KBART Phase III Update

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KBART Phase III

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8 work items

KBART Standing Committee working in sub-groups on a few items at a time

Entire process, including initial draft, feedback, and final draft for publication = ~ 17 mos.
Work item 1: Clarify current recommendations

KBART Phase III will clarify the recommendations in the existing Recommended Practice.

- Expanded information on what file(s) to create and what metadata to include
- Clarifications and additional information on data fields
- More examples of correct implementation, preferably for every field or recommendation
- More guidance on handling:
  - Gaps in coverage for serials
  - Supplements for serials (which may have a different title but share an ISSN)
  - Title changes and title histories for serials (with respect to publisher ability to provide this data)
  - Handling of items withdrawn/no longer available for purchase
Work Item 2: Endorsement process

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

For KBART Phase III, an overhaul of the endorsement process will be investigated:

- Varying levels of endorsement
- Endorsement of content providers vs. knowledge base vendors
- Branding and focus of program
- Role of KBART Registry in regard to how endorsement is communicated
Work Item 3: Additional content types

KBART Phase II only provides holdings data for serials and monographs.

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

KBART Phase III will support additional content types:

- Textual (blogs, transcripts, websites, manuscripts, datasets, etc.)
- Non-textual (audio, video, images, etc.)
Work Item 3: 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.

KBART Phase III will offer improved support for global content.
Work Item 4: File guide

Many 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.

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

KBART Phase III will investigate requesting a document from content providers that serves as a guide to their files.
Work item 5: Sample 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.
Work item 6: Investigate alternate formats

Content providers have requested that KBART support file formats other than tab-delimited text files.

In KBART Phase III, we plan to identify the issues content providers are trying to resolve through alternate file formats.

Possible alternative file formats: XML, JSON

Would need to be **in addition to** tab-delimited text files
Work item 6: Investigate alternate formats

Pros:

- Easier for knowledge base ingestion?
- Can handle multiple data elements (e.g. ISBNs, title histories)
- Better support for additional content types beyond journal and monograph
- XML, JSON can contain data about the file itself (e.g. collection name, date file created)
- Better support for APIs and KBART Automation

Cons:

- Current KB systems were developed to handle .txt files. Burden to develop support for other file types?
- Simplicity of .txt file and human-readability have been key to success of KBART thus far
Work item 7: Article/chapter-level data

New business models:

- Some publishers are interested in selling content at an article or chapter level, e.g. on a specific topic.
- Hybrid Open Access journals contain some articles that are open and some that are only available to subscribers.
- Some but not all articles/chapters of a journal/book are available to the users

Current results in KBART

- Holdings data necessarily incorrect, resulting in false positives or negatives for user.
- KBART files that attempt to present very granular holdings are unwieldy.
- “Free” vs. “Paid” content communicated at journal title level only.
Work item 7: Article/chapter-level data

KBART Phase III will create a roadmap for communication of article/chapter-level holdings data.

- What work needs to be done in the future to realize support for article/chapter-level data?
- What groups and technical experts may be needed to accomplish this task?

Support for article and chapter-level data is not solvable within KBART Phase III, but we want to lay the foundation for the consideration of this problem by multiple groups.
Work item 8: KBART mission

KBART was originally created to support accuracy in OpenURL linking.

KBART Phase II expanded KBART to address consortia holdings, open access content, and e-books and conference proceedings.

Now, KBART is being used in unintended ways not imagined when KBART was first drafted.

This is largely due to the success of KBART: its simplicity and wide adoption in the information supply chain.
Work item 8: KBART mission

In KBART Phase III, we want to be clear that KBART’s mission accurately reflects the modern usage of KBART along with the needs of KBART Automation and its focus on institutional-level holdings.

Today KBART files are used:

- To display library holdings in discovery systems, e-journal title lists, etc.
- To track library purchases in ERMs, for overlap analysis, to compare publisher packages, etc.
- To communicate to libraries and customers content available in publisher packages
- To communicate to libraries and institutions their available holdings
KBART Phase III: How can you get involved?

Take our short survey on: “What are the top three priorities that you are hoping that a revised KBART Recommended Practice would address?” at https://bit.ly/KBART2019

Or, contact us by email: kbart@niso.org

Join the interest group mailing list: https://groups.niso.org/lists/kbart_interest/

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