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Automating Knowledge Base Maintenance with KBART Integration

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Automating knowledge base maintenance with KBART integration

NETSL Annual Conference 2017
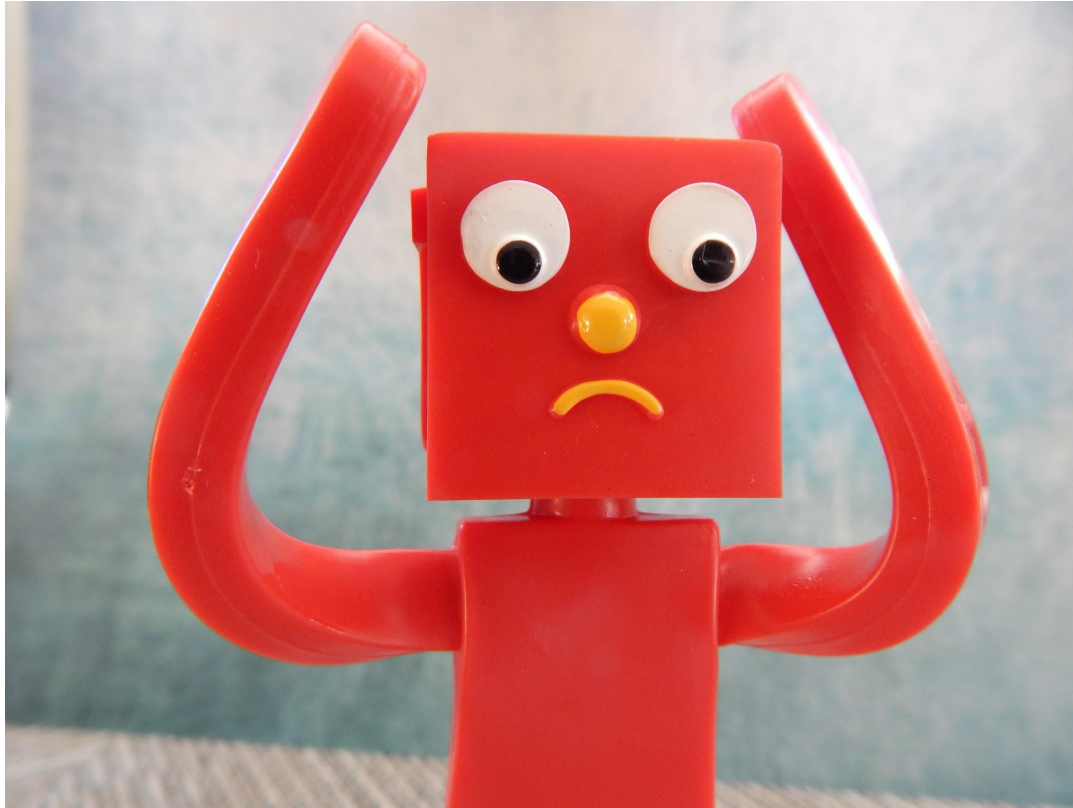*Afternoon Lightning Talks*
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E-resource frustration

Constant maintenance:

- Select new e-resources
- Remove canceled subscriptions (after checking post-cancellation access)
- Keep track of title changes
- Customize holdings that don't match knowledge base default

=> **Time consuming**
=> **High potential for error**

Solution? KBART automatic holdings updates!

KBart

*"**K**nowledge **B**ase **a**nd **R**elated **T**ools"*

- KBART Phase I (2010) developed by UKSG & NISO.
- KBART Phase II (2014) is a NISO Recommended Practice.
- How to communicate content provider holdings data to knowledge bases (for better OpenURL linking).
- For e-journals and e-books.

=> KBART specifies file format, delivery mechanisms, and fields to include.

Sample KBART file (journals)

publication_title	print_identifier	online_identifier	date_first_issue_online	num_first_vol_online
Frontiers of Philosophy in China	1673-3436	1673-355X	2006-01	1
Gene Therapy and Regulation	1388-9532	1568-5586	2000-03	1
Global Journal of Comparative Law	2211-9051	2211-9051	2012-01	1

num_first_issue_online	date_last_issue_online	num_last_vol_online	num_last_issue_online	title_url	first_author
1				http://booksandjournals.brillonline.com/content/journals/1673355x	
1	2004-12	2	4	http://booksandjournals.brillonline.com/content/journals/15685586	
1				http://booksandjournals.brillonline.com/content/journals/2211906x	

title_id	embargo_info	coverage_depth	coverage_notes	notes	publisher_name	publication_type
1673355x		fulltext			Brill	serial
15685586		fulltext			Brill	serial
2211906x	P365D	fulltext			Brill	serial

parent_publication_title_id	preceding_publication_title_id	access_type
		P
		P
		P

File format: Tab-delimited text file delivered via http or FTP.

Knowledge base vendors + KBART formatted files

- Content provider (e.g. Elsevier) generates individual library's entitlements in a KBART file format (note: not part of KBART RP).
- Knowledge base vendor (e.g. OCLC) retrieves file automatically, on a regular basis, and updates library's holdings in their knowledge base.
- Ex Libris SFX and Alma
  - Elsevier (journals and books)
  - OVID (journals and books)
- OCLC WorldShare Collection Manager
  - Elsevier (journals and books)
  - Multiple e-book vendors, including EBSCO, ProQuest, Ebrary, JSTOR, and others.

NON SOLUS

ELSEVIER

Set up

- Contact content provider (e.g. Elsevier) to request the service. They may provide a token or other access credentials.
- Select designated collections in knowledge base, e.g. "Elsevier ScienceDirect Journals Complete" or "Books at JSTOR All Purchased".
- Configure connection to content provider system in knowledge base (Alma) or request collection loading (OCLC).
- "Set it and forget it." Updates are monthly, weekly, or on demand (depends on system). — *Actually, monitor to catch problems!*

Benefits

- Saves time
- Improves accuracy of knowledge base
- Improves discovery and access by patrons

Problem (Alma): Holdings gaps => inaccurate holdings

Library & Information Science Research:

- Entitlement from 1995 to present.
- But, also, earlier entitlement to v.16, no. 1 (1994) and not v.16, nos. 2, 3, 4.

KBART-formatted file excerpt:

Volume 17, Issue 4
pp. 325-429 (Autumn 1995)

Volume 17, Issue 3
pp. 199-324 (Summer 1995)

Volume 17, Issue 2
pp. 101-197 (Spring 1995)

Volume 17, Issue 1
pp. 1-99 (Winter 1995)

Volume 16, Issue 4
pp. 271-360 (Autumn 1994)

Volume 16, Issue 3
pp. 197-269 (Summer 1994)

Volume 16, Issue 2
pp. 85-196 (Spring 1994)

Volume 16, Issue 1
pp. 1-83 (Winter 1994)

date_ first_ issue_ online	num_ first_ vol_ online	num_ first_ issue_ online	date_ last_ issue_ online	num_ last_ vol_ online	num_ last_ issue_ online
1994-12	16	1	1995-02	16	1
1995-12	17	1			

Problem (Alma): Holdings gaps => inaccurate holdings

Library & information science research (Online)
Norwood, N.J. : Ablex Pub. Corp. 1983
● **Online access**

View Online	Details

Open source in a new window

View online: Elsevier ScienceDirect Journals Complete   Show license
Available from 12/01/1994 volume: 16 issue: 1 until 02/28/1995 volume: 16 issue: 1

Holdings statement for v.17, no.1 (1995) to present is missing.

Problem: Serials record *and* book record activated

In the case of records for:

- Book series
- Conference proceedings

Fish Physiology Primitive Fishes
David J McKenzie Anthony P Farrell; Colin J Brauner
Burlington : Elsevier Science 2011
🟢 **Online access**

View Online	Details

Open source in a new window

View online: Elsevier ScienceDirect Books Complete

Fish physiology (Online)
San Diego : Elsevier 1969
🟢 **Online access**

View Online	Details

Open source in a new window

View online: Elsevier ScienceDirect Journals Complete
Available from 1995 volume: 14

(And MARC records for e-books are sometimes lower quality than we would prefer.)

Problem: Reliance on publisher system data

- Are publisher records on the library's entitlements accurate?
- If the KBART integration has removed a holding in error, so that it no longer appears in the library's discovery system, will the mistake be noticed?

Future directions

- A new NISO working group is being formed to create recommendations for this process.
- Goal: "Recommended Practice for Enhancing KBART for Automated Exchange of Title Lists and Library Holdings".
- No work plan yet, but draft estimated around the end of 2018.

Hopefully, with the development of a NISO Recommended Practice, more content providers and knowledge base vendors will offer this valuable service in the future.