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Information and documentation — Presentation and identification of periodicals

*Information et documentation — Présentation et identification des
périodiques*



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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.

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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;

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- 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 Note 2 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

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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".]