Providing Access to Electronic Journals: The Ohio University Experience

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Ohio University, as a member of OhioLINK and of the 20th century, has seen an exponential increase in electronic journals over the past two years. This exciting development has brought challenges for library staff. The challenges to our library span every department and have required making some key decisions about how to handle electronic journal subscriptions. Our focus at this point is on scholarly electronic journals.

Electronic Journals at Ohio University

The scholarly electronic journals which we subscribe to can be divided into several categories: those which we receive through OhioLINK, those which we buy in aggregate (e.g., JSTOR journals and Project MUSE journals), subscriptions to individual journals, and electronic journals which are free with a print subscription. These total in the hundreds, with by far the largest numbers coming from the first two divisions. A listing of our scholarly electronic journals is available at: http://www.library.ohiou.edu/electres/epub/epubjour.htm.

Acquisition of electronic journals

Although OhioLINK has done much of our electronic journals acquisitions for us by acquiring Academic Press and Elsevier Science collections, we also collect individual e-journal titles. Thus, the first hurdle is for a particular bibliographer to become aware of an electronic journal. This can be problematic because not all librarians spend time using the Internet in the course of their regular duties. For this reason, it is helpful if there is somebody in the library who has the time to hunt down e-journals and tell various bibliographers about them.

In our library, we've decided to give one person (Laura Hudson) the job of "electronic resources bibliographer." It is her duty to inform bibliographers of electronic journals in their subject area so that they can inform faculty liaisons and, perhaps, put them on Web-based subject guides. In actuality, because Laura has other duties as well, the task of locating electronic journals has fallen to an in

If Rumors Were Horses

Lots of news this month! The ebulliently fantastic Martha Whittaker <mwhitt@bouldernews.infi.net> is joining Academic Book Center as Vice President of Marketing effective June 1! She will be working out of her Denver office, with regular trips to Portland. Martha says she will keep the same email address as well as a new one at Academic — marthaw@acbc.com. And now we can even reach her at a toll-free number, 888-236-5168. Congratulations, Martha!

Jim Retig — that fabulous reference reviewer, among other things — will become University Librarian at the University of Richmond in Richmond, Virginia, on June 10. Congratulations, Jim!

Did we tell you that Arnold Hirshon (Vice Provost for Information Resources, Lehigh University) has been named the recipient of the Hugh Atkinson Memorial Award for 1998? The award, $2,000 and a citation, recognizes outstanding accomplishments of an academic librarian who has worked in the areas of library automation or library management, and has made contributions (including risk-taking) towards the improvement of library services, or to library development or research. The Faxon Company also provides a gold giraffe pin from Tiffany's, symbolizing the "sticking-your-neck-out" aspect of the award, for the winner. The award is jointly

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Access to Electronic Journals
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formal group of people which includes the Collection Development Coordinator, the electronic resources bibliographer, and our de facto Webmaster. Finding e-journals throughout the disciplines is easier now that there are so many listings, such as the one put out by Faxon, which lists electronic versions of paper journals. Librarians have also compiled many useful lists of electronic journals which we rely upon heavily.

Acquisition procedures are complicated by the electronic format, especially in a mid-sized library such as ours. Any holes in the communication process become painfully apparent. One particular journal we ordered involved a password that got lost in space: it became clear at that point that we had no procedure for acquiring passwords and giving them to bibliographers.

Cataloging the collection

The cataloging of electronic journals has been discussed at length and some standards have been proposed. However, there are issues which need to be dealt with on an individual library basis.

To facilitate consistency, an "Electronic Journals Task Force" composed of two catalogers, one reference librarian who is also the electronic resources bibliographer, and the Coordinator for Collections Development, was created at Ohio University to pinpoint and deal with these issues.

The task force was meant as a policy-writing task force, which would be dissolved once the policy was established. However, more issues, and related issues, keep coming up as our e-collections grow, so we have become an ad hoc committee.

Questions the task force has dealt with include:

✔ When is an electronic journal worth cataloging? For now the answer is when we pay for it, either directly, indirectly as part of a print subscription, or through the OhioLINK consortium. However, we are discussing cataloging important free Web journals as time allows.

✔ When is an electronic journal really a whole different journal and not simply a new format? We're still grappling with this one. Many electronic journals have value-added features such as IOP's hypercite or Springer-Verlag's electronic discussion forums. Some journals contain articles which aren't available in the paper version. At what point should we consider them entirely different entities, and does it matter?

✔ Should we have two separate records in the catalog for e-journals and paper journals (which I am told is "pure" cataloging), or would it be simpler for the patron to just see all formats on a single record (which I am told is, technically, fludging)? We opted for the second option because the experience of public service librarians told us that our patrons tend to look only at the first record for an item. Our theory is that we are in the business of helping people find information, not creating a gorgeous online catalog.

✔ When we download records from OCLC, many come with URLs in the 856 field which contain information other than an electronic copy, for instance, publisher's home pages. Should we keep this URL or provide URLs strictly for e-text? We opted for the more lenient approach, and keep the URLs if we are able to access the material. That is, we won't keep the URL if the material is subscription-only and we do not subscribe. This easy check cuts down on potential training problems which a more complex policy might involve.

✔ What should the call number be for electronic resources? Right now it says "electronic resource," but the task force members agree that assigning a basic LC call number would be superior because it would facilitate statistical analysis of our collection. This is apparently a decision which involves going through the necessary channels at OhioLINK, and not one which we can make on our own.

✔ What should the location field say? We have several location options based upon access level — OhioLINK only, OU Athens only, Ohio University which are linked to descriptions of these terms.

✔ Do we maintain an electronic journals Web page even though we are cataloging the journals? Yes, we have decided to do so. As one astute audience member said during our talk: cataloging e-journals is very useful, but a Web listing creates a virtual stacks which people can browse. We also encourage subject bibliographers to list electronic journals on their individual Web-based subject guides. However, the breadth of Internet experience in the library means that we cannot rely on this method alone.

Technology issues

Providing access to electronic journals in the library raises some key issues in terms of library technology. Any weaknesses in hardware or technical support will cause great headaches for both library patrons and public service staff. It is important to have enough hardware of suitable quality for viewing and printing electronic journals. Many e-journals are using Adobe Acrobat PDF files, so dot matrix printers are not suitable for printing.

Slow servers and too many users at the publisher's end mean frustrated patrons at the library end, and slow computers will only compound these problems. It is important to try an e-journal on patron stations, not just desktop stations, which tend to be of higher quality.

Software is also an issue — we have had to decide how many helper applications we are willing to support, and have decided that, in general, we just can't provide access to e-journals which use anything other than HTML or PDF. Although there are some important e-journals on the market using other software applications, each application causes problems when running on a network, which means headaches for both systems support people and public service people. IP validation or the publisher end is important — without it we have to either write a CGI script to automatically pass the password to the publisher's page based on IP address, or we have to give the password out to our patrons, which involves finding a good method for communicating this information to patrons without communicating it to non-patrons. We have not made the decision to simply quit providing access to electronic publications which do not provide IP validation, but we've certainly discussed the possibility. Of course, the ideal solution would be IP validation with a password option for valid users who are off-campus, but we have not been provided this level of access as of yet.

The bottom line is that everything must be tested several times before it is made available, and appropriate equipment and technical support must be made available. Electronic journals (and other electronic library tools) seem relatively simple and seamless only when a lot of work is put into them behind the scenes.

Communication

Communication is key whenever implementing a new service. In the case of electronic journals it becomes crucial. Public service people need to keep in touch with systems support people about what will work and what won't. For instance, we had a situation where Adobe Acrobat was not loading properly. Somebody in the system area found a solution which involved opening Acrobat manually. For us in public service, this was not a solution at all because it complicated our patron's lives, and we had to let our systems staff know.

As we mentioned, public service people also need to communicate with acquisitions and cataloging staff. This new format shows the holes in our current communications procedures. We've dealt with this, although not always entirely effectively, by assigning one

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<http://www.against-the-grain.com>
person in the Reference Department and one
person in the Cataloging Department to be con-
tact points for their respective areas.

External communication is also important.
We need to communicate with publishers and
vendors about new content. JSTOR, with their
“content update” messages, have been leaders in
helping libraries face this hurdle. We need to
improve our communications with faculty and
students, as well as with our departmental liai-
sors. Because faculty will be primary users of
many electronic journals, communication about
this service can improve library-faculty relations
greatly. Explaining to faculty why there are speed
issues can head off grumbling and help them to
understand that this new technology is still just
— new. Our favorite thing to say to a dis-
gruntled patron waiting for their e-journal article
to load or print is — “Well, it’s faster than interli-
brary loan” (cheerful grin). If they are in the
library, we then offer to wait for the printout
and send it to them via inter campus mail. One thing
I have encountered is the belief that we are can-
celling print subscriptions because we are spend-
ing our money on electronic subscriptions. Of
course, from our point of view this is not the case.

Proactive communication can offset the damage
done by this belief.

Training
Okay, confession time: we made a mistake
which we shall not make again for a long, long
time. We brought up a new service without train-
ing all of our public service staff. This really comes
back to communication. Because we in reference
all work within shouting distance of each other,
we tend to teach each other how to use new things
and forget that other departments are more iso-
lated, even though they are just downstairs.
Electronic journals seem simple, and they should be.
But when you are helping a patron, it is frustrat-
 ing to be using something you have never seen
before, and infuriating when something goes
wrong. So the lesson is: train your own staff first!
This preliminary training has the added benefit
of exposing technical problems, so that they can be
solved before making the service public. It is
also good public relations to offer training for
faculty, staff and students, and can decrease the
amount of time public services staff spend run-
ning around helping people with simple electronic
journals queries.

Collection development
Although collection development policies are
traditionally for subject areas and not formats, a
policy on electronic text collecting can be help-
ful for bibliographers who are uncomfortable
making the transition from print to electronic for-
mats. The policy is a place to mention pertinent
concerns unique to electronic formats, such as
computer systems requirements, whether or not
to maintain a print subscription, and evaluating
prices and licensing agreements.

Statistics are often used for collection develop-
ment purposes, and it has always been diffi-
cult to gather statistics for journals because, at
least at the places where I’ve worked, journals
don’t circulate. The possibilities for gathering sta-
tistics for e-journals are much greater, because
Web servers keep these statistics easily. At the
time that we gave this talk, most vendors and pub-
lishers were not providing statistics. Now, half a
year later, it seems that most are providing them.
The challenge is to get all of these various statistics
from various vendors with various sorts of
systems into a common format which is useful
for analysis. We’ve developed an informal com-
mmittee to look at statistics for both Web-based
databases and e-journals in order to come up with
some general guidelines as to what kind of infor-
mation we need. Again, on our end it would help
to give e-journals LC call numbers so that we can
analyze our own collections accurately.

License agreements
The question of license agreements reigns
large when discussing access to e-journals. From
a public service perspective, the most important
issue is who can access the journal and how. If
they need to type in a password, we need to find
a way of getting that password to the patron in a
way which is as easy as possible. If the company
can do IP address validation, we need to be able
to figure out what our IP addresses actually are
and who is to be included and excluded — it gets
complicated on a large campus with six
branches, a hospital, an affiliated hotel, an affili-
ated regional freenet ... and the IP addresses
were not apparently allocated in simple chunks
but rather in some sort of convoluted manner so
that the library includes several numerical ranges,
with exceptions within the ranges. Because we
want users who are not within the correct IP range
to have some sort of an explanation rather than a
publisher-allocated “error!” message, we main-
tain our own CGI scripts which check IP address
and either pass the user to the journal or to a page
containing a gentle “access denied” message with
an explanation and the telephone number for the
reference desk.

Providing access: a public services
viewpoint
When you work at the reference desk help-
ing patrons for two to four hours of your day, it
colors the way you look at things. E-journals are,
theoretically, very exciting for reasons which we
all know: greater access from more locations, pos-
sibilities for inter-linking and intra-linking, the
possibility for supplementary materials of sorts
we perhaps haven’t even imagined. And even with
the daily doings of handling new policy, fixing
technical problems, sorting out li-
cense agreements, and hunting down passwords
is intellectually rewarding. What is not reward-
ing is soothing a frustrated patron who has just
waited fifteen minutes for a journal article to load
only to have their computer freeze, or watching
an undergraduate’s eyes glaze over as you de-
scribe the steps to get the article they need, or
explaining to a professor in another building why
they could get to this journal yesterday, but can’t
today. Clearly, research is a complicated process.
We would not be doing our patrons any favors if
we simplify the process to the point of losing
functionality. But neither should our public have
to deal with computers that freeze, ridiculously
slow servers, an untrained staff, or inconsistent
cataloging records. The public should not
need to know how to use six helper applications
in order to access an article. From a public ser-
vice perspective, patrons should not be used as
test cases, and to treat them as such will put the
reputation of the library at risk. Clearly, libraries
need to test new products extensively, support
them appropriately, train staff members, work
with publishers and vendors to find ways of im-
serting the article, and write policies to deal
with the issues that electronic journals create
— preferably before providing extensive access in
a public setting.

NB: This paper is based on a talk given
at the 1997 Charleston Conference.

Rumors
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Hmmnn ... In Australia, government docu-
ments aren’t automatically in the public do-
main. Yo! should check out what Lloyd Rich
says in this issue about the United States and
public domain documents, see this issue, p. 46

Whatever happened to Glenn Jaeger? Well,
the former Vice President of Alfred Jae-
ger, Inc. and manager of The Faxon Com-
pany has started his own business with part-
tner Tracey Clarke (also formerly of Faxon)
called Absolute Backorder Service, Inc.
(that’s Absolute with an “e” - not the vodka).
Absolute is a backorder fulfillment service
which supplies periodicals to universities
worldwide. Glenn is also the new father of a
baby girl! With a new business and a new addi-
tion to the family, you can see he is going to
continue to be pretty busy! If you want to find
out more about Absolute, visit their website

Quite a few of you are visiting the ATG
homepage! A recent visitor was Marseille
(Marcy) Pride (Collection Management/In-
terlibrary Loan, University of Maryland, Bal-
timore County, 1000 Hilltop Circle, Baltimore,
MD 21201; phone: (410) 455-2345; fax: (410)
455-1061 <pride@umbc.edu>) who was re-
questing information on this year’s Charles-
ton Conference!

I plan to be there! Barbara Moran (Dean
and Professor, School of Information and Li-
brary Science, UNC-Chapel Hill) sends word
that Beta Phi Mu is planning to resume its annual lec-
ture series at this summer’s ALA and the first
speaker in the series is Dr. Edward G. Holley
speaking on the topic of “Librarianship and
Scholarship through Five Decades: A Personal
View,” on Sunday, June 28th, in the Dolly
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