INTERNATIONAL STANDARD

ISO 8

Second edition
2019-04

Information and documentation — Presentation and identification of periodicals

Information et documentation — Présentation et identification des périodiques

This document is a preview generated by EVS

Reference number
ISO 8:2019(E)

© ISO 2019

This document is a preview generated by EVS

COPYRIGHT PROTECTED DOCUMENT

© ISO 2019

All rights reserved. Unless otherwise specified, or required in the context of its implementation, no part of this publication may be reproduced or utilized otherwise in any form or by any means, electronic or mechanical, including photocopying, or posting on the internet or an intranet, without prior written permission. Permission can be requested from either ISO at the address below or ISO's member body in the country of the requester.

ISO copyright office
CP 401 • Ch. de Blandonnet 8
CH-1214 Vernier, Geneva
Phone: +41 22 749 01 11
Fax: +41 22 749 09 47
Email: copyright@iso.org
Website: www.iso.org

Published in Switzerland

 © ISO 2019 – All rights reserved

Contents

Page

Foreword ..... **v**
Introduction ..... **vi**
1 Scope **1**
2 Normative references **2**
3 Terms, definitions and abbreviations **2**
4 Identification of periodicals — International Standard Serial Number (ISSN) **11**
5 Periodical title information **12**
5.1 General provisions — Print and digital periodicals 12
5.2 General provisions — Digital periodicals 12
5.3 Title variants, parallel titles, running title, spine title, cover title, etc. 13
5.3.1 General 13
5.3.2 Multilingual titles (parallel titles) 13
5.3.3 Running title 13
5.4 Title changes and title history 13
5.4.1 Title changes 13
5.4.2 Title history 14
5.5 Mergers and divisions of titles 14
5.5.1 Merger of titles where none of the former title/s are retained 14
5.5.2 Merger of titles where a former title is retained 14
5.5.3 Division of titles where the original title is not retained 14
5.5.4 Division of titles where the original title is retained 14
5.5.5 Notification of title changes through merger and/or division 14
6 Enumeration and chronology systems **14**
6.1 General 14
6.2 Enumeration 14
6.3 Chronology, dates or time periods 15
6.4 Supplements, special issues and indexes 15
6.5 Change of publication frequency 16
7 Information about the periodical **16**
7.1 General 16
7.2 Purpose of publication information 16
7.3 Periodical publication information 16
7.4 Periodical history 17
8 Layout and pagination **17**
8.1 Layout and typography 17
8.2 Pagination 18
8.2.1 Periodicals presented in page-format 18
8.2.2 Additional layouts of digital periodicals 18
8.3 Trimmed size for print periodicals 18
8.4 Margins 18
9 Presentation of articles **19**
10 Accessing content **19**
10.1 General 19
10.2 Contents list 19
10.3 Index 19
11 Citations **20**
12 Accessibility **20**
13 Retrospective digitization **20**
13.1 General provisions 20

This document is a preview generated by EVS

© ISO 2019 – All rights reserved

13.2 File formats applicable to retrospective preservation 21
13.2.1 General provisions 21
13.2.2 PDF/A 21
13.2.3 EPUB 21
13.3 Related standards 21
Annex A (normative) **Title identification and linking** **22**
Annex B (informative) **Metadata standards** **24**
Bibliography **25**

This document is a preview generated by EVS

 © ISO 2019 – All rights reserved

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.

This document is a preview generated by EVS

© ISO 2019 – All rights reserved

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.

This document is a preview generated by EVS

 © ISO 2019 – All rights reserved

Information and documentation — Presentation and identification of periodicals

This document is a preview generated by EVS

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;

© ISO 2019 – All rights reserved

— 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.]

This document is a preview generated by EVS

© ISO 2019 – All rights reserved