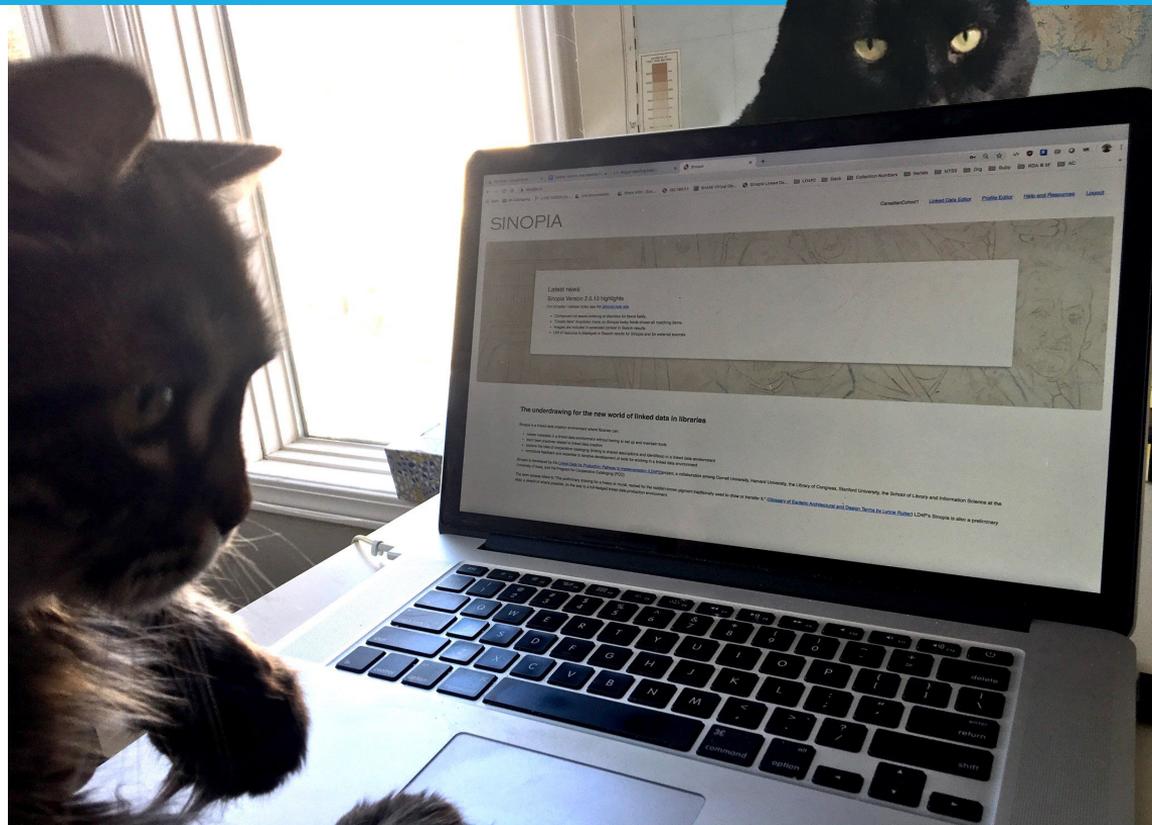# UAL LSP Migration Planning

BIBFRAME Needs & Requirements

What have these CATS been working on?

Ian Bigelow & Abigail Sparling
BIBFRAME Workshop in Europe,
Brussels, September 20th 2023

Outline

1. Overview

2. Linked Data Implementation Plan (LDIP) and LSP Migration
   a. How the projects intersect (timelines)
   b. Implications for approach (what makes sense to do now and what's on hold, what we can hope to solve through migration)

3. Updates to LDIP based on LSP migration planning

4. Translating LDIP to LSP needs and requirements

5. Overview of high level BIBFRAME/LD related LSP requirements

6. Discussion
   a. What are we missing? What would you add if it was your migration? How have you ensured accountability with vendors promise vs. delivery
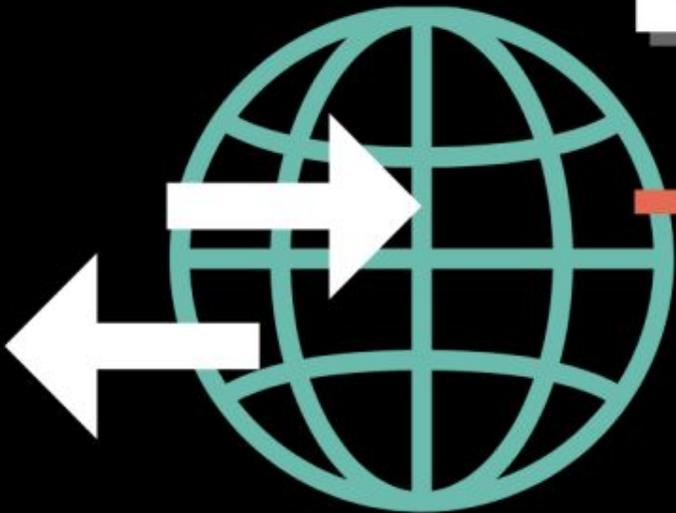
7. Questions

Overview

Linked Data Development Trajectory at UAL

- Experimentation and exploration, xxxx-2017
- *Moving Forward with Linked Data*, 2017-2019
- Assessment and planning, 2019-2022
- *Linked Data Implementation Plan* (LDIP), 2022-2027
  - ○ LSP Migration, 2023-2025

LDIP Goals

- Facilitate different modes of discovery for enhancing user discovery experiences.

- Enable new modes of discovery within and across collections (ours and others').

- Provide open access to our metadata for the widest of audiences.

- Support cataloguing and metadata practices to incorporate more appropriate and respectful terminology in our vocabularies.

- Improve workflows for data transformation, migration, assessment, and enhancement.

- Support long term data preservation with emerging linked data standards.

LDIP and LSP Migration

How the projects intersect:

- Hope to achieve as much as possible from the LDIP objectives through the LSP migration
- Where an LSP vendor cannot provide an immediate solution to meet LDIP objectives, they will need to respond to and outline a plan for how they will complete them with us
- Incorporating LDIP needs into the LSP migration will help with meeting goals for the new LSP

- To **migrate the existing legacy ILS to an LSP with the latest library system technologies, scalable system architecture and infrastructure that can support the strategic goals and long-term needs of the UAL;**
- To have a single enterprise-level LSP that can cover majority of the core library functions of the UAL, and have a centralized platform in managing print and digital collections and client files (patron accounts) and identity management for various client groups;
- To **enhance usability, accessibility, and discoverability of its collections by having an enhanced discovery ecosystem through seamless system integration between the front-end discovery function with the back-end LSP modules and databases;**
- To **streamline the existing workflows and processes with reference to the best practices in the library industries;**
- To enhance the system availability, stability, security while lowering the system maintenance and support costs by migrating to a cloud-based LSP;
- **To lay down the system foundation for the implementation of Linked Data and migration to BIBFRAME.**

LSP Migration Project Charter
Project Objectives

Challenges and Adaptation
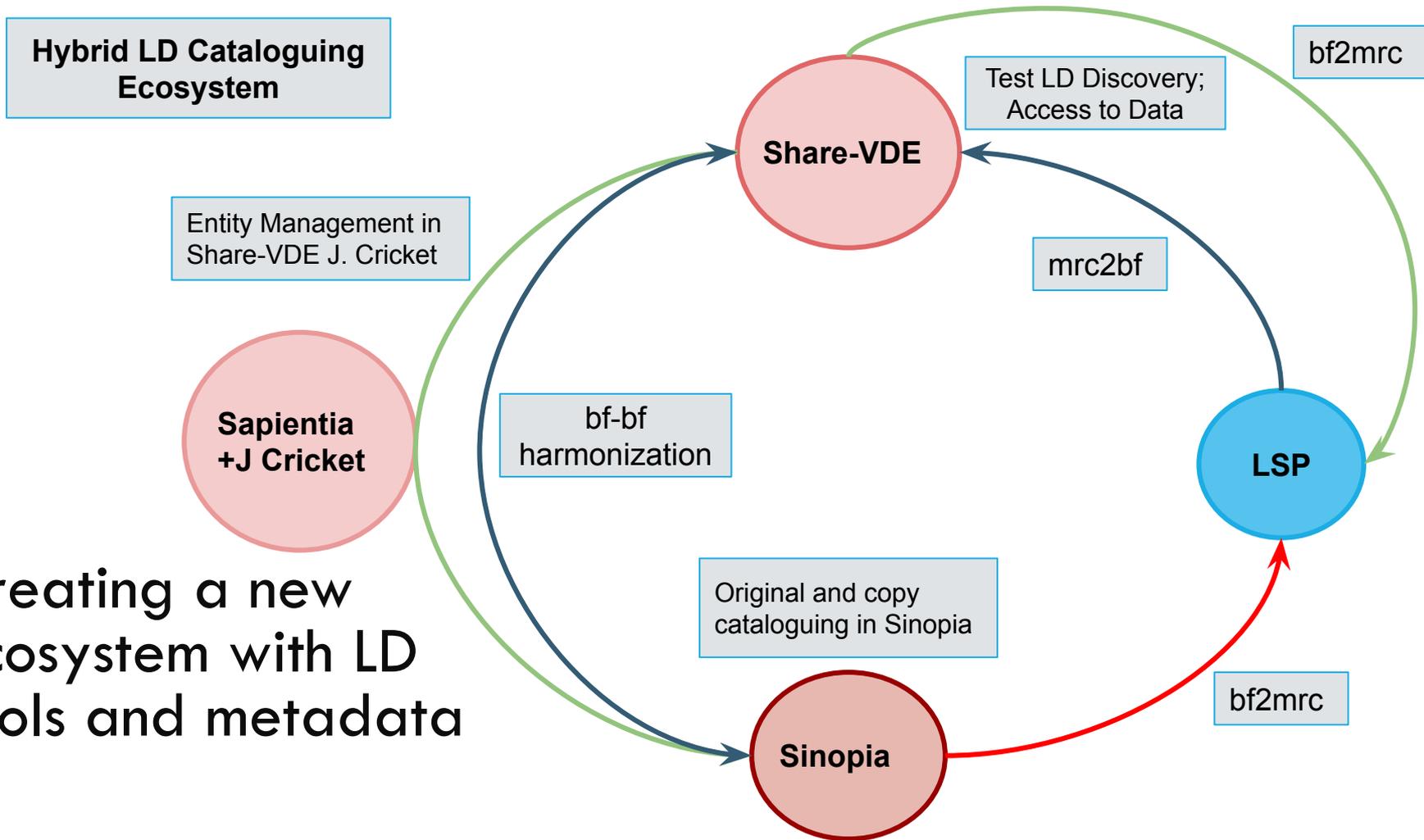
Institutional Change

- Budget cuts and associated reductions of support for in-house technical experimentation

- Shift focus to support community projects and associated integrations

- **New priorities and limitations introduced by upcoming LSP migration**

LSP Migration!

- 2023-2025 - Shorter timeline than Linked Data Implementation Plan

- Linked data and BIBFRAME based needs assessment and requirement building

- **Need to re-evaluate what could be built into a new system rather than having external integrations**

*Updating the Linked Data Implementation Plan is a work in progress

Hybrid LD Cataloguing Ecosystem

Creating a new ecosystem with LD tools and metadata

Entity Management in Share-VDE J. Cricket

Sapientia +J Cricket

Share-VDE

Test LD Discovery; Access to Data

bf2mrc

mrc2bf

bf-bf harmonization

LSP

Original and copy cataloguing in Sinopia

Sinopia

bf2mrc

Ensure that LSP needs assessment includes requirements based on the Linked Data Implementation Plan!

Where we are at in the process

- Just finished:
  - High level needs for the LSP selection process (in general and LDIP related)
  - Prioritization of high level needs (apologies, but we cannot share)
  - Environmental scan of other institutions using select LSP solutions
  - Vendor presentations to inform requirement building
- Upcoming:
  - Further follow up with vendors
  - Detailed needs assessments
  - RFP generation - goal for end of 2023
  - Vendor selection - early 2024

High level LSP Needs - for BIBFRAME

1. **LSP should support use of BIBFRAME data:**
   - **If some components are still in development, proponents are required to demonstrate how they will commit to working with UAL on LDIP to reach that goal. [Vendor should be actively engaged in BIBFRAME community in order to understand needs and stay up to date on developments]**
2. BIBFRAME/LD based metadata, database, and supporting infrastructure:
   - The LSP should support BIBFRAME data as the native data of record and be able to support interoperable use of other BIBFRAME data stores
3. BIBFRAME Editor:
   - Support api connections, or direct integrations of Sinopia, Marva, or equivalent BIBFRAME editor. Cataloguing editor for original and copy cataloguing along with record editing. Should support working on full range of materials within the UAL collection with BIBFRAME.
4. Copy cataloguing mechanism:
   - Tool for querying external data pools for reuse in our own LSP. This should support BIBFRAME reuse use cases and have flexibility to customize targets (individual libraries or other aggregating data pools (OCLC, Share-VDE, PCC, Data Lakes ...)

High level LSP Needs - for BIBFRAME

7. Entity management tool:
   - Need a modern entity management tool that allows for work on maintaining BIBFRAME entities within the catalogue data. This should include URI management, minting, enrichment, entity aggregation and disambiguation et cetera.

8. Support for URI enrichment and management/maintenance:
   - LSP should have tools for URI enrichment, management, and maintenance. This should include the flexibility to customize which URI vocabularies to utilize. Support for URI enrichment and management/maintenance

9. bf2mrc:
   - LSP should support BIBFRAME to MARC conversion processes for data exports for multiple use cases and integrations. Conversion tools should be up to date with latest BIBFRAME specifications/ontology. Conversion tool should support customization for local needs and different flavours of BIBFRAME (ex. Share-VDE vs. Sinopia vs. LC)

10. mrc2bf:
    - LSP should support MARC to BIBFRAME conversion processes for data ingest and related functions. Conversion tools should be up to date with latest BIBFRAME specifications/ontology. Conversion tool should support customization for local needs and different flavours of BIBFRAME (ex. Share-VDE vs. Sinopia vs. LC)

High level LSP Needs - for BIBFRAME

7. BIBFRAME/LD based discovery:
   - The application must be able to leverage linked data (BIBFRAME) to enhance entity discovery (resources, agents, subjects) and surface relevant relationships
8. Open Metadata:
   - UAL catalogue data must be maintained within the LSP as our own data, and as open data. There can be no limitations placed on the use/re-use of UAL catalogue data for UA or external users by LSP tools, processes, or associated integrations or associated agreements related to the LSP and support thereof.
9. Support for multiple vocabularies (authorities/identifier management):
   - Support for manual and automated/batch application/management of multiple vocabularies as specified by UAL documentation
10. Decolonizing Description (alternative labels, forms, authorities):
    - Support for local authority file and/or alternative terminology/labels for discovery. Support should include provision for manual work and batch processing/updates

Insights from vendor presentations

Services and tools on offer:

- BF cataloguing editor integration
- BF data reuse (connections to existing BF data pools)
- MARC2BIBFRAME and/or BIBFRAME2MARC conversion
- Integration of BF LD into the wider web
- Entity creation (but not necessarily entity management)
- LD vocabulary hosting
- Support for BF/BF-related ontology development

Outstanding Questions:

- Implementation timelines
- Leveraging BF LD to improve resource discovery both locally and widely
- BF as LOD, how to ensure open data and data reuse
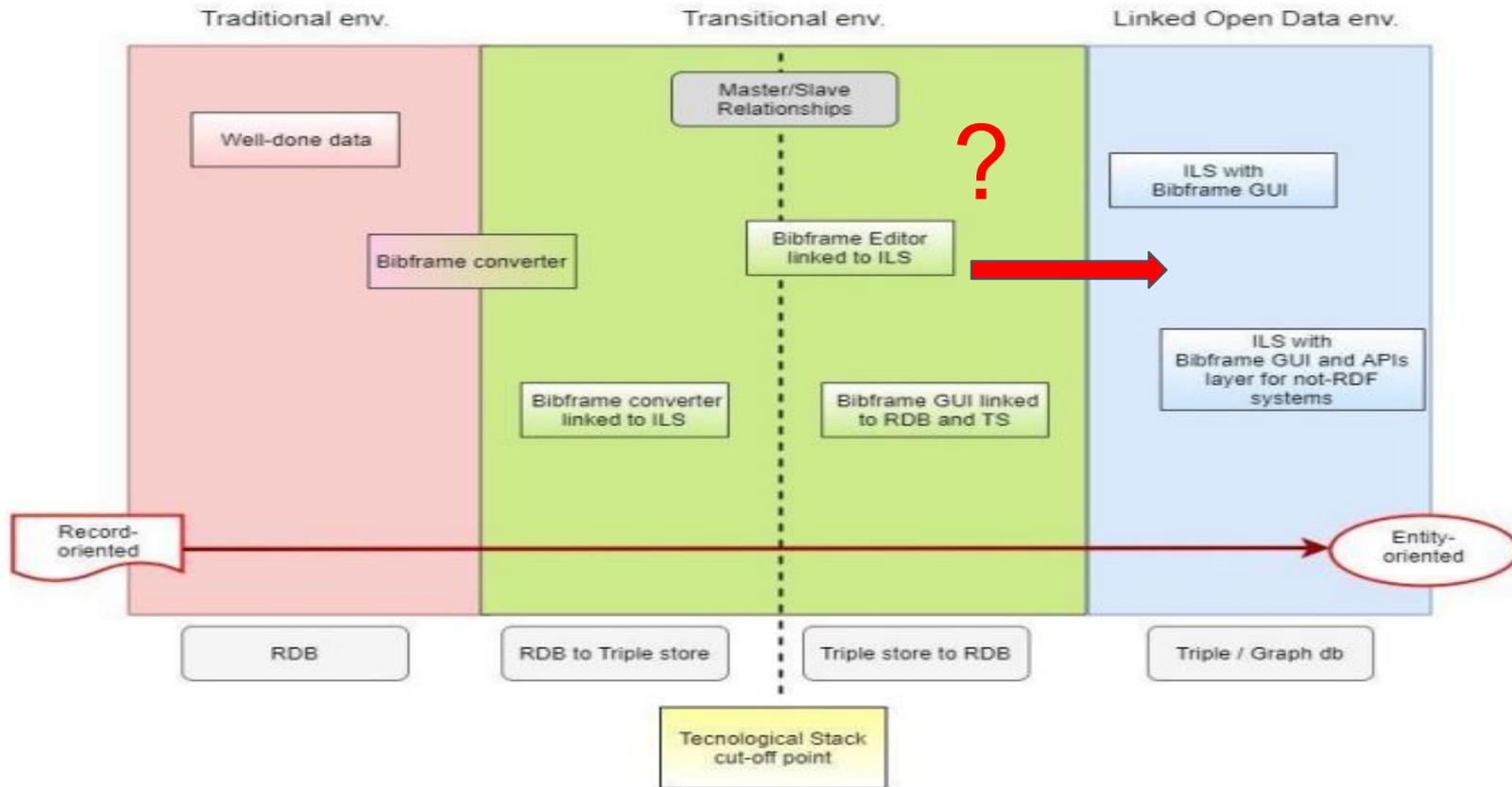
BIBFRAME Expectations for ILS Tenders: A Reflection

- Developed following the first BIBFRAME Workshop in Europe in 2017

"The proposed model can be seen as a sort of 'Maturity model'[2]. The list starts with an entry level item, defining a more traditional scenario, ending with a high level item, already in a future technological scenario (but already under construction). For each item, the Library should assign a score, used to evaluate the level of adhesion and of reception of the BIBFRAME specifications by vendors. This means that each library, depending on its nature, its mission, its type of user and so on, can choose which specific component to define as 'important' and can assign to them (or to it!) a score. The document proposes a sort of "building blocks", that can assume different values in relation to the specific library exigencies."[1]

- The work we're putting into identifying high level BIBFRAME needs for our LSP project feels very similar in many ways to the BIBFRAME Expectations for ILS Tenders … but 6 years on what has changed?

1.   BIBFRAME Expectations for ILS Tenders. Organizer Group 2018 European Workshop BIBFRAME (February 2018).

BIBFRAME Expectations for ILS Tenders: A Reflection

What next?

- Update focus of LDIP during the LSP selection period

- Expand prioritized high level needs into list of detailed requirements for RFP

- Publish RFP by end of 2023 and select LSP solution in Spring 2024

- Further update of LDIP based on the vendor solution, tools, and supporting communities of practice

- Think about how to share our experience, particularly with BF implementation, with the wider community

LSP and LDIP - Finding the right balance and hitting the mark!

Discussion:

- Are we missing any high level requirements?

- What requirements would you add or remove if it was your migration?

- How have you worked with vendors to ensure delivery of in development/roadmapped services and functionality?

Questions?

CATS need BIBFRAME: Hope you enjoyed this ruff overview!