

## KBART Style Guide

This Style Guide has been created by the [KBART Standing Committee](#) as a supplement to the official [KBART Phase II Recommended Practice Report NISO-RP-9-2014](#) to provide some additional clarification and examples to follow for Content Providers seeking to adopt KBART for their own files. Please see the KBART NISO Workroom linked above for additional information and resources that can help you improve your data through the KBART Recommended Practice.

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### **6.1. Method of Exchange**

- Content providers should post holdings data to a dedicated public webpage or FTP/SFTP site.
- If posting to the web or FTP/SFTP is unachievable, email is an acceptable alternative.

### **6.2. Frequency of Exchange**

- KBART files should be made available any time changes in the offerings of a package or title list are made that would impact a KBART file.
- Changes that would require new files to be regenerated include:
  - Updates to title-level coverage
  - Titles within the collection offering have been added or removed
  - Significant metadata has been updated (e.g. title\_url)
  - Quality issues
- Only files impacted by the change should be re-generated and made available for consumption.
- If a content provider is not able to detect changes that would impact KBART files a monthly metadata update is recommended.
- The content provider should communicate the frequency of the data delivery to the knowledge base suppliers. With the intended frequency of updates known, the knowledge base supplier can then use the date stamp supplied in the file name to troubleshoot issues with data currency or file ingestion.

### **6.3. Data Contacts**

- Content providers and knowledge base suppliers should designate specific staff members to be responsible for files and exchange.

- This information can be made available via the KBART Registry (<https://sites.google.com/niso.org/kbart-registry>), which includes a web form for registering the organizational contacts as well as the platform and metadata URLs.

#### 6.4. Data Format

- All metadata should be provided as plain text.
- Text should be encoded as UTF-8.
- Files should be Tab separated values with column headers.

#### 6.5. File Name

- File naming convention:  
`[ProviderName]_[Region/Consortium]_[PackageName]_[YYYY-MM-DD].txt`
- Provider Name is the name of the platform where data is hosted (without punctuation).
- Region/Consortium is where the package is sold or to what consortium it is available. If the file is for a universal list, the term “Global” should be used.
- Package Name is the name of the collection as customers would expect to see it labeled within the knowledgebase (again without punctuation).
- Date is the file creation date using the ISO 8601 date format

File name examples:

- TaylorandFrancis\_Global\_AllTitles\_2014-03-08.txt
- IOP\_CRKN\_ElectronicJournals\_2015-01-01.txt
- Springer\_Asia-Pacific\_Medicine\_2015-01-28.txt

#### 6.6. KBART Data Fields

##### 6.6.1. Fields and Labels

- All fields are mandatory, if they exist and are appropriate to the content.
- All effort should be made to gather the required metadata if possible.
- Every field should appear in the order presented in KBART recommendation 6.6.1.

##### 6.6.2. Publication Title

- This data field is applicable to serials and monographs.

##### **SERIALS**

- Full name of the serial titles as it appears on the print edition or web home page.

- Avoid abbreviations.
- Conference proceedings series titles should be entered as serials; volume titles should be entered as monographs.
- Previous titles of a serial should be listed as separate entries, with their own set of coverage dates corresponding to the period of time in which that title was used.

Serials title change examples:

publication_title	print_identifier	date_first_issue_online	date_last_issue_online
American Politics Quarterly	0044-7803	1973-01-01	2000-10-01
American Politics Research	1532-673X	2001-01-01	
Journal of Internet Cataloging	1091-1367	1997-01-01	2008-12-31
Journal of Library Metadata	1938-6389	2008-01-01	
Journal of New Drugs	0096-0284	1961-01-01	1966-21-31
Journal of Clinical Pharmacology and the Journal of New Drugs	0095-9863	1967-01-01	1970-12-31
The Journal of Clinical Pharmacology and New Drugs	0021-9754	1971-01-01	1973-12-31
The Journal of Clinical Pharmacology	0091-2700	1974-01-01	

## SERIALS TITLE HISTORIES

- Previous titles of a serial should be listed as separate entries, each with its own set of coverage dates corresponding to the period of time when that title was used.
- The [Preceding Publication Identifier](#) can be used to indicate relationships between previous and later titles.
- Publishers should provide title history information if available. The KBART standing committee will alert publishers to missing title history information in their files and recommend its inclusion.

## **MONOGRAPHS**

- Give the full name of the publication as it appears on the print edition or on its web home page.
- Special characters should be encoded using the UTF-8 character set.
- Package titles should not be given as individual titles within metadata files.
- Leading articles should be included in natural language order.

### **6.6.3. Print Format Identifier**

- This data field is applicable to serials and monographs.
- For serials, provide the ISSN. Use all 9 characters, including the hyphen and check digit.
- For books, use the ISBN-13 identifier, as available.
- Link resolvers can convert from the 10-digit ISBN, if necessary.
- Where multiple ISBNs or ISSNs exist, only the print format should be used.
- Additional identifiers may be included as extra data after the last utilized position (access\_type in position 25).

### **6.6.4. Online Format Identifier**

- This data field is applicable to serials and monographs.
- For serials provide the e-ISSN. Use all 9 characters, including the hyphen and check digit.
- For monographs, provide the e-ISBNS for a title, if one has been created.
- Additional identifiers may be included as extra data after the last utilized position (access\_type in position 25).

### **6.6.5. Date First Issue Available Online**

- This data field is applicable to serials only.
- The ISO 8601 date format should be used for all dates. Use only those parts of the date that apply, e.g YYYY, or YYYY-MM, or YYYY-MM-DD.
- Non-numeric dates (e.g., Spring or Summer) are not supported in ISO 8601.
- Instead, the use of volumes and issues is preferred in these cases.
- If non-numeric dates are used, the content provider should remain consistent in the application of these throughout cycles of transmission.

### **6.6.6. Number of First Volume Available Online**

- This data field is applicable to serials only.
- Include the volume number of the first issue in this field
- Do not include any captions (e.g., “vol.” or “v.”).
- The house style for citing content may be used, if appropriate.

#### **6.6.7. Number of First Issue Available Online**

- This data field is applicable to serials only.
- Include the issue number of the first issue in this field.
- Do not include any captions (e.g., “no.” or “n.”).
- Do not include supplement or part values.
- The house style for citing content may be used; for example, an alphanumeric value may be used in this field, if appropriate.

#### **6.6.8. Date of Last Issue Available Online**

- This data field is applicable to serials only.
- Provide the date of the last issue available online in the format YYYY-MM-DD.
- Leave this field blank if the journal is available “to the present.”
- If you are providing an Embargo, leave the Date\_last\_issue\_online field blank.

#### **6.6.9. Number of Last Volume Available Online**

- This data field is applicable to serials only.
- Include the volume number of the last issue issue in this field
- Leave this field blank if the journal is available “to the present.”

#### **6.6.10. Number of Last Issue Available Online**

- This data field is applicable to serials only.
- Provide the number of the latest issue online.
- This field will be left blank if the journal is available “to the present.”
- Do not include any labels (e.g. no. or n.)
- The house style for citing content may be used; for example, an alphanumeric value may be used in this field, if appropriate.

#### **6.6.11. Title Level URL**

- This data field is applicable to serials and monographs.
- For serials, this page should link to a listing of the available volumes and issues.
- For monographs, this page should link to a table of contents.

#### 6.6.12. First Author

- This data field is applicable to monographs only.
- For monographs, give the last name of the book's first author.

First author examples:

Title	Author	first_author
100 Decisive battles: from ancient times to the present	Paul K. Davis	Davis
Electrocardiography of Laboratory Animals	Jeffery W. Richig Meg M. Sleeper	Richig

#### 6.6.13. Title Identifier

- This data field is applicable to serials and monographs.
- Give the proprietary identifier for the content title, if you use a title identifier to create links to content.
- If more than one identifier exists, supply the title identifier used for linking.
- If outside parties will not need to know or use these proprietary identifiers, or if no proprietary identifiers exist, this field may be left blank, but it would be preferable to include a title\_id if one exists.

#### 6.6.14. Embargo

- This data field is applicable to serials only.
- If you are providing an Embargo, leave the Date\_last\_issue\_online field blank.
- Embargoes are most often the result of contractual limitations established between the publisher and content provider.
- All embargoes involve a "moving wall", a point in time that is relative to the present date. (e.g. 12 months ago)
- This data field reflects the limitation on when resources become available online.

- The embargo statement has three components: type, length and units.
- Type – Could be one of two values:
  - “R” (“recurring”) is used if access to the journal begins at the moving wall.
  - “P” (“period”) is used if access ends at the moving wall.
- Length – use an integer to express the length of the embargo.
- Units – Supply the units for the number used in the “length” value.
  - “D” is used for days
  - “M” is used for months
  - “Y” is used for years

Data Value	Scenario
R365D	A newspaper database provides access to content for the previous year
P1Y	A journal has a subscription model that gives customers access to all issues except the current calendar year.
P2Y	A journal provides access to all content except for the previous and current calendar year.
R5Y	A journal has an access model that only supplies the past 5 years of content.
P180D	A journal aggregator provides access to all content except for the past 180 days.
R1Y	A provider gives customers access to one “calendar year” of journal content starting in January of the current year.

#### 6.6.15. Coverage Depth

- This data field is applicable to serials and monographs.
- Indicates the extent to which content is covered within the coverage range and embargo fields.
- This field can contain three values:
  - fulltext – Indicates that the fulltext of the journal/monograph is available.
  - selected articles – Indicates that coverage includes the fulltext of some, but not all articles. Coverage policy should be outlined in the notes field.
  - abstracts – Indicates that coverage includes only abstracts of articles.



#### **6.6.16. Notes**

- This data field is applicable to serials and monographs.
- This is an optional free-text field.
- May be used to provide more details pertaining to coverage depth and other exclusions in content.

Notes examples:

- Excludes letters and book reviews.
- Certain articles are Open Access supported by author feeds.
- Excludes graphics.

#### **6.6.17. Publisher Name**

- This data field is applicable to serials and monographs.
- Provide the publisher name of the serial or monograph.
- This data field is of particular importance for packages containing content from multiple publishers.

#### **6.6.18. Publication Type**

- This data field is applicable to serials and monographs.
- This field must contain one of two possible values:
  - Serial – a journal serial or conference proceeding serial.
  - Monograph – an independent book or a volume within a conference proceeding serial.

#### **6.6.19. Date of Monograph First Published in Print**

- This data field is applicable to monographs only.
- Provide the date when the e-book or conference proceeding was published in print.
- This data field is mandatory, except where content is born digital.
- Date format: YYYY, or YYYY-MM or YYYY-MM-DD
- Use only those parts of the date data that apply.

#### **6.6.20. Date of Monograph First Published Online**

- This data field is applicable to monographs only.
- Provide the date when the e-book or conference proceeding was published online.

- This data field is mandatory.
- Date format: YYYY, or YYYY-MM, or YYYY-MM-DD
- Use only those parts of the date data that apply.

#### **6.6.21. Volume for Monograph**

- This data field is applicable to monographs only.
- Provide the volume number of the book, if applicable.
- For conference proceedings, provide the volume number within the conference proceedings series.
- Use of text is acceptable.
- Consistency in use of numbers vs. text is essential.

#### **6.6.22. Edition for Monograph**

- This data field is applicable to monographs only.
- For books, indicate the number of the edition, if applicable.
- It may be that additional text is needed after the edition, e.g., “8th ed. Revised”.
- Use of text is acceptable.
- Consistency in use of numbers vs. text is essential.

#### **6.6.23. First Editor**

- This data field is applicable to monographs only.
- For books and conference proceeding volumes, give the last name of the book’s first editor if there is one.

First editor examples:

<b>Title</b>	<b>Editor</b>	<b>first_editor</b>
America in Revolt During the 1960s and 1970s	Rodney P. Carlisle and J. Geoffrey Golson	Carlisle
Animal Biotechnology	Ashish Verma and Anchal Singh	Verma

#### **6.6.24. Parent Publication Identifier**

- This data field is applicable to monographs only.
- If a monograph belongs to a conference proceeding series or an e-book series, then this field should be populated.
- The value of this field should be same as the title\_id of the conference proceedings series or the e-book series that it belongs to.

#### 6.6.25. Preceding Publication Identifier

- This data field is applicable to serials only.
- Indicate the identifier of the preceding serial title if there has been a change in the title.
- Value of this field should be same as the title\_id of the preceding title in the same file.
- Check the dates of first and last volume/issue match title history.

#### 6.6.26. Access Type

- This data field is applicable to serials and monographs.
- F = Free content
  - 100% of the content must be free
- P = Paid content
  - If a title has some Open Access or free content the access type for a title should be indicated as fee-based, with the value "P."
- In the case of a hybrid title with both free and with paid content, the title records should be repeated as many times as necessary to indicate coverage ranges for which access is free and coverage ranges for which access is paid.

publication_title	print_identifier	date_first_issue_online	date_last_issue_online	access_type
Ecology and Evolution	2045-7758	2011-09-01		F
International Journal of Psychology	0020-7594	1966-02-01		P
American Anthropologist	0002-7294	1888-01-01	1979-12-31	F
American Anthropologist	0002-7294	1980-01-01		P

Influenza and other respiratory viruses	1750-2640	2007-01-01		F
European Journal of Biochemistry	0014-2956	1967-03-01	2004-12-31	F
FEBS Journal	1742-464X	2005-01-01	2014-02-28	F
FEBS Journal	1742-464X	2014-03-01		P

### Extra Fields

- This data field is applicable to serials and monographs.
- If it is desired to transmit additional identifiers, they may be included as extra data in fields after the last KBART utilized position, (access\_type in position 25).
- Multiple values should be delimited using a semi-colon.