About me
Agenda

- Purpose and background
- Feature overview
- In practice
- Q&A

KBarT

- Purpose and background
- Feature overview
- In practice
- Q&A

TRANSFER
Acknowledgement

 Portions of this presentation draw from “Deep Dive into KBART,” originally presented as a KBART pre-conference at the NASIG 2016 Annual Conference by Sheri Meares, Marlene van Ballegooie, and Kristen Wilson

 https://www.slideshare.net/NASIG/deep-dive-into-kbart
KBART: Purpose and background
What is KBART?

Knowledge Bases and Related Tools

- Data and delivery recommended practice for the knowledge base supply chain

Iterations

- NISO Standing Committee: 2014-Present
- KBART Automation Working Group: 2017-Present

https://www.niso.org/standards-committees/kbart
A brief history of KBART

- James Culling’s 2007 UKSG Report
  - “Link Resolvers and the Serials Supply Chain”
- Aim: Develop a recommended practice to ensure the timely transfer of accurate data to knowledge bases and link resolver providers.
- Phase 1 – Completed in 2010
  - Main focus was on metadata for serials
- Phase 2 – Completed in 2014
  - Build on Phase 1 recommendations
  - Focus on e-book, Open Access and consortia metadata
Why KBART?

Data standard

Delivery standard

Improved access to e-resources
KBART: Feature overview
KBART ecosystem

KB Vendor

Creates KBART files to represent the content it sells

Library

Uses KB to direct users to content (and sometimes for other purposes)

Content provider

Harvests KBART files and ingests into knowledge base (KB)
How does OpenURL fit in?

OpenURL is a standard for encoding information about a resource into a URL.

- The OpenURL is generated by a “source”, like an abstracting and indexing database.

- It’s then passed to the link resolver, which compares the citation against a library’s holdings as defined in the KB.

- If the citation finds a match (or “target”) within the KB, then the user is passed on to the copy they can access.
### Data standard

<table>
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<th>print_identifier</th>
<th>online_identifier</th>
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*Note: The spreadsheet for this data has been split into three sections for readability, but represents a single .txt file.*
Delivery standard

Method of exchange

- Web page or file transfer protocol (FTP) – preferred
- Email – acceptable

Frequency of exchange

- Monthly – recommended
- Can set schedule based on frequency of changes

Filing naming

- [ProviderName][Region/Consortium][Package Name][YYYY-MM-DD].txt
# KBART Registry

## IOP Publishing

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<td>Contact Email</td>
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<tr>
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<td>Instructions</td>
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## JSTOR

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<tr>
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<td><a href="#">return to top</a></td>
</tr>
</tbody>
</table>

[https://sites.google.com/site/kbartregistry/](https://sites.google.com/site/kbartregistry/)
An introduction to KBART Automation

A new working group formed in 2017

Automation allows a content provider to send a customized KBART file directly to a vendor’s knowledge base.

The automated updates are done via API.

The RP is still a draft, but some vendors are already providing this service.

https://www.niso.org/standards-committees/kbart/kbart-automation
KBART: In practice
Why does KBART matter to librarians?

Good metadata benefits everyone!
KBART for e-resources management: North Carolina State University Libraries
# KBART for e-resources management: FOLIO

## Search & filter
- **jstor**

## Agreements
- Name: JSTOR Arts & Sciences I : hbz : 2017-10-09
- Name: JSTOR Arts & Sciences II Collection
- Name: JSTOR : Arts & Sciences III Collection : NK
- Name: JSTOR : Arts & Sciences IV Collection : NK
- Name: JSTOR : Arts & Sciences V Collection : NK
- Name: JSTOR : Arts & Sciences VI Collection : NK
- Name: JSTOR : Arts & Sciences X Collection : NK

## E-resources - agreement lines
- **American Antiquarian Society (AAS) Historical Periodicals Collection: Series 2 (1821-1837)**
  - Provider: EBSCO
  - Type: Package
  - Count: 1268
  - Coverage: -
Create your own KB: The Global Open Knowledgebase (GOKb)
Create your own KB: OCLC

Option 1: Add titles using a KBART file upload

Download a KBART-formatted template
1. Navigate to the collection you created, click on the name of your collection in the search results to open your collection.
2. Expand the Titles accordion.
3. Use the More Actions drop-down list to select Download. Alternatively, use the KBART template.

Open your .txt file as a KBART spreadsheet
To open in a spreadsheet editing application the .txt file you downloaded from the WorldShare interface:
1. Open the .txt file in Notepad or TextEdit.
2. Navigate to Edit > Select All and copy the entire selection.
3. Open Open Office, Microsoft Excel, or your preferred spreadsheet editing application.
4. Click in the first cell of the spreadsheet and then right click and paste. The content of the .txt file will populate the spreadsheet in KBART format.
5. Sometimes tab delimited text files get corrupted in the process of opening them. Check to make sure that the following columns are not reformatted and correct the formatting if needed:
   - Date columns
   - ISSN (print_identifier)
   - eISSN (online_identifier)
KBART: Q&A
Transfer: Purpose and background
What is Transfer?

Transfer Code of Practice

- Code of practice to ensure accessibility when a serial title transfers between publishers

Iterations

- UKSG initiative: 2006-2014
- NISO recommended practice: 2015-present

https://www.niso.org/standards-committees/transfer
Why Transfer?
Why Transfer?

- When is it happening?
- Who’s the new publisher?
- What will happen to the backfiles?
- How do I get access?
- What about my perpetual access rights?
- What else is changing?
Transfer:
Feature overview
# Code of Practice

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**RECEIVING PUBLISHER**

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**TRANSFER DETAILS**

| Effective Transfer Date | 2019-05-01 |
| First Volume | 22 |
| First Issue | 1 |
| First Date | 2019-05-01 |
| Special circumstances |      |

**PERPETUAL ACCESS**

| Digital Preservation | Koninklijke Bibliotheek Portico |
| Perpetual Access | Both Publishers will have archive |
| Created on | 2019-01-29T16:43:45 |
Submit Transfers

https://fr.slideshare.net/ISSNIC40
Transfer Alerting Service: Database

https://journaltransfer.issn.org/
Transfer Alerting Service: RSS Feed

https://journaltransfer.issn.org/rss

```xml
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Transfer Alerting Service: API

https://journaltransfer.issn.org/api

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Transfer:
In practice
Use the service!
(...and ask publishers to use it too)
Bring Transfer to you: NCSU Libraries

Transfers Tool
This tool updates the transfers report names, imports the relevant transfers into the LOCAL_WORKLIST table, adds the ISSNL to the LOCAL_WORKLIST table, and then checks for duplicates.

- Update TRANSFERS table recpub and transpub names
- Run TRANSFERS_QRY
- Insert ISSNFL
- Open LOCAL_WORKLIST table
- Check for duplicates
- Normalizes names so transfers table will have same name as used in LOCAL_SERSODATABASES table
- Appends transfers that are with Sage or have Sirsi P0s to the LOCAL_WORKLIST table
- Updates LOCAL_WORKLIST table with ISSNFL
- Opens LOCAL_WORKLIST table
- Checks LOCAL_WORKLIST table for duplicates
Bring Transfer to you: NCSU Libraries

Christenna's Package Changes

- Title Name: Alternative Law Journal
- Effective Date: 1/1/2017
- Owner: CH
- Source: UKSG ETAS search
- New Format: EPER
- New Title Number: 034726017
- New Package/Publisher: SAGE Complete A-Z List
- New Vendor: EBSCO
- Status: Completed

NOTE:
Subscribed Volume by E-Only or Combined subscriptions. For rights from former publisher, contact SAGE. Also, search the Keepers registry (http://thkeepers.org/)

Title not listed as part of SAGE Premier 2017 but we do have access; activated in SAGE A-Z list
Transfer: Q&A
Thanks!

kristen@indexdata.com