Six Impossible Things: Moving KBART into the Next Decade

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“Six Impossible Things”: Moving KBART into the next decade

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Members of the NISO KBART Standing Committee and KBART Automation Working Group
KBART - a short overview

- KBART = Knowledgebases And Related Tools
  - Format for the transfer of (global) **title lists** from a content provider to a KnowledgeBase

- KBART Automation
  - Automatic transfer of KBART formatted **holdings files** from a content provider to a KnowledgeBase on behalf of a specific institution
KBART: Format for the transfer of title lists from content provider to KnowledgeBases
KBART Automation: Process for the automatic transfer of title holdings lists from content provider to KnowledgeBase

KBART Automation in the information landscape
KBART Automation: The flow in detail

1. Institutional Token
2. Institutional Token
3. Request
4. File
5. Upload
6. Update KB content

Content provider
API

Institution/Library

Frontend
Scheduler
Import

KnowledgeBase

One time activity
Scheduled activity

NISO
How the information world connects
KBART in short

Goal:

**KBART**: To increase accuracy of KB content to reflect accurate title list and package/collection offerings of content providers

**KBART Automation**: To allow the automatic localization of KBs by transferring KBART formatted holdings files from content providers to institutional KnowledgeBases

Status:

**KBART Phase 2** published in 2014 - Proposal in phase 3 in approval process

**KBART automation** published in 2019
Some of the changes in our information landscape

- Granularity of level where items become available increases—from title to item level, e.g. hybrid open access journals
- More material becomes available and needs to be managed: From hundred thousands to millions
- Many more material types become available: From journals and books, to book chapters, audio material, images, films, manuscripts, maps ........
- New business models appear and need to be managed

How can KBART help?
Recommended Practice 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
Phase III: Low-hanging fruit

- New needs for KBART files that are relatively straightforward to address
- Additional clarifications of certain areas of KBART, even if no changes are made
Phase III: Low-hanging fruit
More guidance and examples

Content providers that are new to KBART sometimes struggle to get started with bringing their files into compliance.

=> Expanded guidance on what files to create and what metadata to include

=> Clarifications and additional information on data fields as identified by content providers, librarians, and the KBART Automation Working Group

=> More examples of correct implementation of the KBART Recommended Practice, preferably for every field or recommendation
Phase III: Low-hanging fruit
Guide to provider files available

Many content providers have an extensive catalog of content for sale (by content type, subject, geographic region, consortia, etc.). This results in a separate KBART file for each offering.

As content packages change, KB vendors and librarians cannot easily keep track of what has been added, removed, or changed.

=> Content providers create a document that serves as a guide to their KBART files

=> Version history / Addition of add-delete-delta files to flag changes

  ● Would also be useful in supporting KBART Automation
Phase III: Low-hanging fruit
Handling of withdrawn content

Content sold to libraries sometimes is withdrawn from publisher packages.

Usually, current KBART files for packages do not contain content no longer available for purchase.

Libraries that previously purchased content often retain grandfathered access, but content becomes invisible to their link resolvers and disappears from discovery systems because it was dropped from the KB package.

=> Version history / Addition of add-delete-delta files to flag changes
Phase III: Low-hanging fruit
Additional content types

KBART Phase II only provides metadata for serials and monographs.

Content providers with multimedia and non-book/non-journal formats have no recommended way to communicate these holdings.

=> Support for additional content types:

<table>
<thead>
<tr>
<th>Textual</th>
<th>Non-textual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blogs</td>
<td>Audio</td>
</tr>
<tr>
<td>Transcripts</td>
<td>Video</td>
</tr>
<tr>
<td>Websites</td>
<td>Images</td>
</tr>
<tr>
<td>Manuscripts</td>
<td>Etc.</td>
</tr>
<tr>
<td>Datasets</td>
<td></td>
</tr>
<tr>
<td>Etc.</td>
<td></td>
</tr>
</tbody>
</table>

NISO
How the information world CONNECTS
Phase III: Low-hanging fruit
Support for global content

Global content has little support in KBART Phase II.

KBART metadata does not identify translations of items or represent author names or titles in multiple languages.

=> Improved support for global content

- Content with non-Latin characters
- Translated titles
- Transliterated titles
- Names of authors and editors (expand field to include full name?)
- Language of content
Phase III: Low-hanging fruit
Endorsement process overhaul

KBART Phase II endorsement process has only one tier for content providers.

It is not currently clear if knowledgebase vendors can apply for endorsement or what standards should apply to them.

=> Varying levels of endorsement?

- Reward content providers who achieve a “Gold Standard”
- Make endorsement easier for content providers unable to attain 100% compliance
- Endorsement of KB vendors — what does this mean?
- How/if to communicate endorsed providers for earlier versions of RP?

=> Branding and focus of program?

=> Role of KBART Registry in process and its structure/presentation?
Phase III: Low-hanging fruit

Model license language

The Licensor will make available to third-party knowledge base providers an itemized holdings report that specifies the titles included in the Licensed Materials. The Licensor will use reasonable efforts to update itemized holdings reports as soon as is practicable when holdings information changes and will provide this information to knowledge base providers in a timely manner and to the Licensee on request. If the Licensed Materials include content covered by the NISO “Knowledge Bases and Related Tools (KBART) Recommended Practice”, the Licensor will provide itemized holdings reports for the Licensed Materials in KBART-compliant format.

In addition, the Licensor will make available to third-party knowledge base vendors and Subscribing Institutions institution-specific holdings reports. If the Licensed Materials include content covered by the NISO “Knowledge Bases and Related Tools (KBART) Recommended Practice”, the Licensor will make such holdings reports available for automated retrieving via an API that adheres to the requirements in the NISO “KBART Automation: Automated Retrieval of Customer Electronic Holdings” Recommended Practice.
Phase III: Tough questions

- The appropriate scope and purpose of KBART today
- Granularity of metadata covered versus maintaining the Recommended Practice’s simplicity
Phase III: Tough questions
Purpose of KBART

Reasons for expanding KBART’s purpose

● KBART was originally created to support accuracy in OpenURL linking.
● Now it is used to display library holdings in discovery systems and ERMs
● With KBART Automation, linking and identifying institutional holdings becomes a central focus of KBART
● The KBART Recommended Practice needs to support KBART Automation

What is the role and importance of KBART in today’s e-resource ecosystem?

=> Revise KBART mission statement to reflect the current use of the Recommended Practice
Phase III: Tough questions
Article- and chapter-level metadata

Problem Statement

- New business models need to be supported
  - Publishers who want to sell article/chapter level content
  - A journal issue may consist of Open Access and paywall articles
  - Some but not all articles/chapters of a journal/book are available to the users

- Current Results in KBART
  - KBART lists send incorrect data, showing complete access to the journal and/or title.
  - Topic driven article level access creates an unwieldy KBART file.
  - Cannot distinguish Hybrid Open Access journals, only “Free” or “Paid” for the whole journal.
Problem statement:

- KBART files can be rather large. Especially for automation the adoption of XML might provide
- Should KBART recommend the use of XML as an optional file type (in addition to required tab-delimited text files)?

Pros

- Could be easier for Database ingestion
- Allows content providers flexibility in how they provide KBART if they choose this option

Cons

- KB providers already support txt and it works, why changing it?
- Does this really justify the additional burden for KBs?
Discussion

Feedback on proposed items presented

The need for Article/Chapter Level? Other formats (ie XML) of KBART?

Other suggestions for Phase III consideration

Relative priority of the proposed items

Ideas for addressing items?

Existing solutions that could be adopted as part of KBART?

Feedback about the process?
Ways you can get involved

Fill out the survey!

Contact us now to inform the scope of work

- kbart@niso.org

Respond during public feedback period

Join the standing committee

Join the interest group mailing list

- https://groups.niso.org/lists/kbart_interest/