

# KBART Phase III: Changes and Unresolved Questions

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<https://sched.co/ifzm>

# What is KBART?

*Note: The spreadsheet for this data has been split into three sections for viewability in this document. The second and third sections represent additional columns that were appended to the first section in the original spreadsheet.*

publication_title	print_identifier	online_identifier	date_first_issue_online	num_first_vol_online	num_first_issue_online	date_last_issue_online	num_last_vol_online	num_last_issue_online
Dante and Aquinas	978-1-909188-03-7	978-1-909188-07-5	2013-05-15					

title_url	first_author	title_id	embargo_info	coverage_depth	notes	publisher_name	publication_type
<a href="http://www.ubiquitypress.com/files/DanteAndAquinas.pdf">http://www.ubiquitypress.com/files/DanteAndAquinas.pdf</a>	Ryan	10.5334/bad		fulltext	Published under CC-BY license	Ubiquity Press	monograph

date monograph published_print	date monograph published_online	monograph_volume	monograph_edition	first_editor	parent publication title_id	preceding publication title_id	access_type
2013-05-15	2013-05-24		1	Took			F

# KBART History

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**2010** - KBART Phase I published (UKSG/NISO working group, 2007-2014)

- Improve data supplied to knowledge bases and link resolvers to improve OpenURL linking for journals.

**2014** - KBART Phase II published (NISO KBART Standing Committee, 2014-)

- Expands KBART to include e-books and conference proceedings, OA content, metadata for consortia.

**2019** - KBART Automation published

- Companion to KBART providing for automated transfer of institution-specific KBART-formatted files from content providers to knowledge bases.

# Who is the KBART Standing Committee?

## Co-chairs

### Noah Levin

*KBART Standing Committee Co-chair*

### Andrée Rathemacher

*Professor / Head, Acquisitions  
University of Rhode Island*

## Members

### Davin Baragiotta

*IT Lead  
Consortium Érudit*

### Dominic Benson

*Analytics and Discovery Officer  
Brunel University London*

### Courtney Bremer

*eResources Access Manager  
University of Waterloo Library*

### Mark Calkins

*Senior Product Support Specialist  
OCLC*

### Stephanie Doellinger

*OCLC Online Computer Library Center*

### Elif Eryilmaz-Sigwarth

*Technical Product Manager  
Springer Nature*

### Jason Friedman

*Manager, Member and Metadata Services  
The Canadian Research Knowledge Network*

### Robert Heaton

*Collection Management Librarian  
Utah State University Libraries*

### Benjamin Johnson

*Engagement Manager, Provider Relations  
ProQuest*

### Sheri Meares

*EBSCO Information Services*

### Jonathan Ponder

*ITHAKA/JSTOR/Portico*

### Christine Stohn

*Senior Product Manager, Discovery & Delivery  
Ex Libris/Proquest*

### Joey Wilson



*Cataloger  
Alexander Street*

### Julie Zhu

*Manager, Discovery Service Relations, Marketing, Sales & Design  
IEEE*

# KBART Phase III

1. Draft Phase III proposal
2. Seek approval from NISO Information Discovery & Interchange Topic Cmte.
3. Identify working areas and needed subgroups
4. Identify areas of expertise needed and recruit new members
5. Review/Outline Period
  - a. Research new recommendations with emphasis on what providers currently send and what KBs can utilize
  - b. Subgroups to create outline of new recommendations
6. Complete initial draft
7. Circulation of draft for 30-day comment period
8. Marketing and education
9. Incorporate requests from public comments and complete final draft for publication



Started in  
March 2020

# KBART Phase III Work Items (1)

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- **Clarify Current Recommendations** 😎
  - Simplified, but expanded information on the metadata fields needed.
  - Better examples.
  - Revised guidance on handling Gap Coverage, Title Changes and History, Withdrawn/No longer available titles, and Open Access content.
- **Endorsement Process**
  - Create different levels of endorsement.
- **Additional Content Types**
  - KBART Phase II only allows for journals and e-books.
  - Phase III will create support for:
    - Textual content (blogs, transcripts, websites, manuscripts, datasets, etc.).
    - Non-textual content (audio, video, images, etc.).

# KBART Phase III Work Items (2)

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- **Global Content**
  - KBART Phase III will identify translations of items or and allow representation of author names or titles in multiple languages.
- **File Guide 🕶️**
  - Content providers have an extensive catalog of content for sale (by content type, subject, geographic region, consortium, etc.) This results in a separate KBART file for each offering.
  - The File guide introduced in KBART Phase III creates a document from content providers that serves as a guide to their files. This will reduce confusion amongst libraries and knowledge base suppliers as files are added, removed or changed.

# KBART Phase III Work Items (3)

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- Create new licensing language 😎
- Investigate new format options
  - Create a road map for future usage of format options for KBART: for example JSON, XML.
  - These other formats would not replace the current delimited text, but would offer other options.
  - This creates flexibility for KBART Automation and API's.
- Article/chapter-level data
  - Create a roadmap for future article/chapter-level data.
  - Allows for content providers that sell content on article/chapter level.
  - Will accommodate hybrid OA content.
- KBART Mission Statement 😎
  - Recognize current KBART usage and KBART Automation.



# KBART Phase III – KBART Mission Statement

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Originally envisioned to improve the efficiency and effectiveness of OpenURL communication, KBART usage has expanded greatly since its inception, with wide adoption. Currently, KBART files are used for a number of purposes including:

- Knowledge bases use KBART files to facilitate linking to available content.
- Discovery systems use knowledge base holdings, created by KBART files, to indicate institutional holdings in the discovery layer.
- Content Providers use KBART files to communicate to libraries and institutions their available holdings.
- Libraries and library consortia use KBART files as a tool for e-resource management, to track their holdings.
- Content Providers use KBART to communicate their own package lists internally.

# KBART Phase III — KBART Mission Statement

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Although KBART is used heavily for communicating title level holdings and linking information, it should be noted that KBART is not a bibliographic recommended practice. The data contained in KBART is sufficient to allow readability of the files to allow knowledge bases to correctly identify what titles and journals are in the file. More robust bibliographic data must come from MARC, ONIX or other bibliographic metadata feeds which KBART does not replace.

# NISO Plus feedback

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At the NISO Plus conference in February 2021, we asked attendees four questions:

- How are you using KBART today?
- How would you like to use KBART that is not possible today?
- What additional content types do you wish KBART supported?
- What additional fields would best support new content types?

# NISO Plus feedback

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How are you using KBART today?

- Platform providing KBART files on demand for libraries
- Publisher sharing KBART files (generic and customized) with institutions subscribing to content
- Subscriber (library) using KBART files to cross-check content coverage and verify metadata
- Subscriber (library) using KBART files to auto-load holdings into library management system to enable discovery and access
- Subscriber (library) using KBART files to add/update holdings in OCLC WorldCat

# NISO Plus feedback

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How would you like to use KBART that is not possible today?

- Cover content types not currently supported
- More automation
- Link related ISBNs
- Authority control fields for authors, e.g., ORCIDiDs
- Identify and use effectively all possible key identifiers (persistent identifiers etc.)
- Straightforward map/crosswalk to other schema for metadata (e.g. MARC or Dublin Core).

# Additional content types - NISO Plus feedback

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What additional content types do you wish KBART supported?

- Audio-visual materials (video, audio, streaming media, etc.)
- Images
- Archival materials
- Standards
- Simulations, AR, VR
- More granular items, from book chapters and articles to 'non-standard' and unpublished materials such as archival materials, manuscripts and ephemera in digital archives.

# Additional content types - NISO Plus feedback

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What additional fields would best support new content types?

- A “content\_type” field.
- Duration
- Additional contributor fields, e.g. Director
- Relevant identifiers for AV and non-textual formats
- Separate KBART files (with different fields) for non-textual formats
- Content, carrier, media fields as per RDA standards
- Provenance
- Accessibility compliance statement such as W3C Web Accessibility Initiative (WAI)

# KBART Phase III — Gap coverage

**Phase II:** List title twice if coverage gap of greater than **12 months**;  
Greater granularity in reporting data coverage gaps is desirable and should be agreed on with the knowledge base link resolver supplier if it can be supported.

**Phase III:** List title twice if coverage gap of greater than **6 months**.



JOURNAL

## Actas dermo-sifilográficas.

Academia Española de Dermatología y Sifilografía.; Academia Española de Dermatología y Venereología. Madrid, Academia Española de Dermatología y Sifilografía. 1909

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Available from 06/01/2012 volume: 103 issue: 5 until 06/01/2012 volume: 103 issue: 5.

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Available from 07/01/2014 volume: 105 issue: 6 until 08/01/2014 volume: 105 issue: 6.

Available from 12/01/2014 volume: 105 issue: 10 until 12/01/2014 volume: 105 issue: 10.

Available from 01/01/2016 volume: 107 issue: 1 until 02/01/2016 volume: 107 issue: 1.





# KBART Phase III — OA content

KBART files communicate title level information and do not currently handle article or chapter level access. Due to this, communicating freely available articles and chapter level access (ie. hybrid open access) is not supported in KBART.

Identifying Freely Available/Open Access content cannot be accomplished by a single field, but a combination of three elements, the file type, coverage statement (start date, end date and embargo), and Access Type.

1. **File type:** If a subset of a provider's content is available open access, a separate KBART file should be created for that content. (Open access content may also be included in other packages.) Examples: Wiley Online Library Open Access; Cambridge Books - Open Access.
2. **Access type:** Three possible values: P (paid), F (free), M (mixed/hybrid/selected).

# KBART Phase III: Join the discussion!

You will receive a link in the Zoom chat for an interactive URL

<https://easyretro.io/publicboard/3skbaWnbSOWf5M0Fa2uwEgfWua82/8a8849d5-3c11-41ea-a12e-d2d17c330131>

Let's Discuss!

- *How are you using KBART today?*
- *How would you like to use KBART that is not possible today?*
- *What additional content types do you wish KBART supported?*
- *What additional fields would best support new content types?*
- *What do you think about KBART Phase III's proposed treatment of gaps in coverage?*
- *What do you think about KBART Phase III's recommendations for handling OA content?*

# KBART Phase III: How can you be involved?

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Contact us by email: [kbart@niso.org](mailto:kbart@niso.org)

Join the interest group mailing list: [https://groups.niso.org/lists/kbart\\_interest/](https://groups.niso.org/lists/kbart_interest/)

Respond to the KBART Phase III draft during the public feedback period.