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Information and documentation — Presentation and identification of periodicals

Information et documentation — Présentation et identification des périodiques

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Contents

Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) see the following URL: www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 46, *Information and documentation*.

This second edition cancels and replaces the first edition (ISO 8:1977), which has been technically revised. The main changes compared to the previous edition are as follows:

— the scope has been expanded to include digital publishing, and recommendations applicable to all possible media.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

Periodicals, whatever their medium, play a critical role in the information society, and more specifically in the global information infrastructure. Citations to articles in scholarly journals, whether in print or in electronic journals, form the basis for much scholarly research. Popular trade magazines as well as newsletters are used by authors, researchers, and students of all ages. Search, discovery, and use of the wide range of today's periodicals require that they provide reliable identification and display of key information by following standardized principles and procedures.

When ISO/R 8-1954, the predecessor to ISO 8, was published, there was no digital publishing, nor were there identification standards such as ISSN or ISBN. The evolution of the publishing market in recent decades, the use of media other than paper, and the evolution of identification standards have made it necessary to revise ISO 8 to include recommendations applicable to all possible media.

This document is based in part on the first edition of ISO 8 for its recommendations pertaining to print periodicals, and on NISO RP-16-2013[1], for its recommendations concerning digital periodicals.

Information and documentation — Presentation and identification of periodicals

1 Scope

This document establishes the minimum characteristics required for the presentation and identification of periodicals including not only the obvious traditional elements that print periodicals typically display (e.g. title, ISSN, publisher, date), but also the "footprints" of periodicals published on digital dynamic media that enable them to be traced along the path of their history, such as changes of URL and publisher or content provider. Furthermore, this document provides information about persistent identifiers, using ISSN, and citation of periodicals (especially when published online or digitized and when titles have changed). It also makes specific recommendations for presentation and identification aspects of retrospective digitization of periodicals.

This document is applicable to a subcategory of continuing resources identifiable as "periodicals" (see Clause 3).

NOTE 1   For the purposes of this document, newspapers are not considered to be periodicals; therefore, specialized information relevant only to newspapers is not included.

This document does not specifically address or apply to books, including series of books, nor to content that is continuously updated such as loose-leaf services, databases, online reference works, and most websites.

NOTE 2   For information about series titles, see ISO 7275.

This document focuses only on elements of periodicals — printed, born-digital or retrospectively digitized — that relate to the presentation of title and supporting descriptive information, as well as practices related to title identification and content access over time. Therefore, this document is not concerned with the overall design of the periodical, except where that design affects the presentation of the title and has unintended consequences for resource discovery and access to earlier content. Neither is it concerned with the technical specifications for print, born-digital or digitized periodicals. The recommendations might not apply in all circumstances, and do not always accommodate certain artistic, technical or advertising considerations.

This document contains recommendations intended to enable editors and publishers of periodicals to identify and present key information in a form that will help users discover, cite and access their information over time and through any changes. This benefits all stakeholders of the periodical supply chain: publishers, content providers, authors, librarians, and researchers.

The recommendations address the following:

— display of periodical title(s) and other critical identifying information: issues, numbering systems, pagination, etc.;

— retention of title and citation information under which articles were originally published;

— display of title histories, i.e. changes in titles over time together with their dates of coverage;

— specification of appropriate metadata for digital periodicals;

   NOTE 3   This document concentrates on metadata elements which are applicable at the title-level and does not provide guidelines for complete article-level metadata.

— display of correct ISSN, including different ISSN for each format, language edition, and for changed titles;

— retention and display of vital publication information across the duration of a periodical, including: publisher names, numbering and dates, editors, editorial boards, and sponsoring organizations, and frequency of publication;

— graphic design that supports clarity and consistency of information, particularly title information and inclusion of information that allows easy access to all content;

— special considerations for retrospective digitization;

— usage of persistent identifiers for identification of periodical titles and articles;

— long-term preservation of periodical information across time.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 18, *Documentation — Contents list of periodicals*

ISO 215, *Documentation — Presentation of contributions to periodicals and other serials*

ISO 690, *Information and documentation — Guidelines for bibliographic references and citations to information resources*

ISO 999, *Information and documentation — Guidelines for the content, organization and presentation of indexes*

ISO 3297, *Information and documentation — International standard serial number (ISSN)*

ISO 8601, *Data elements and interchange formats — Information interchange — Representation of dates and times*

3 Terms, definitions and abbreviations

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

— ISO Online browsing platform: available at https://www.iso.org/obp

— IEC Electropedia: available at http://www.electropedia.org/

3.1 Types of serial publications

3.1.1
born digital serial
serial that from the outset has been created in digital form

Note 1 to entry: See also ISO 18461:2016, 2.5.7.

Note 2 to entry: Compare to retrospectively digitized content.

[SOURCE: ISO 5127:2017, 3.3.3.05, modified — The word "serial" has been added to the term and Note2 to entry has been added.]

3.1.2
continuing resource
publication, in any medium, that is issued over time with no predetermined conclusion and made available to the public

[SOURCE: ISO 5127:2017, 3.4.1.05]

3.1.3
integrating resource
publication, either finite or with no predetermined conclusion, that is added to or changed by updates that do not remain discrete and are integrated into the whole and made available to the public in any product form

[SOURCE: ISO 5127:2017, 3.4.1.06, modified — The example has been omitted.]

3.1.4
digital serial
serial that has been retrospectively digitized or born digital

3.1.5
electronic journal
e-journal
serial digital document, licensed or not, where searchable text is prevalent, and which can be seen in analogy to a print serial publication

[SOURCE: ISO 5127:2017, 3.3.3.35, modified — Notes to entry have been omitted.]

3.1.6
journal
periodical devoted to disseminating original research and commentary on current developments in a specific discipline, subdiscipline, field of study or profession, published over a period of time, or article by article online

EXAMPLE   Journal of Clinical Epidemiology.

3.1.7
periodical
serial generally characterized by variety of contents and contributors, both within one *issue* (3.3.9) of the publication and from one issue to another

Note 1 to entry: Each issue or part is usually composed of more than one intellectual contribution (article, essay, review, note, etc.); issues or parts are not substituted by updating issues or parts.

Note 2 to entry: The periodical has no predetermined conclusion.

[SOURCE: ISO 5127:2017, 3.4.1.28.02]

3.1.8
serial
publication in print or in non-print form, issued in successive parts, usually having numerical or chronological designations, and intended to be continued indefinitely, whatever its periodicity

Note 1 to entry: Serials can include periodicals, journals, newspapers, annuals, etc.

Note 2 to entry: Publications of limited duration (e.g. newsletters of events) are also considered serials.

[SOURCE: ISO 5127:2017, 3. 4.1.28.01]

3.1.9
special issue
issue (3.3.9) of a periodical focused on a certain topic and/or published with a *chronology* (3.3.1) outside of the official publication schedule

3.1.10
retrospectively digitized serial
serial that was not published in digital form initially but was converted to a digital medium at a later date

3.2 Content of periodicals

3.2.1
article
document in the form of an independent text forming a part of a publication

[SOURCE: ISO 5127:2017, 3.5.8.06]

3.2.2
back matter
material appearing at the end of the periodical, after the main articles

Note 1 to entry: This includes bibliography, index, endnotes, list of advertisers, reader response card, etc.

3.2.3
citation
reference in one document to another document or to part of it

[SOURCE: ISO 5127:2017, 3.5.8.16]

3.2.4
front matter
material that precedes the first page of text, before the main articles

Note 1 to entry: It includes the half title, frontispiece (illustration usually facing the first page or title page—more common in books), title page, contents list, letters to or from the editor, acknowledgements (or list of contributors), list of illustrations, list of tables, names of editors and editorial board members, and masthead information; may also include header information or journal leader, which usually includes the metadata concerning the periodical itself as well as metadata concerning the issue of the periodical and the individual article(s).

Note 2 to entry: See definition for preliminary pages ISO 5127:2017, 3.5.7.01, which includes front matter.

3.2.5
title page
page in a volume which contains full bibliographic information, normally found at the beginning of the publication/digitized document

Note 1 to entry: A title page found in *digital serials* (3.1.4) is usually on the homepage.

[SOURCE: ISO 5127:2017, 3.5.7.02, modified — Note 1 to entry has been replaced.]

3.3 Descriptive elements for periodicals

3.3.1
chronology
indication of the *date of publication* (3.3.3) or date of issue of a component of a multi-part resource, distinguishing it from other components of the same resource

EXAMPLE   October 2017.

Note 1 to entry: The chronology may reflect the date of coverage, publication, copyright, or printing.

Note 2 to entry: See also *enumeration* (3.3.6).

[SOURCE: ISO 20775:2009, 3.1.3, modified — An example and two notes to entry have been added.]

3.3.2
current title
name of a periodical that is presently in use

Note 1 to entry: See also *former title* (3.3.7) and *succeeding title* (3.3.11).

3.3.3
date of publication
date on which a work is published

[SOURCE: ISO 5127:2017, 3.3.4.10]

3.3.4
nominal date of publication
date of publication (3.3.3) as formally indicated in the publication

[SOURCE: ISO 5127:2017, 3.3.4.11]

3.3.5
actual date of publication
date on which a publication is actually available, particularly in respect to a given place or places

[SOURCE: ISO 5127:2017, 3.3.4.12]

3.3.6
enumeration
sequential numeric/alphabetic designation used by a publisher on a multipart or serial unit to identify the individual bibliographic or physical parts and to show the relationship of each part to the bibliographic unit as a whole

EXAMPLE 1   Volume 4, Number 10.

EXAMPLE 2   Volume 4, Issue 10.

Note 1 to entry: See also *chronology* (3.3.1).

[SOURCE: ISO 10324:1997, 3.22, modified — Example and note to entry have been added.]

3.3.7
former title
previous name of a periodical

Note 1 to entry: See also *current title* (3.3.2) and *succeeding title* (3.3.11).

3.3.8
frequency
scheduled period of release of issues of a periodical

EXAMPLE   Quarterly.

3.3.9
issue
one of the usually regularly appearing, self-contained and physically independent parts, marketed individually, of which a serial is constituted, usually bearing a numerical or chronological designation, e.g. issue number

[SOURCE: ISO 5127:2017, 3.4.1.28.17, modified — Notes to entry have been omitted; the definition has been modified to add an example of "chronological designation".]

3.3.10
running title
title, normally abridged, repeated on each text page within a serial

[SOURCE: ISO 5127:2017, 3.7.4.13, modified — Note 1 to entry has been omitted.]

3.3.11
succeeding title
title of a periodical that continues another title (in whole or in part), or which absorbs it (in whole or in part), or which has resulted from a split of the title or its merger with another title

Note 1 to entry: See also *current title* (3.3.2) and *former title* (3.3.7).

3.3.12
title
words or symbols at the head of a document that identify it and normally distinguish it from other documents

Note 1 to entry: May define as precisely as possible the special field of knowledge and activity dealt with in that periodical.

[SOURCE: ISO 5127:2017, 3.7.4.01, modified — Note 1 to entry has been replaced.]

3.3.13
volume
set of several issues of a periodical published over a certain period of time, usually the year; it can be identified by a numerical or chronological designation, i.e. volume number

3.4 Identifiers and locators

3.4.1
bar code
digital coding system showing an eye-visible linear array of rectangular marks of (possibly) varying width, height and vertical alignment, separated by spaces of (possibly) varying width in which the positioning and size of marks and spaces are used to code information to identify various types of material objects

[SOURCE: ISO 5127:2017, 3.2.5.11, modified — Note to entry has been omitted.]

3.4.2
Global Trade Item Number
GTIN
unique number from a standard code used internationally to identify products and packaging units

Note 1 to entry: See ISO 22742:2010, 3.25, 3.43 and 3.12; ISO/TS 16791:2014, 3.1.1.

Note 2 to entry: Up to 2009, this number was known as the "European article number" / EAN.

Note 3 to entry: Usually, the identifying number is incorporated in the *bar code* (3.4.1) and represented below the bar code.

[SOURCE: ISO 5127:2017, 3.2.5.12, modified — A third note to entry has been added.]

3.4.3
digital object identifier
DOI
standardized string for identifying a physical, digital, or abstract object and providing persistent resolution to the object or information about it

Note 1 to entry: *DOI* is specified in ISO 26324.

Note 2 to entry: The unqualified use of "DOI" alone can be ambiguous. Therefore, "DOI" is always used in conjunction with a specific noun.

[SOURCE: ISO 5127:2017, 3.2.5.17, modified — A second note to entry has been added.]

3.4.4
DOI name

string that specifies a unique object within the *DOI system* (3.4.6)

[SOURCE: ISO 26324:2012, 3.4, modified — Notes to entry have been omitted.]

3.4.5
DOI suffix

character string of any length chosen by the DOI registrant which shall be unique to the prefix element that precedes it

Note 1 to entry: The suffix can be a sequential number or it might incorporate an identifier generated from or based on another system used by the registrant, e.g. *ISSN* (3.4.7).

Note 2 to entry: Adapted from ISO 26324:2012, 4.1.3.

3.4.6
DOI system

social and technical infrastructure for the assignment and administration of *DOI names* (3.4.4) as identifiers in computer-readable form through assignment, resolution, referent description, administration, etc.

[SOURCE: ISO 26324:2012, 3.6]

3.4.7
International Standard Serial Number
ISSN

international standard code identifying a serial or *continuing resource* (3.1.2)

Note 1 to entry: See ISO 3297.

Note 2 to entry: Identifier is unique and defined for a specific medium, assigned by the ISSN Network.

[SOURCE: ISO 5127:2017, 3.2.5.03, modified — Notes to entry have been edited.]

3.4.8
ISSN-L

linking ISSN designated by the ISSN Network to enable collocation or linking among the different medium versions of a *continuing resource* (3.1.2)

Note 1 to entry: See ISO 3297.

[SOURCE: ISO 5127:2017, 3.2.5.04, modified — A note to entry has been added.]

3.4.9
ISSN Manual

document published by the ISSN Registration Authority which complements the standard by providing technical guidelines for its implementation

3.4.10
Uniform Resource Identifier
URI

compact sequence of characters that identifies an abstract or physical resource

[SOURCE: ISO 5127:2017, 3.1.9.20, modified — Note to entry has been omitted.]

3.4.11
Uniform Resource Locator
URL
mechanism for identifying resources on the internet such as webpages, by specifying the address of the resource and the access protocol used

[SOURCE: ISO 5127:2017, 3.1.9.21, modified — Note to entry has been omitted.]

3.4.12
Uniform Resource Name
URN
persistent, location-independent, resource identifier used for recognition of, and access to, characteristics of the resource or the resource itself

[SOURCE: ISO 5127:2017, 3.1.9.22]

3.5   Stakeholders

3.5.1
content provider
organization whose function is to commission, create, collect, validate, host, distribute and trade information in electronic form

[SOURCE: ISO 5127:2017, 3.2.3.22, modified — Note to entry has been omitted.]

3.5.2
ISSN Network
intergovernmental organization whose purpose is to identify serials and other *continuing resources* (3.1.2) globally

Note 1 to entry: See ISO 3297.

Note 2 to entry: It is administered by the designated ISO 3297 Registration Authority.

3.5.3
International Digital Publishing Forum
IDPF
trade association for the digital publishing industry, merged into *W3C* (3.5.6)

3.5.4
publisher
publishing house
organization or individual whose predominant activity is to commission, create, collect, validate, host and distribute information in printed and/or in electronic form

[SOURCE: ISO 5127:2017, 3.2.3.15, modified — Notes to entry have been omitted.]

3.5.5
sponsoring body
corporate body or organization that issued the item or that is associated with its authorship

[SOURCE: ISO 10161-1:2014, 3.6.160]

3.5.6
World Wide Web Consortium
W3C
international community that develops open standards to ensure the long-term growth of the Web

3.6 Formats and protocols

3.6.1
EPUB
distribution and interchange format standard for digital publications and documents based on Web Standards, which defines a means of representing, packaging and encoding structured and semantically enhanced Web content for distribution in a single-file format

[SOURCE: W3C]

3.6.2
Hypertext Markup Language
HTML
standardized system for tagging text files to achieve font, colour, graphic, and hyperlink effects on World Wide Web pages

3.6.3
Hypertext Transfer (or Transport) Protocol
HTTP
system of rules used to move data on the World Wide Web

3.6.4
article identifier
unique string assigned to a digital article for identification

3.6.5
Journal Article Tag Suite
JATS
set of XML elements and attributes for tagging journal articles and describes three article models

Note 1 to entry: It is an application of NISO Z39.96-2015[6].

3.6.6
link resolver
automated system based on the OpenURL protocol that converts citation metadata into one or more locations where the cited content may be found

3.6.7
OpenURL
standardized URL that incorporates context-sensitive information from a service request and uses a mediating *link resolver* (3.6.6) service to determine which of a number of potential targets best match the context of the request

Note 1 to entry: OpenURL is specified in the standard ANSI/NISO Z39.88.

[SOURCE: ISO 5127:2017, 3.2.5.23]

3.6.8
Extensible Markup Language
XML
markup language that encodes information in a way that is machine-processable as well as human-readable

[SOURCE: ISO 5127:2017, 3.1.9.19]

3.6.9
MAchine-Readable Cataloguing
MARC
family of format standards for the storage and exchange of bibliographic records and related information in machine-readable form

Note 1 to entry: All MARC standards conform to ISO 2709.

[SOURCE: ISO 25577:2017, 3.1]

3.6.10
MAchine Readable Cataloging eXtensible Markup Language
MARCXML
flexible framework or schema for working with MARC records in an XML environment

Note 1 to entry: See ISO 25577.

3.6.11
Metadata Object Description Standard
MODS
XML schema for a bibliographic element set, used for a variety of purposes including library applications

3.6.12
Namespace Identifier
NID
string of characters to identify an online resource within an identity space on the Internet for use with Uniform Resource Names (URNs)

3.6.13
namespace-specific string
NSS
mandatory string of ASCII characters that conforms to the URN syntax requirements and provides a name that is useful within the relevant documentation example

3.6.14
Dublin Core metadata
DC
set of 15 basic metadata elements and associated attributes for resource description in cross-disciplinary environments

Note 1 to entry: DC is specified in ISO 15836.

[SOURCE: ISO 5127:2017, 3.1.10.26.05]

3.6.15
ONline Information eXchange
ONIX
XML standard metadata format developed by EDItEUR for use primarily within the book trade

3.6.16
Portable Document Format
PDF
digital form for representing electronic documents to enable users to exchange and view electronic documents independent of the environment in which they were created or the environment in which they are viewed or printed

Note 1 to entry: See ISO 32000-1.

3.6.17
eXtensible Metadata Platform
XMP
file labelling technology that enables embedding metadata into the files themselves

3.7 Miscellaneous

3.7.1
digitization
process of converting analogue materials into digital form

[SOURCE: ISO 5127:2017, 3.1.1.47]

3.7.2
major title change
alterations to a periodical title that are significant enough to require a new ISSN assignment and bibliographic description, as determined by the *ISSN Manual* (3.4.9) and library cataloguing rules

3.7.3
metadata
data about other data, documents, or records that describes their content, context, structure, data format, provenance, and/or rights attached to them

Note 1 to entry: Typical metadata about a periodical includes its title, ISSN, date, publisher, and subject information.

[SOURCE: ISO 5127:2017, 3.1.10.26.01, modified — Note 1 to entry has been replaced.]

3.7.4
point
pt
unit of measure for font size, leading, and other items on a printed page

4 Identification of periodicals — International Standard Serial Number (ISSN)

Periodicals are identified worldwide via the assignment of an International Standard Serial Number and a key title. The ISSN is specified in ISO 3297 and it is an unambiguous numerical identifier that uniquely identifies a periodical title for searching, file matching, and other applications in libraries, information databases, the supply chain, rights management and other environments.

It is necessary to obtain a separate ISSN for each medium version of a periodical as defined by the ISSN Manual. When the same periodical or other continuing resource is produced in different media for which different ISSN and key titles are assigned, then the ISSN of all medium versions shall appear together on each version in a prominent location, each with additional distinguishing information. The Linking ISSN (ISSN-L) that collocates the medium versions shall also be displayed.

An ISSN shall consist of eight digits from the code points in the range U+0030 to U+0039 corresponding to Arabic numerals 0 to 9. The last digit or check digit (extreme right, low-order position) can also use the Latin capital letter X (code point U+0058). The check digit shall be calculated on a modulus 11 basis with weights 8 to 2, using X in lieu of 10 where 10 would occur as a check digit. The ISSN shall be constructed as two groups of four digits separated by a hyphen (U+002D). The characters that comprise an ISSN are defined as code points from ISO/IEC 10646.

Since ISSNs are likely to be used in the same context as codes designed for other purposes, when an ISSN is presented for human perception, it should, to avoid confusion, be preceded by the prefix ISSN (U+0047, U+0053, U+0053, U+004E) and a space (U+0020).

EXAMPLE   ISSN 2274-1011 (Print), ISSN 2265-6405 (Online), ISSN-L 2265-6405 (Linking ISSN).

Requirements for obtaining and using ISSN are found in Annex A.

5 Periodical title information

5.1 General provisions — Print and digital periodicals

The following provisions are applicable to all formats in which a periodical is published (e.g. print, digital/online, CD-ROM).

Provide the full title in a prominent, clear, and consistent manner everywhere it is possible to control the title presentation.

Use the same title for all formats of a periodical.

5.2 General provisions — Digital periodicals

5.2.1 The following provisions are particularly relevant and important to periodical content that has either been retrospectively digitized or where the title of a born-digital periodical has had a major change.

5.2.2 The title's history and its relationship to former titles shall be clearly stated on the periodical homepage. It is not acceptable practice to put all digital content under the current title as that would render many existing citations useless. Librarians, library catalogues and the ISSN Network may be excellent sources of information about title histories. (See also 5.4.2).

5.2.3 Periodical information at the title level (including title and former titles each with their associated ISSN, subtitle, enumeration and date range, name of current publisher, place of publication, frequency, and other identifiers when applicable) should be supplied on the periodical homepage or other suitable location. Periodical information at the issue level (including title, volume number, issue number, nominal date of publication, name of current publisher, and ISSN) should also be specified on the title page of each article.

5.2.4 All content from a former title(s) should be identified under the title in which it was originally made available, and not the current title. The original name and numbering of volumes and issues shall be preserved in the digital version.

5.2.5 The title in a citation shall be the title that was in use at the time the periodical content was originally made available. It is important for publishers or those responsible for retrospective digitization to retain the original title to preserve the integrity of citations to periodicals.

5.2.6 Any "Cite as" feature should be constructed to use the title, volume, issue, publication date and ISSN under which the content was originally published.

5.2.7 All outputs by the publisher or content provider (e.g. contents list alerts, information given to link resolvers, errata, corrigenda, retractions, and exporting or e-mailing citations or articles) should use the periodical title and other identifying citation information under which the content was originally published.

5.2.8 Metadata on the homepage for periodical and article data shall be both human and machine readable; that is, presented in such a way that applications can parse the metadata and identify the elements used.

5.2.9 Rights and access information shall be clearly indicated at the title and article level, as relevant, especially when the publisher or platform for digital content changes.

5.3 Title variants, parallel titles, running title, spine title, cover title, etc.

5.3.1 General

Variant titles, running titles, and cover titles, among others, shall be consistently presented in print periodicals. When a digital periodical is published in PDF format, the same principle of consistency applies since the PDF is a digital representation of the print pages. Title information can appear on a web page or other digital resource in a header bar, a homepage, or other parts of the site. The principle of consistency of presentation across digital resources applies where variants of a title are used.

The order of the titles shall not be changed from issue to issue.

5.3.2 Multilingual titles (parallel titles)

Parallel titles should be displayed with equal prominence for periodicals where all the texts are published in the different title languages or which arbitrarily use one or the other languages for each of the articles.

5.3.3 Running title

Periodicals that are represented in page format should carry the information necessary for rapid identification on every page or pair of even odd pages. This information should appear in the header or footer, and it shall be in the same position on each page. A running title may be abbreviated in accordance with the international standard for the abbreviation of titles of periodicals (see ISO 4).

The running title shall include where appropriate:

— the title of the periodical, abridged where applicable;

— the date, volume number and issue number;

— the page number;

— the page range of the article;

— the title of the article, abridged where applicable;

— the name of the authors or of the first author.

Other digital formats should include similar identifying information in the same position on each screen for human readability.

5.4 Title changes and title history

5.4.1 Title changes

Title changes should be justifiable, caused by a change in the publication's scope and/or topic. Title changes can require that a new ISSN be assigned by the ISSN Network. A new ISSN shall be assigned, and a corresponding new key title shall be established when the continuing resource undergoes a major change in title or other major changes as defined in the ISSN Manual. The rules spelled out in the ISSN Manual concerning major changes are intended to align with other bibliographical standards.

A title change should preferably be implemented at the beginning of a volume or a publication year.

Title changes should be clearly announced on the resource one or more issues preceding the change, or on the title's homepage.

The enumeration of the former title should be continued unless there is a need to sever all connection with the former title.

5.4.2 Title history

The title history should be specified consistently and visibly on the periodical irrespective of its medium. The full periodical title, publication date range, and ISSN for the current title and at least the immediately preceding and/or succeeding titles, as appropriate, should be included.

Alternatively, a consistent and visible reference can be made on the resource irrespective of the medium used for it to indicate where the title history may be found either on the resource itself or elsewhere.

See ISSN Manual (see Annex A).

5.5 Mergers and divisions of titles

5.5.1 Merger of titles where none of the former title/s are retained

If several periodicals are merged and if none of the former titles is retained, a new periodical is created, beginning with Volume 1.

5.5.2 Merger of titles where a former title is retained

If one of the former titles is retained, the numbering of the periodical should correspond with that of the title which is being continued.

5.5.3 Division of titles where the original title is not retained

If a serial is divided to form two or more periodicals, and if the original title is not retained, the numbering of the new titles shall begin with Volume 1.

5.5.4 Division of titles where the original title is retained

If the original title is kept for one of the periodicals, the numbering of its volumes shall be continued.

5.5.5 Notification of title changes through merger and/or division

All the changes specified in 5.5.1 to 5.5.4 shall be clearly announced, together with new ISSN if assigned, in one or more issues preceding the change, as well as in issues of the first volume or year. They shall be implemented at the beginning of a volume or year.

6 Enumeration and chronology systems

6.1 General

Numbering systems enable users to identify each issue of a periodical in a sequence and to distinguish one issue from another. This identification can consist of a numeric/alphabetic designation (e.g. volume, band, part, number), or a chronological designation (e.g. October 2017), or both. Inclusion of a date of publication, at a minimum, is essential.

6.2 Enumeration

Use an enumeration system that is sequential so that users can ascertain that they have all published issues.

Use the same form on all parts of the issue.

Keep identifying information (such as volume, issue, and page numbering) parallel, whenever possible, across all formats of a periodical; for example, when introducing a digital periodical for a previously print-only periodical, use the enumeration system of the print in the digital periodical.

Use the original enumeration and chronology scheme when posting content on the Web; do not retrospectively renumber existing content with a newly-imposed enumeration and chronology scheme. For digital content that is published by article before the issue is completed include identifying information for citation.

Volume numbering shall be continuous, in Arabic numerals, starting with volume 1. Use of Arabic numerals enables global sharing and understanding. Roman numerals shall not be used for new periodicals or for digital periodicals.

EXAMPLE 1   Volume 1

The first issue of a volume shall always be number 1 and numbers shall run in an unbroken sequence. Avoid "preliminary issue" or "number 0 issue".

EXAMPLE 2   Volume 1, Number 1

If there is any break in the sequence of numbers, this shall be stated in a prominent place in the following issue (duration of the break, volume number, number and date of the last issue published).

Each issue shall carry only one number except when it is necessary to combine several issues in a physical entity.

EXAMPLE 3   Nos. 7/8, July/August 2010

Avoid dual enumeration schemes prospectively on an issue or range of issues (e.g. original and new series volume numbering sequences, or repeated and continuous issue numbering sequences.) Label enumeration to make it clear whether numbers are VOLUME numbers or ISSUE numbers.

6.3   Chronology, dates or time periods

The year to which the volume refers shall be given in Arabic numerals.

If the periodical carries both numbering and chronology, they shall be presented adjacent on the cover or prominently stated elsewhere.

If the periodical is identified only by chronology, the statement should be complete (e.g. October 2017), avoiding abbreviations or years not completely spelled out. Wherever the date is given in an abbreviated form, it shall be written in accordance with the requirements of ISO 8601.

If the designation consists of a year and a number, make clear whether the sequence restarts every year or is continuous.

Clearly identify all date types. Include as appropriate, for example, volume publication dates, issue publication dates, and e-journal ahead of print dates. Include complete and unique dates for periodicals and issues, both in print and digital, to facilitate citing, retrieval, and inter-library loan.

Annuals or yearbooks shall clearly distinguish the coverage date of the report from publication date. Publication dates should be indicated at the bottom of the title page, verso of it, or clearly displayed on the publisher's website.

6.4   Supplements, special issues and indexes

Supplements and special issues should clearly display their relation to their parent publications, stating their own numbering if applicable. The word "supplement" or "special issue" shall clearly appear on its print or digital front cover, title page, and/or other prominent location. Monographic issues, special numbers and periodical supplements should be displayed as such.

A separately published index shall clearly indicate that it is an index and specify the coverage and time span.

6.5 Change of publication frequency

Changes made to publication frequency should be clearly announced on the resource one or more issues preceding the change, and/or on the title's homepage.

7 Information about the periodical

7.1 General

All periodicals, whether print, digital or digitized, should provide appropriate publication information as outlined below.

In a print periodical, publication information should be given by providing either a single detailed "about the periodical" or "periodical information" page on each issue covering the elements noted in the following subclauses.

Digitized periodicals should contain all the publication information of the original periodical, and additional information about the digitization process. This information should be provided on the homepage of the digitized periodical, or via an appropriate link.

Born-digital periodicals should contain the periodical's publication information as well. It may be provided in each issue (if there are issues), on the periodical homepage, in each article or another appropriate place within the periodical.

Alternatively, a consistent and clearly visible reference can be made in the resource irrespective of the medium used for it, giving appropriate links to a single location where the information can be found.

All the provisions in 7.2 to 7.4 are applicable to all formats of the periodical, including print and digital.

7.2 Purpose of publication information

Publication information plays several roles including:

— illustrating the history of a title retained over time and providing context to it;

— recording any individuals who were involved in the editorial process;

— recording practical information, such as the periodical's scope and frequency;

— providing information for decisions regarding legal deposit for national collections.

7.3 Periodical publication information

The periodical information should cover details about the following:

— editors;

— editorial board members (where applicable);

— ISSN (ISSN for print and digital and ISSN-L should all be displayed);

— other identifiers such as DOI and URN:ISSN;

— publishers' names;

— publishers' contact details;

— place or places of publication;

— sponsoring or responsible bodies;

— scope and purpose;

— frequency of publication; digital formats should include last change date whether continuing or integrating;

— publication start date and/or copyright dates;

— errata and retraction policies;

— pricing and subscriptions;

— rights (for example, copyright) and/or licensing information (for example, Creative Commons for Open Access and Copyright Clearance Center for subscription content).

If applicable, include information concerning ethics guidance, license information and peer review policy.

7.4 Periodical history

Information about the periodical shall be retained over the lifetime of the periodical to ensure the validity of citations, which relies upon the existence and traceability of a periodical's history. This information shall be retained even after a periodical has ceased publication. Publishers should provide a link or contact information for librarians to submit information or questions about the bibliographic history, publisher history, and/or the presentation of a title.

See title history (5.4.2).

8 Layout and pagination

8.1 Layout and typography

Uniformity of typography shall be used in similar issues of a periodical. A variety of sizes and weights and other typographic and editorial methods shall be used for distinguishing different issues of the periodical. The typography of articles, abstracts, and bibliographical identification shall follow the appropriate International Standards (e.g. ISO 690, ISO 999, and ISO 12083).

Typographic uniformity shall also be maintained from one article to another within the same article type and publication, a variety of sizes and weights being used within one article to emphasize the titles of different sections and their order of importance.

The contents list, abstracts, tables, figures, footnotes and bibliography for each article shall be set in sizes or weights of type different from those used for the rest of the text. For maximum legibility, no character, subscript or superscript shall be of a size less than 6 pt (2,5 mm).

Each article within an issue shall be in continuous pages. If discontinuity cannot be avoided, "To be continued on page X" shall follow the end of the first part of the article; and on the page of the second part "Continued from page X" shall appear. Should an article be continued in another issue, then the issue information shall also be included in the "to be continued" information.

In the choice of typefaces and their arrangement, ease of reading by methods other than direct viewing should be considered (automatic optical reading, microcopies, etc.).

For digital versions of articles and issues of periodicals, adaptive design should be introduced to all mobile devices. Ensure that distortion shall not happen at various levels of magnification when viewed on different types of screens.

8.2 Pagination

8.2.1 Periodicals presented in page-format

This subclause covers pagination of printed periodicals and digital periodicals presented in page-format.

The page numbering of the periodical shall continue through the whole volume or begin again with each issue commencing with page one.

Only Arabic numerals shall be used for page numbering. All pages which are not numbered, such as the first page of the text and, occasionally, the first page of articles, shall be included in the sequence of numbers. The covers of issues and the title pages of volumes need not be included.

Plates and fold-outs in printed periodicals shall be within the body of the text. The page numbers of plates and fold-outs should if possible be in the same sequence as that of the text.

The numbering of figures or tables printed on plates or fold-outs shall be included in the sequence of numbering of the figures or tables in the article.

Loose materials and enclosures in printed periodicals shall carry the identifying information listed in the running title, without page numbers. They shall be mentioned, and preferably enumerated in the contents list.

In printed periodicals, pages reserved for advertising matter shall be retained and included when the volume is bound, regardless of whether the pages are included in an issue's pagination sequence.

Advertising matter on the periodical websites and other mobile devices shall be clearly distinguished from the articles.

Those parts of an issue designated to be bound at the beginning of a volume, such as the title pages, shall not be included in the general pagination and may follow a different pagination scheme.

The index of the volume may have a separate sequence of page numbering. An index covering several volumes and all supplements shall have a separate sequence of page numbers.

8.2.2 Additional layouts of digital periodicals

Periodicals in HTML format, for example, are presented without running pagination, with each article presented as a single webpage. Pagination for an HTML article may be included in an associated PDF and listed in the descriptive metadata for the article.

For periodicals that have a continuous publication model, where articles are published digitally prior to publication in an issue, each article may begin with page "1".

For content where no pagination is assigned by the publisher (such as born-digital, online first, or preprints which are published digitally before publication in print or PDF), citation information should be captured and included in a locator element or identification tag. For example, in JATS tagging standard the citation information is in the <elocation-id> element, which replaces the start and end page elements for electronic-only publications.

8.3 Trimmed size for print periodicals

All issues of a periodical shall be of the same trimmed size, preferably ISO A series (see ISO 216). If a change is necessary, it shall be made at the beginning of a new volume.

8.4 Margins

The margins of all pages shall be consistent and shall maintain uniformity from one article or issue to another. Margins should accommodate scanning, copying and printing. If necessary, any changes shall be made at the beginning of a new volume.

9 Presentation of articles

The presentation of articles shall comply with ISO 215.

10 Accessing content

10.1 General

The ability to find the full text of a periodical's content is vital to the actual and potential readership, and to the ultimate dissemination of information that furthers scholarly research.

10.2 Contents list

A contents list shall be provided with each issue to facilitate browsing and current awareness. In a digital issue that comprises separate article files, the contents list shall indicate the articles that belong to the issue. The presentation of the contents list shall conform to ISO 18.

In a print issue, the contents list shall be on the first page of the issue immediately following the inside front cover.

The contents list shall indicate, for each article, and in the following sequence:

— the names of the authors;

— the complete title and all subtitles;

— the number of the first page and, if applicable, that of the last page, joined by a dash;

— for articles in instalments, the title shall be followed by "to be continued", "continued" or "concluded", as appropriate;

— for digital periodicals, if page numbers are not used, an article identifier may be listed instead of start page. See reference to JATS in 8.2.2.

The contents list shall also indicate, where applicable:

— headings which indicate that articles are grouped together (either by subject or by type of article);

— the theme title of a special issue, which shall be placed at the top of the contents list, preceding the list of articles, and shall be distinguished (by typeface, formatting, a label, etc.) from any group headings in the contents lists.

All headings such as "Abstracts", "New items", or "Conference", as distinct from original articles, shall be listed after original articles in the contents list. Each heading shall be referred to by its title as well as the number of the first page and, if applicable, by that of the last page, joined by a dash.

Information relating to articles or other headings listed in the contents list shall be separated by spaces between the lines.

Where appropriate, the contents list shall be given in more than one language.

10.3 Index

Print, digitized and born-digital periodicals should include annual, volume and/or issue level indexes.

Indexes in print periodicals shall comply with ISO 999, and whether annual or cumulated, shall be clearly announced on the covers of the issues which they accompany.