and resulted in a cost savings.
• When contacted by another organization with a need for our holdings information, our first suggestion is to use ONIX SOH.
ONIX-SRN
Serials Release Notification

NISO / EDItEUR webinar on ONIX for Serials: Case Studies of Use
December 11, 2008
William Hoffman, Swets
New Integration Project

• Existing service: SwetsWise MetaData
• Collection of Table of Contents for 20,000 publications with 26.5 million + articles
• Scheduled delivery (daily, weekly, monthly, or quarterly)
• Multiple format options (proprietary, de facto)
• Develop support for industry standard
Where to start?

Not square one, thanks to

- **W3C XML Schema 2001**
  - Language for defining set of rules for XML documents
  - Richer and more powerful than DTDs
  - Namespaces to avoid element name conflicts
  - Datatypes (string, date, etc...or create your own)
  - Wide Adoption

- **EDItEUR / NISO Joint Working Party for the Exchange of Serials Subscription Information**
  - Books ONIX formed the basis
  - Collaboration for Serials ONIX family of messages - 2002
  - Guiding principal to allow mapping to MARC21 Holdings
  - Serials Release Notification
    - Issue level from 2004-2006
    - Article level from 2006-2008
Let’s get started

Review your internal data exchange requirements
- Process Model
- Use Case
- Terms and Data Structures

XML Tools for parsing / validating / mapping (XSLT Engine)

The XSDs

ONIX_SerialsReleaseNotification_0.92.xsd
definitions of the message-level element
and of complex types specific to the ONIX SRN

ONIX_Serials_CodeLists.xsd
definitions of datatypes common to all
ONIX Serials schemas
Lots of Possibilities

**ONIXSRNIssueNotice – Issue level**
- Enough issue level metadata to update holdings and populate knowledgebases.
- Can announce provisional or expected publication or online availability dates (pre-prints).

**ONIXSRNContentItemDescription – Article level**
- Enough article level metadata to generate bibliographic citations.
- Can announce articles made available online prior to publication of a journal issue.

**ONIXSRNContentItemExtendedDescription – Abstracts, Subject Headings, Reviews**
- Enough information to create entries in abstracting and indexing databases and enhance catalogs.
Gap Analysis

Focus on what is relevant to your application
Compare your Terms and Data Structure

- Provider website address
- Title
- ISSN
- Swets title serial number
- Chronology
- Enumeration
- Release date
- Issue URL
- First Page / Last Page
- Article URL
- Article Title
- Author First & Last name
Mapping Issues

Indicate data that needs to calculated, validated, discarded, and added
- Hardcoding default Sender fields in <Header>

Decisions to be made:
- Advanced notice of serial release?
  <NotificationType>10 or 11</NotificationType>
  10 = Notice of serial release with a confirmed release date
  11 = Advance notice of serial release with a provisional release date
  <onix:ExpectedReleaseDate> or <onix:ReleaseDate>
Key KBART Working Group finding: Inaccurate coverage dates: Users may not be able to access or even be aware of all of the content available to their institutions. Findings is that inaccurate coverage dates, especially end dates that are not updated.
Partial Example

<?xml version="1.0" encoding="UTF-8"?>
<ONIXSRNContentItemDescription version="0.92">
<Header>
  <Sender>
    <SenderId>
      <SenderIdType>07</SenderIdType>
      <IDValue>1234567</IDValue>
    </SenderId>
    <SenderIdName>Swets</SenderIdName>
    <SenderIdContact>ISDC-ES</SenderIdContact>
    <SenderIdEmail>edi@nl.swets.com</SenderIdEmail>
  </Sender>
  <SentDateTime>20080916</SentDateTime>
  <MessageNote>Toc Data</MessageNote>
</Header>

<ReleaseNotice>
<SerialVersion>
  <SerialVersionIdentifier>
    <SerialVersionIDType>07</SerialVersionIDType>
    <IDValue>13679430</IDValue>
  </SerialVersionIdentifier>
  <SerialWork>
    <SerialWorkIdentifier>
      <WorkIDType>01</WorkIDType>
      <IDTypeName>Swets journal title identifier</IDTypeName>
      <IDValue>12345678</IDValue>
    </SerialWorkIdentifier>
    <Title>
      <TitleType>01</TitleType>
      <TitleText>Animal Conservation</TitleText>
    </Title>
  </SerialWork>
</SerialVersion>

…TO BE CONTINUED
Invaluable Resources
Couple closing thoughts

Chick-fil-A Cows: “Eat Mor ONIX-SRN!”

Online validation tool would be welcome.
Questions?

All questions will be posted with presenter answers on the NISO website following the webinar:

www.niso.org/news/events/2008/webinars/o4s
Thank You!

Thank you for joining us today. Please take a moment to fill out the brief online survey.

We look forward to hearing from you!