# WILEY

Understanding Customer Access Reports (CAR) & KBART Reports
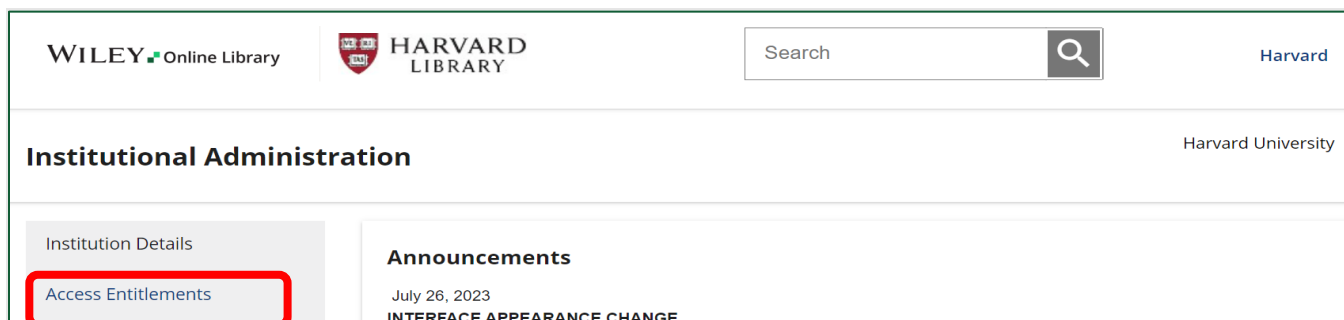
What is a Customer Access Report (CAR)?

The Customer Access Report (CAR) is a Wiley proprietary report. It shows the list of publication titles and contents to which the institution has access to on Wiley Online Library.

How to retrieve your Customer Access Report (CAR) from Wiley Online Library?

1. Login to Customer Administrator account.

2. Click on **Institutional Administration**.
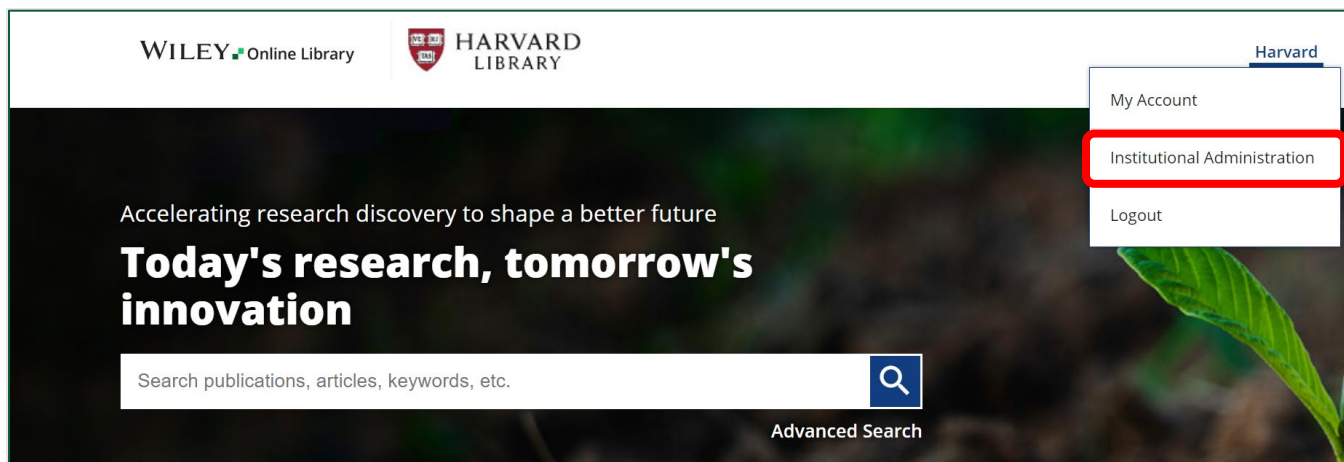
3. Click on **Access Entitlements**.

4. Enter the report recipient's email address in the box, then click on **CUSTOMER ACCESS REPORT**.

Customer access report

Generate a tab-separated text file of the content holdings to which your institution has access. The file will be delivered by email.

🛈 About the customer access report ˅

Select a recipient

⦿ | example@example.com | ◯ All administrators of this organization

CUSTOMER ACCESS REPORT

5. A .tsv file will be sent to the email address you have entered in above field.

How to open a .tsv file in Excel?

1. Save the .tsv file on your desktop.

2. Open a blank workbook in Excel.

3. Click on **Data** on the ribbon and select "**From Text/CSV**"
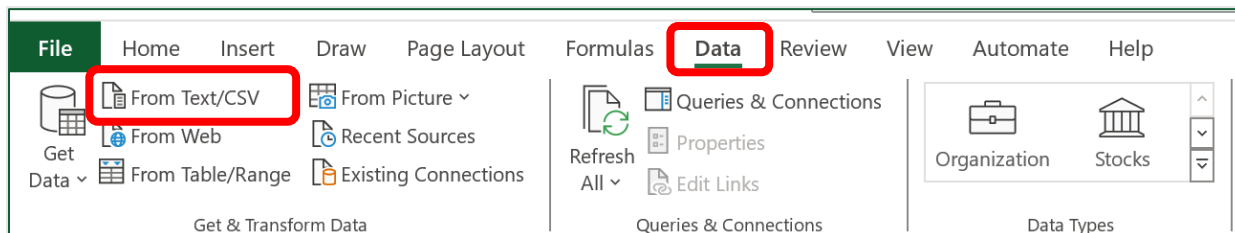
4. Select the .tsv file you want to open. Ensure that "**All Files**" is selected in the pop up window to locate your file.
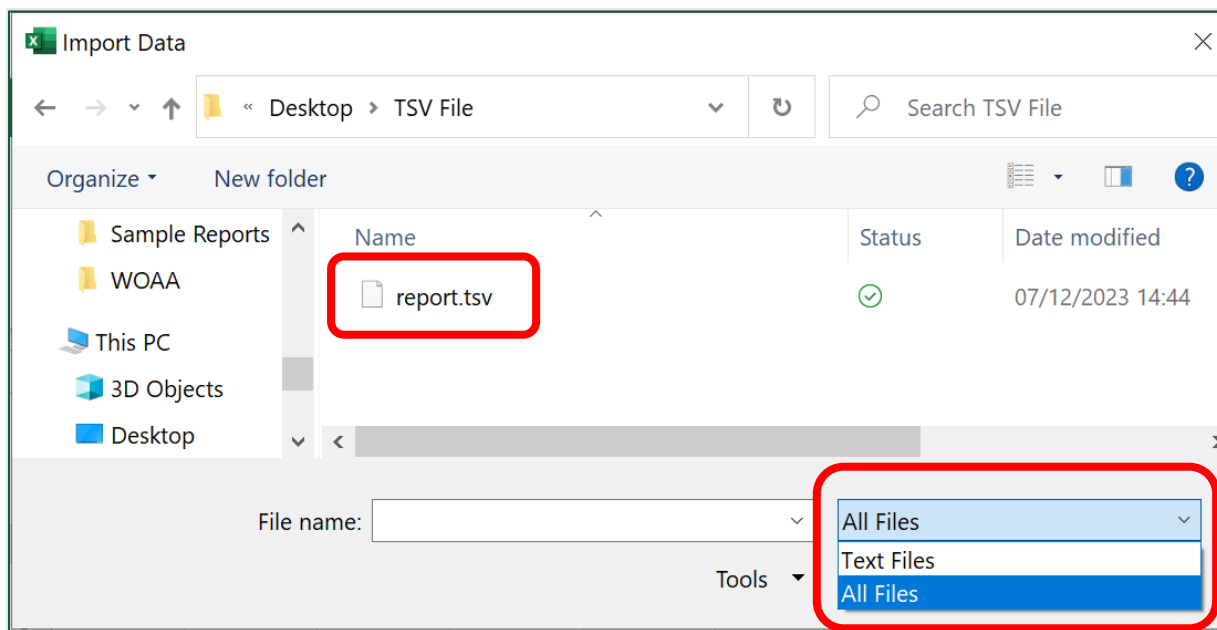
5. Click on "**Import**".

6. Click on "**Load**" in the next pop up window and the data should appear in the Excel worksheet.

Data description

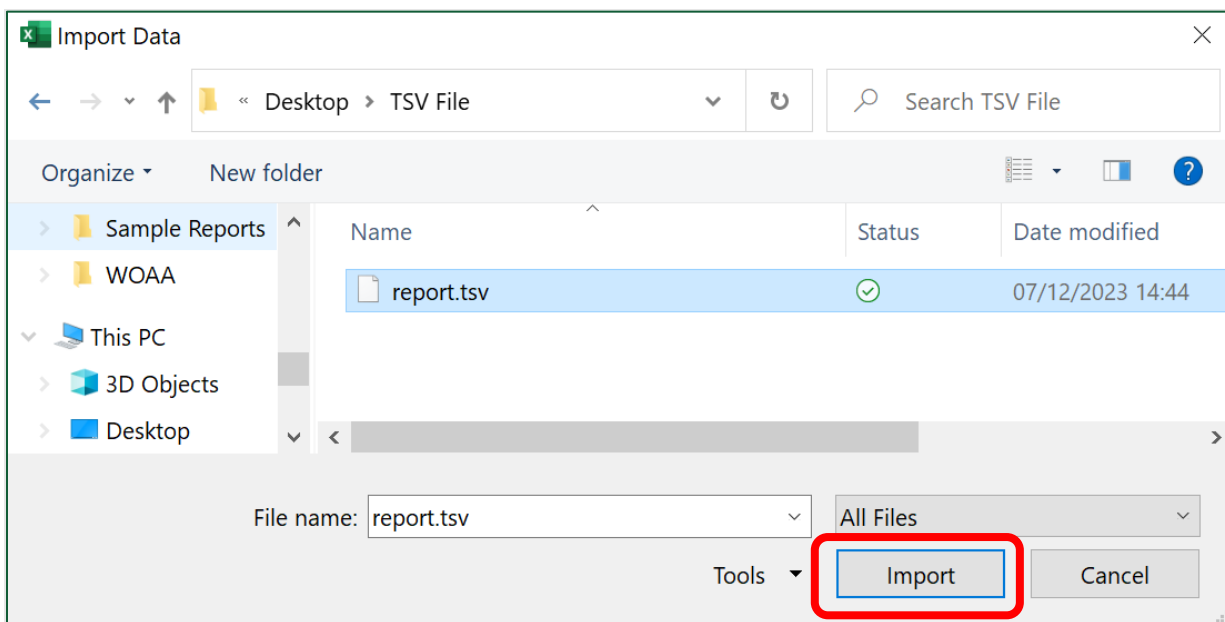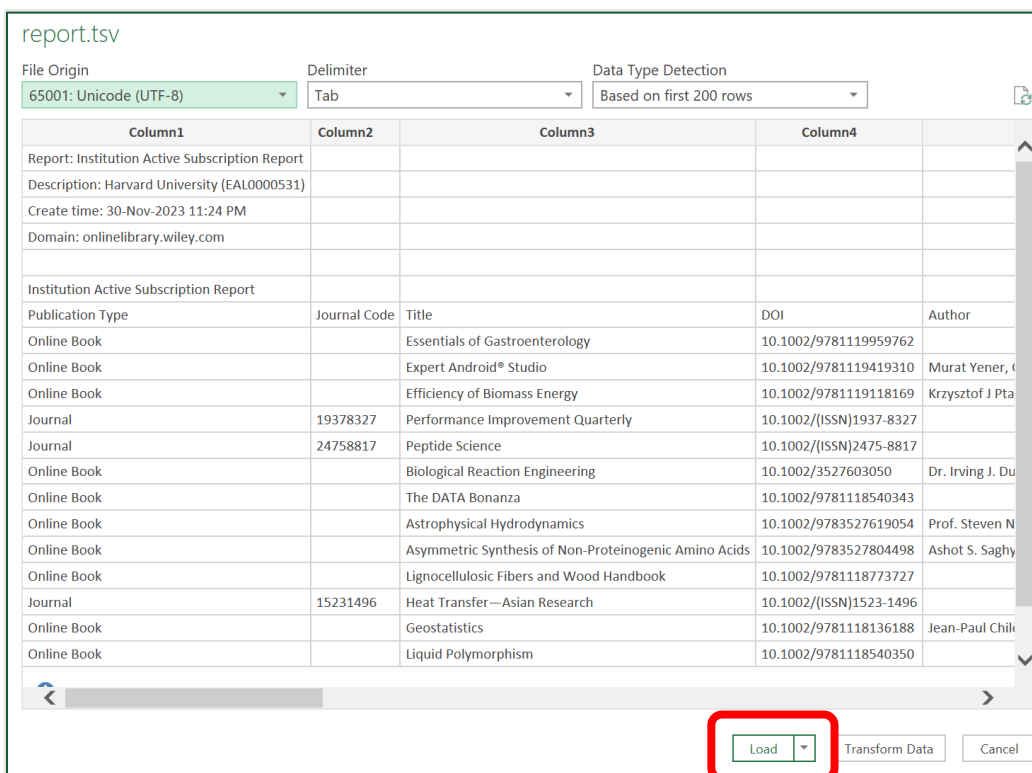| Online Publication Date	The date at which the journal is published online.
Journal Start Year	The year at which the *first* issue of the journal was published.
Journal End Year	The year at which the *last* issue of the journal was published.
Back File End Year	The last year of the back file which is available to purchase separately to the Front file. Back files run from the Start Year to the Back file End Year.
Front File Start Year	The first year of the front file which is available to license as part of a currently licensed subscription. Front files run from the Front file Start Year to the End Year.
Content Start Date	The date at which the first content is made available. Dates are in the Day/Month/Year format.
Content End Date	The date beyond which the content will not be available. Dates are in the Day/Month/Year sequence.
License Start Date	The date at which the title was invoiced/activated.
License End Date	The date at which the title access will not be available. Note: 31/12/2099 would normally mean that there is perpetual access to the title's content.

Examples

Title	Journal Start Year	Journal End Year	Back File End Year	Front File Start Year
	a	**b**	**c**	
Water and Environment Journal	1987	2023	1996	1997

a. **Journal Start and End Year** indicates when the first issue of the journal was published and the end year might suggest when it ceased publication or if it is still an ongoing publication.

b. **Back File End Year** indicates the last year of the back file which is available to purchase separately to the Front file. Back files run from the Start Year to the Back file End Year.

c. **Front File Start Year** indicates the first year of the front file which is available to license as part of a currently licensed subscription. Front files run from the Front file Start Year to the End Year.

In the above example, the Journal's first issue was published in 1987 and last issue was published in 2023. The Journal content starts from 1987 to 2023. Back File content starts from 1987 to 1996 and Front File contents starts from 1997.

d **e**

Content Start Date	Content End Date	License Start Date	License End Date
31/12/1986	30/01/2024	02/04/2008	31/12/2099

d. **Content Start and End Dates** indicates which publications are included in the license from given product.

e. **License Start and End Date (or Valid from and Valid to dates)** indicates when the customer access starts and ends.

In the above example, it is for all articles published between 31st December 1986 and 30th January 2024. The customer has perpetual access (until 2099) to these articles starting from 2nd April 2008.

Additional notes

- For Online Book and MRW titles, only the License Start and End dates will be displayed in the CAR.
- There is one title per row, with the earliest license start date and the latest license end date showing. Any gaps in licensed content in between these dates are not taken into consideration.
- Publications with expired licenses are not included in these reports.
- Individual volumes or issues that are not available within the run of a journal are not identified on this report.
- The report shows both titles which are part of core subscription holdings, and titles which are available as part of a licensed collection.
- Open Access titles and any other freely available titles may not appear in this report but will still be available to access at your institution.
- Only titles available on Wiley Online Library will appear on the reports.

What is KBART?

Knowledge Base and Related Tools (KBART) is a joint initiative that started exploring data problems with link resolvers, publishers and libraries. Commissioned by the National Information Standards Organization (NISO) and the United Kingdom Serials Group (UKSG), the KBART Working Group has established guidelines and updates for the timely exchange of metadata between content providers (like Wiley) and knowledge base providers (like Serials Solutions). Wiley officially endorses the KBART Recommended Practice (Phase I) and is committed to ongoing support of the KBART initiative. For the purposes of this FAQ, files that use the KBART standard, are called KBARTs or KBART files.

For access to our KBART files and collections, please visit this page:
https://onlinelibrary.wiley.com/library-info/resources/discovery/kbart2019

Why do institutions need them?

Though initially intended for OpenURL and link resolvers, KBARTs and KBs have other applications. For example, in the OCLC KB (called the WorldShare KB), users are able to select collections that reflect which sales models they have purchased. Then, once they have identified the appropriate collection, they can download records for all titles in that collection. This is also a tidier method for institutions to electronically manage their resources.

NOTE:
- **As opposed to the Wiley Customer Access Report (CAR), The KBART report only features one set of dates, representing institutional access to a title.**
- The report shows both titles which are part of core subscription holdings, and titles which are available as part of a licensed collection.
- The KBART output file (in tab separated format) is not read by default in Excel. When importing the file, be sure to click "Other files" from the file type field.
- Open Access titles and any other freely available titles may not appear in this report but will still be available to access at your institution. To view Open Access, Free and other KBART files, please visit the KBART page on Wiley Online Library below
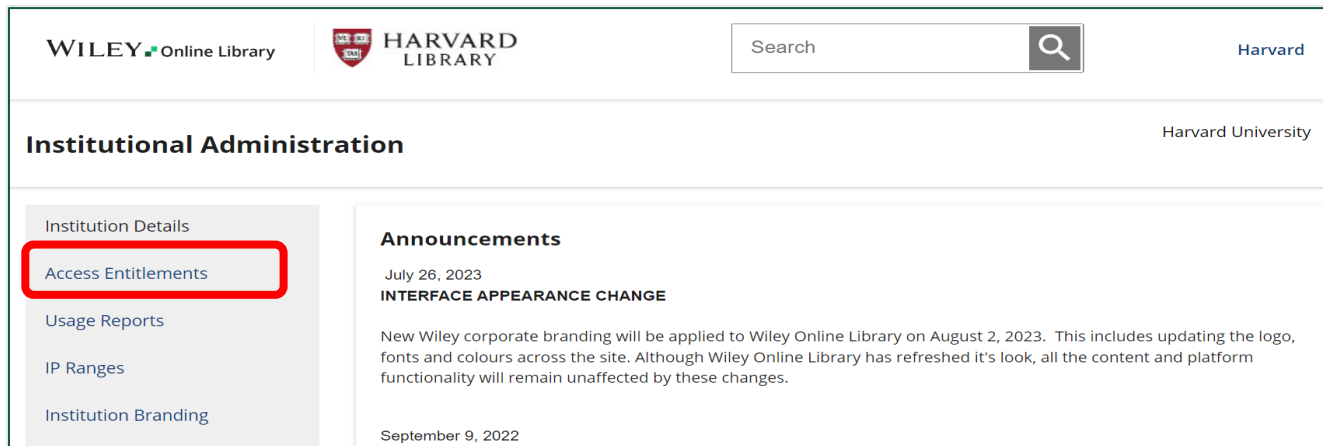- Only titles available on Wiley Online Library will appear on the reports.

For any questions on the report, please contact our Customer Service team at
www.wileycustomerhelp.com.

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How to retrieve your KBART file?

1. Login to Customer Administrator account.

2. Click on **Institutional Administration**.
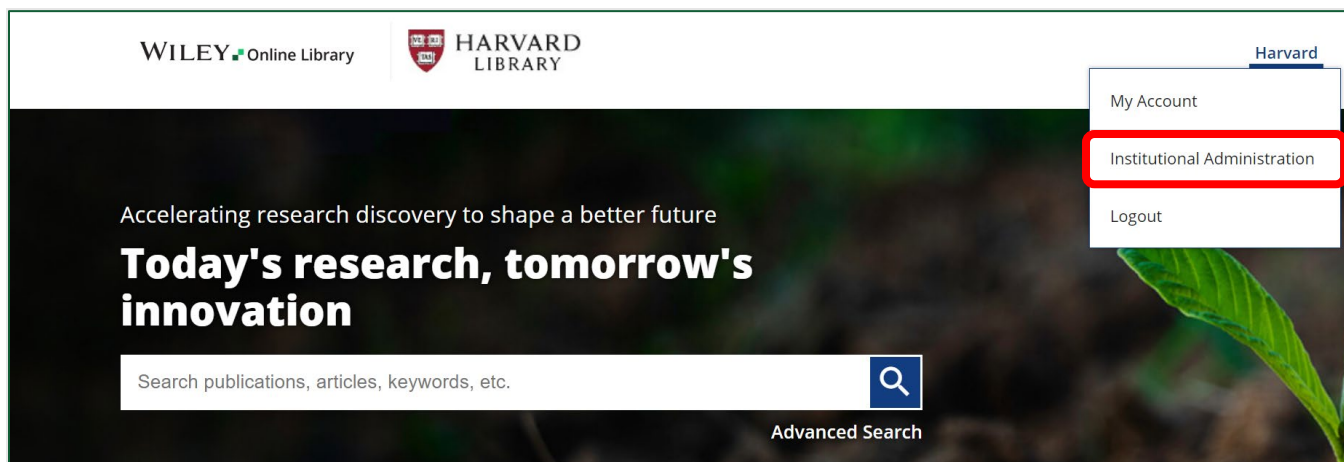
3. Click on **Access Entitlements**.

4. Scroll down to **Institutional KBART report** section.

5. Enter the report recipient's email address in the box, then click on **KBART FILE**.

6. To set up an automated KBART holdings feed with **Ex Libris, OCLC or TDNet**, please click on the "**Automated Library Holdings**" module on the menu to the left of the page.

MARC Records

Automated Library Holdings

Institutional KBART report

KBART is a NISO recommended practice that allows for a standardized method of displaying title lists. Now the uses for KBART span widely into electronic resource management, and content integration with vendor knowledgebases is critical. To make workflows easier for our customers, institutional holdings are available in KBART format. This file will be delivered by email.

To set up an automated KBART holdings feed with Ex Libris, OCLC or TDNet, please click the "Automated Library Holdings" module to the left for further instructions.

PLEASE NOTE: We are aware that some KBART metadata is in need of correcting. For journals originally published in print format only, and/or have had a title change, older versions have been merged into the current publication in our internal systems. This leads to duplicate ISSNs or DOIs, and lack of segmentation in the KBART reports. Wiley is aware of the issue. Currently there is no straightforward solution and so we advise are library partners not to raise additional tickets. Any changes will be communicated accordingly and we appreciate your patience as we look to resolve this issue.

ℹ About the Institutional KBART report ⌄

Select a recipient

⦿ | example@example.com | ◯ All administrators of this organization

KBART FILE

7. A .txt file will be sent to the email address.

8. You may click into the links to setup the integrations.

Institutional Administration

CSIRO Library Service

Institution Details

Access Entitlements

Usage Reports

IP Ranges

Institution Branding

Article Select Tokens

Manage Administrators

WOL Bookstore

MARC Records

Automated Library Holdings

Automated Library Holdings

Libraries using **OCLC WorldShare Collection Manager**, **Ex Libris Alma** and/or **Ex Libris SFX** can now configure data exchange tokens that grant access to their holding data via an Application Programming Interface (API).

PLEASE NOTE: Institutions looking for instant returns on holdings request may see an error message, until the feed is received by the vendor in the following week. The automated library holdings feed only runs once a week, over the weekend.

Create new token

Provider: [Ex Libris SFX ▾] **Generate token**

Active tokens

Provider:	Token	
Ex Libris Alma	80Z0EAPRGPXWXOI39PTJBTV61BGGSN	⧉ Copy
OCLC	8R8FAGXUJYDD6X0WSRKLCPBQLBRSSO	⧉ Copy

How to use tokens

How to set up integration with Ex Libris Alma.
How to set up integration with Ex Libris SFX.
How to set up integration with OCLC WorldCat.
Open an integration ticket with TDNet Support.

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How to set up integration with Ex Libris SFX
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Data description

Field Title	Description
publication_title	title of the described resource
print_identifier	if any: print ISSN for Journals, print ISBN for Books
online_identifier	electronic ISSN for Journals, electronic ISBN for Books
date_first_issue_online	year of first available issue for Journals
num_first_vol_online	number of the first available volume for Journals
num_first_issue_online	number of the first available issue for Journals
date_last_issue_online	year of last available issue for Journals (for both embargoed and inactive journals)
num_last_vol_online	number of the last available volume for Journals
num_last_issue_online	number of the last available issue for Journals
title_url	URL of the described resource
first_author	first author, for Books
title_id	identifier of the described resource
embargo_info	**Not implemented, even for embargoed journals**
coverage_depth	"fulltext"
notes	Used in order to provide complementary information which could not expressed in the other fields.
publisher_name	publisher name
publication_type	"serial" for Journals "monograph" for Books
date_monograph_published_print	print publication date for Books, if any
date_monograph_published_online	electronic publication date on Books
monograph_volume	**[Never used]**
monograph_edition	**[Never used]**
first_editor	name of the first editor for Books, if any
parent_publication_title_id	**[Never used]**
preceding_publication_title_id	**[Never used]**
access_type	F for Journals, Open Access & Open Access P for exclusive access Books

For journals, institutional access date ranges are found in the "date_first_issue_online" and "date_last_issue_online" data fields.

date_first_issue online	num_first _vol_onli ne	num_first _issue_on line	date_last_issue_ online	num_last _vol_onli ne	num_last _issue_on line
01/01/1968	1	1			
01/01/2015	24	1	01/11/2022	31	6
01/03/2013	2	1			
01/06/2019	1	1			
01/03/1995	1	1	01/12/2007	13	4

If the "date_last_issue_online" field for a title is empty, then content is available to present date.