And They Were There -- Reports of Meetings -- North Carolina Serials Conference, and North American Serials Interest Group

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And They Were There

Reports of Meetings — North Carolina Serials Conference, and North American Serials Interest Group

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Sponsored by North Carolina Central University’s School of Library and Information Science, the theme of this year’s conference was “Opening Pandora’s Box: Managing the Chaos of Serials Resources.” Evelyn Council of Fayetteville State University’s Library and Robert Ballard of North Carolina Central University’s School of Library and Information Science welcomed the serialists and introduced the keynote speaker.

Donald King, Research Professor at the University of Pittsburgh’s School of Information Sciences, gave the keynote on “The Future of Scholarly Journals and the Important Role of Libraries in This Future.” Based on decades of statistical research, King addressed the issues of serials costs in comparison with print costs, use metrics, and the future of author-payment Open Access models. King found that vendor statistics for e-resources at the University of Pittsburgh overcounted usage, but not too severely, and that, taking into account the costs for binding and maintenance of print serials, the cost per reading for e-resources was significantly less than that the cost per reading of print serials. King speculated that the author-payment method of funding Open Access journals may face challenges because it has not previously worked well. He predicted that journals will become smaller and that groups of journals with homogenous contents will remain. In addition, he forecasted that libraries will pool together to share print copies of journals as more issues (and back-issues) become available online.

Six Round Table Discussions followed the keynote. The “Creative Staffing Solutions” table, led by Eleanor Cook of Appalachian State University, discussed supporting staff and redistributing duties when staff members leave, as well as mixing Public Service responsibilities with Technical Services responsibilities for all staff. Carol Nicholson of UNC-Chapel Hill headed the “Dealing With Changes” Table, whose participants discussed situations to avoid, such as poor communication and rash decisions, as well as best practices such as open communication and empowering staff. The “Electronic Resource Management” table, headed by Merrill Smith, of EBSCO Subscription Services, discussed the range of problems faced by electronic resources managers. At the “Fixing Broken Links” table, led by Joyce Tenney of the University of Maryland, Baltimore County, participants concluded that commercial link resolvers are a good solution to broken link problems. Tim Bucknall, of UNC-Greensboro, headed the “Open Access Journal” table, which concluded that larger institutions will include open access journals in their link resolver databases and that faculty will have to be persuaded to publish in open access journals. Finally, the “Usage Statistics” table, led by Nancy Newsome of Western Carolina University, discussed the potential importance of usage statistics in cancellation decisions and the value of COUNTER-compliant statistics. This table also had a brief discussion about different vendors’ pricing models for different serial formats.

Following the Round Table discussions, David Goldsmith of North Carolina State University (NCSU) presented “Envision a Solution to the Online Serials Management Mess: NISO/EDITEUR’s Development of an International Standard for Online Serials Subscription Data.” Goldsmith described the combined efforts of the National Information Standards Organization (NISO) and EDITEUR (an international group created to facilitate Electronic Data Interchange) to establish a new XML schema, the Serials Online Holding (SOH) schema. This schema will be based on the Online Information eXchange (ONIX) schema for communicating serial subscription information between Publication Access Management Services (PAMS), such as Serials Solutions, and libraries.

Day two began with a panel presentation opened by panelist and moderator, Janet L. Flowers, of UNC-Chapel Hill. Aisha Harvey, of Duke University, presented an overview of the chaotic introduction of electronic resources and electronic resource management systems into serials acquisitions. Janet Flowers followed this overview with a description of survey results that she gathered from the Acqnet list-server regarding changes in library organization to cope with the new duties in acquisitions. Flowers found that acquisitions staff members have a great number of duties, but they accomplish a great deal. In addition, she explored the advantages and disadvantages of consolidating and decentralizing responsibilities necessary for acquiring electronic resources. Survey participants reported that retirements, different library directors, and unions affect the library’s organization to cope with the added responsibilities created by e-resources. Flowers concluded that libraries will continue to process collections of both electronic and print resources into the foreseeable future.

The next panelist, Mike Phillips of Wiley, presented effects of e-resources upon a vendor. These effects ranged from having to gain more knowledge about library clients, to the increased legal expertise needed for creating license agreements, to the development of different pricing models for different products and services. Suzanne BeDell, of ProQuest, also speaking from the vendor’s perspective, remarked that the relationship between library and vendor is now characterized by more negotiation than previously, and that there are many more vendor employees in sales management. The final panelist was Deb Knox, a representative of the W.T. Cox Subscription Agency. She spoke about continued on page 60

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the administrative challenges of coping with publishers’ attempts to eliminate the role of the subscription agent in the electronic serials environment. She pointed out that allowing the subscription agent to deal with some of the aspects of serials management, such as claiming, could free librarians to interact more with patrons.

Concurrent sessions followed the panel. Amanda Wilson, then an MLS student at UNC-Chapel Hill, now of Ohio State University, reported on a pilot experience project that she completed for the Acquisitions Department of Davis Library at UNC-Chapel Hill, in which she assessed the overlap of the e-resource collections of the libraries of the Triangle Research Libraries Network (TRLN). Wilson concluded that there was room for more collaboration between the TRLN libraries, as several resources could have been licensed consortially and that had been licensed individually. Lynn Shay, of UNC-Wilmington, spoke about a user survey coordinated by her university’s library. The survey queried science faculty and graduate students about their preferred method of gaining access to materials as well as specific information about the resources they use. Shay emphasized that the survey was a learning process. The next time the library administers a survey, it will take into account lessons learned about all aspects of survey administration, from the design to the analysis of results.

During the session entitled “Demystifying Continuations,” Joshua Winant, Continuations Supervisor for Yankee Book Peddler, explained the many types of resources that may be termed “continuations,” from periodicals to standing orders. Winant described the complex realities of title changes, merging, and splitting of publications. He emphasized the ways in which a continuations vendor can reduce the complexity of the acquisition process for libraries.

In the session devoted to “Working with Vendors,” Yvette Diven, of R. R. Bowker, asserted that collaboration between libraries and vendors can occur at every stage of the process of serials acquisition to create products that serve libraries well and improve the relationship between library and vendor. Adam Chesler, of the American Chemical Society, advised librarians to communicate with vendors while products are still in test phases, and to collaborate with the vendor beyond the development or purchase of a given product.

Annis Barbee and Shirley Hamlett, both of NCSU, gave the “Serials Support Staff Update.” Shirley Hamlett reported on the ALA 3rd Congress on Professional Education: Focus on Support Staff (COPE3), a conference dedicated to addressing the concerns of support staff. She discussed courses of action that the ALA may adopt in order to give paraprofessionals more career advancement opportunities. Annis Barbee, chair of the North Carolina Library Paraprofessional Association (NCLPA), presented ways that the NCLPA could implement these courses of action, as well.

The last concurrent session, given by Rocki Strader of Ohio State University and Sandy Hurd of Innovative Interfaces, Inc., was entitled “Complicated, Constant, and Consor: Managing Electronic Resources at the Ohio State University.” Strader first described the librarian’s perspective, as a member of several large consortia. The process of acquiring and managing serials at Ohio State involves many people and complex processes over time and is always subject to change. Paying for consortial access to resources has given rise to a complex array of funding models. Sandy Hurd then offered a vendor’s perspective. She stressed that library database-management software vendors want to collaborate with libraries to develop software that meets their needs. The vendor community is interested in emerging standards such as COUNTER and Digital Library Federation (DLF) recommendations.

The conference’s final event was the closing presentation, given by Julia Blixrud, the Assistant Director of Public Programs for the Scholarly Publishing and Academic Resources Coalition (SPARC). Blixrud addressed the need to have lower-cost alternatives to the expensive e-journals that libraries currently purchase or license. She advocated SPARC’s journals, which are intended to compete with the expensive publications. In addition, she gave an overview of the Open Access movement. Blixrud outlined potential methods of paying for Open Access, including the author-pays model, the institution-pays model, offprint sales, and fees for “overleaf” journals. She noted that the academic reward structure may have to change to accommodate Open Access practices. She ended by remarking that it remains to be seen whether libraries will pay more or less with the emergence of more Open Access materials.

Nancy Gibbs of Duke University thanked the attendees and participants for making it such a success, and invited the participants to next year’s conference. The conference overall reflected the collaborative nature that is typical of those who work in the serials communication chain.

19th Annual North American Serials Interest Group Conference
Report by Rebecca Kemp (Serials / Electronic Resources Librarian, University of North Carolina at Wilmington; Phone: 919-360-0711) <rlkemp@alumni.princeton.edu> and Alicia Wyatt (Serials Librarian, North Carolina State University; Phone: 919-515-3188) <ailicia_wyatt@ncsu.edu>

Great Visions on a Great Lake
This past June, the Milwaukee City Center Hilton hosted the 2004 annual NASIG conference. Milwaukee offered a lovely setting with easy access to the Milwaukee Public Library and Marquette University. Themes that emerged in the presentations and discussions were serials standards, e-resource management, library relations with vendors and publishers, and some views of the future of serials management.

In the realm of emerging serials standards, Kristin Antelman, Associate Director for Information Technology at North Carolina State University, described NCSU’s experimental efforts to represent a serial work, as defined in the Functional Requirements for Bibliographic Representation (FRBR), in the NCSU home-grown electronic resource management (ERM) module in development, E-Matrix. Antelman described the difficulties of reconciling the perception of the serial as an aggregation of multiple items with the idea of the FRBR work as a simple unit. Antelman’s presentation brought up the thought-provoking problem that the serial may, in fact, not have a comfortable place within the FRBR scheme. The NCSU approach may have future applications, however.

Also in the area of serials standards, Regina Reynolds of the U.S. ISSN Center discussed the outcomes of two meetings of an international working group charged with examining and revising the current ISSN standard. A survey in 2004 sought opinions on the working group’s four proposed ISSN scenarios: status quo, with one ISSN for print and one for e-format; using ISSN as a title-level identifier; using one base ISSN for content and adding a suffix to indicate medium; and a title-level ISSN plus manifestation ISSN. Reynolds shared the committee’s findings that none of the proposed models met all needs of any user group. Reynolds described a possible ISSN register where publishers would assign and register ISSNs on their own with the guidance of ISSN centers. She reminded that nothing has been finalized at this point, but we should all stay tuned for future findings of this working group.

The theme of e-resource management manifested itself in many of the conference programs. Ann Creditch of Eastern Kentucky University led participants in discussing the continuing collaborative efforts between ILS vendors and libraries to develop successful ERM modules while a spillover crowd outside the conference room compared notes on their home institutions’ ERM solutions. As of yet, institutions are taking various approaches to organizing e-resource metadata, although with more widespread use of ERM modules, standardization should emerge.

Alfred Kraemer of the Medical College of Wisconsin and Abigail Bordeaux of SUNY Binghamton led a session on e-resource usage statistics. Bordeaux indicated the importance of increasing subject access to less-used resources as a possible reaction to low usage statistics and using high usage counts to help advocate for e-resource funding. While Bordeaux’s library is in an earlier stage of developing methods to analyze usage statistics, continued on page 81

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Kraemer indicated specific strategies in order to employ usage statistics. Kraemer noted that information regarding overall trends is one of the most valuable offsets of statistical analysis. Both presenters indicated that usage statistics are of great importance and will continue to be.

Tim Jewell’s presentation on “E-Resource Management: the Quest for Systems and Standards” outlined the projects undertaken by the Digital Library Federation Electronic Resource Management Initiative. The ERMI has sought to identify the types of work involved in e-resource acquisition and maintenance, from identifying a new product to product cancellation. Based on this research, ERMI has determined the kinds of functionality necessary in an ERM to support current work practices. Although ERMI has already made considerable progress, there is room for more collaboration between libraries and vendors to ensure the creation of usable systems. It was suggested that ALA and NASIG form ERM interest groups.

TDNet and the Stony Brook University teamed up for “Where Did that E-Journal Go,” a discussion of the familiar problems surrounding ever-changing e-journals and how one university copes with those changes. Michael Markwith, President of TDNet, gave the numbers to confirm what we all see individually — e-journals constantly change vital information including URLs, coverage dates, and more. Dana Antonucci-Durgan shared the specific strategies that she and her colleagues at SUNY Stony Brook have been using to manage e-journal subscriptions and resolve access problems. If you weren’t present at this session, try to get a copy of their workflow diagram for troubleshooting patron reported e-journals access problems.

The topic of library relations with publishers and vendors was addressed in the second Vision Session, “What’s the Big Deal?” Kenneth Frazier of the University of Wisconsin-Madison provided some exposition regarding the Big Deal, pointing out that faculty and students alike enjoy the wide range of titles available to them through Big Deal packages. Frazier commented that it is possible for libraries still to have strong serials collections, even if they have to eliminate Big Deals because of high costs. Loreta Ebert of Rensselaer Research Libraries countered that the cancellation of Big Deal titles can lead to a very expensive increase in document delivery. She indicated that consortial cooperation can reduce duplicate holdings and allow institutions to share access to Big Deal titles, rather than cancel Big Deals entirely.

The relationship between libraries and not-for-profit publishers was the subject of the session entitled “Proliferating Pricing Models,” led by Jan Star, Acting Head of Acquisitions at the University of Maryland Libraries, Melanie Schaffner, Marketing and Sales Manager of Project Muse at Johns Hopkins University Press, and moderated by Karla Hahn, Collection Management Team Leader at the University of Maryland Libraries. Jan Star indicated that electronic subscriptions have made it difficult for libraries to predict how much money to budget for subscriptions, but memberships in consortia can help. Consortial pricing models can bring more access to smaller institutions and relative stability to consortium members’ collections. Expressing the views of a university press, Melanie Schaffner explained that introducing “bundling” of print and electronic formats allows publishers to continue producing the print versions and seems to appeal to libraries more than offering electronic access only. While publishers worry about the amount of revenue they lose by offering consortial pricing, they can provide access to a wider range of institutions.

The concluding vision session gave a forum to speculation about the future of alternative scholarly publishing models. Heather Joseph, COO of BioOne, opened the session with a discussion of BioOne’s experience with electronic centered open access publishing. Joseph pointed out the benefits of online only publishing, including use of video and other technology that cannot be emulated in the print environment. She asserted that direct competition continued on page 82.

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between an open access journal and a traditional commercial title can positively influence the commercial title’s rate of inflation, using BioOne’s Organic Letters and Elsevier’s Tetrahedron Letters as her examples. John Tagler of Elsevier countered with the point that great costs are associated with bringing a research article to publication. He questioned where long term sustainable funding for open-access endeavors will come from; in particular, Tagler asked how to get corporations and other groups who benefit from but do not contribute substantially to research to contribute to funding in the open access model.

Also showing a ‘vision of the future,’ representatives from TDNet, Dynix, Endeavor, SIRSI, Innovative Interfaces and Ex Libris provided a vendor demo session on the new capability of integrated library systems to conduct ‘metasearches’ (also called ‘federated’ or ‘broadcast’ searches) across different sources of data, including the online public access catalog (OPAC), the Web, image databases, and library-held electronic resources. This functionality relies on the power of the software to search HTML, XML, MARC tags, and other types of metadata. Although searches of such large amounts of information may initially be slow, and it is even more time-consuming to remove duplicates among the search results, technology is always improving, and such metasearches have the potential to become standard.

The presentation on distributed print repositories addressed the future of serials preservation in this era of increasing reliance on electronic resources. The Center for Research Libraries (CRL) is teaming up with JSTOR to create repositories for the print journals used to create the JSTOR e-archive. Melissa Trego, Vice President and Director of Programs and Services for CRL and Barbara DesRosiers, Project Coordinator for the initiative discussed the Distributed Print Archives project. CRL is both serving as a repository itself, and it is coordinating efforts with partner institutions to house journal backfile runs. Depending on the success of this initiative, CRL may seek to expand its archives to non-JSTOR titles.

Finally, a new aspect of NASIG this year was its presence in a hotel setting with only preconferences on the Marquette University campus. Not everyone was in agreement that the move to a hotel was a good thing (as everyone on the NASIG listserv learned this summer), but the Hilton staff were great hosts, making sure events and meals went smoothly. Even with the pleasant Milwaukee weather, riding the elevators to your next session was certainly a breeze compared to walking across campus. Future conferences and locations were hotly conversed topics, including a brief discussion of the 2005 conference in Minneapolis. A new fundraising drawing for free attendance at an upcoming NASIG conference attracted excitement and met with financial success. Congrats to Susan Davis, the winner of the first annual drawing. See you at the 2005 conference in Minneapolis!

**Reports of Meetings — 24th Charleston Conference Issues in Book and Serial Acquisition, Charleston, SC, November 3-6, 2004**

See additional reports from the Charleston Conference in Against the Grain December 2004–January 2005 issue, v.16(6), p.66-80. The entire Charleston Conference Proceedings will be published by Greenwood/Libraries Unlimited later this year.

**Lively Lunch — MARC Records for E-journals — Friday, November 5, 2004 — Presenters: Heather Miller (Assistant Director, Technical Services, SUNY, Albany), Helen Anderson (Head, Collection Development, River Campus Libraries, University of Rochester), Carmel Yurochko (Serials/ Electronic Resources Librarian, Gumberg Library, Duquesne University), Chris Thornton (Coordinator, Bibliographic Services, Case Western University), D. Ellen Bonner (Coordinator, Technical Services, Rensselaer Polytechnic Institute), Dan MeShane (Electronic Resources Librarian, SUNY, Albany), Don Taylor (Electronic Resources Librarian, Simon Fraser University Library)

Report by Heather S. Miller (Assistant Director for Technical Services and Systems, University Libraries UB34, University at Albany, 1400 Washington Ave., Albany NY 12222, Ph: 518-442-3631, Fax: 518-442-3630) <HMiller@uamail.albany.edu>

When e-journals first made their appearance, catalogers often throw up their hands in despair and said “we can’t cope,” leaving access to such titles via a list on the library’s Website. More recently, it has become apparent that MARC records are essential. If MARC records matter at all, format is irrelevant and there is no justification for omitting e-journals. Thus, more and more libraries have been adding MARC records to OPACs. Members of this panel described some ways in which they have been able to do this. Most have tried more than one route before reaching the point they are at now and none insisted that his or her library’s method was the last word on the topic. Some of the reasons these librarians want MARC records are to serve different patron needs, to unite access to all formats of a given title in one place, to increase usage of e-journals and to include them in various types of OPAC searches. Some use the single record approach, some multiple records, some have SFX, some use Serials Solutions or Ebsco lists, some have done local pro-

**Lively Lunch — The Face of the Current Periodicals Reading Room in the Electronic Environment — Friday, November 5, 2004 — Presenters: Lawan Orser (Associate Librarian, University of Florida, Gainesville), Doug Kiker (Assistant University Librarian, University of Florida, Gainesville), Shelley Arlen (Chair, Collection Management Department, University of Florida Libraries)

Report by Leslie Horaer Button (Associate Director for Collection Services, W.E.B. Du Bois Library, University of Massachusetts, Amherst, MA 01003-9275) <button@library.umass.edu>

University of Florida staff members Shelley Arlen, Doug Kiker and Lawan Orser outlined factors that prompted an evaluation space devoted to the Current Periodicals Reading Room in the Smathers Humanities and Social Sciences Library during building renovations, when the Periodical Room moved to temporary quarters. Staff questioned whether the existing space should be devoted to another function. If the library could determine which titles were available electronically, they might be able to switch from print to online only access to better assess use of this space. They described their methodology for determining the duplication rate between current print subscriptions and full-text journals. The results demonstrated they had electronic access for 52% of their humanities and social sciences periodicals. While there was significant e-journal coverage, the library still needed a periodicals reading room and the results will assist with space allocation decisions. Discussion included questions on what will happen with periodicals rooms as more journals move toward an online only format and about browsing capability in an online environment.

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Lively Lunch — Reading and Reading Habits and How They Are Changing — Friday, November 5, 2004 — Presenter: Lucretia McClure (Special Assistant to the Director, Countway Library of Medicine, Harvard Medical School)

Report by Lucretia McClure (Special Assistant to the Director, Countway Library of Medicine, Harvard Medical School) <lucretia.mcclure@hms.harvard.edu>

The title of this paper might well read “Reading Is the issue.” Today’s library users search for information and retrieve what they discover in ways very different from users of ten or twenty years ago. Of all the changes that have occurred in libraries, one of the most startling is the change in how and what users choose to read.

Of course the Internet has opened a new path for finding information and our users prefer it, just as they loved the photocopiers and promptly gave up taking notes by hand. But this quick and easy way of finding materials has not only changed library services and practices, but it is having an impact on scholarship.

A professor notices that the quality of his students’ papers is not quite as good as in earlier years. There is a decline in the quality of writing and originality of thought and he is puzzled at first. Then he sees that there are papers with citations to books or journals all from the same year or source. He realizes that the students are taking their information only from the Internet. Of course the quality is affected for the students are accepting whatever is there, without question.

The New York Times carried a story about a young woman at Harvard. She boasted that she did all her work in her dormitory and never had to visit the library. Here is a student who has access to Widener Library, one of the top libraries in the world and she is content to take what the Internet offers. Makes one wonder why her parents continue to pay the tuition bills!

It is clear that the electronic resources are a hit. The ease of finding and printing an article without having to locate a volume, carry it to a copy machine, and then find some coins to print it is such a joy. What is missing from this scenario is the value of scanning an entire issue. There was a time when professors took their students to the library to review the latest journal issues. The professor discussed the titles, pointing out the best in his discipline, offering a pattern of reading to help keep the students up to date. How to read critically and how to evaluate what is read were topics included in that discussion.

Because of budget restraints, libraries are not able to continue subscriptions both in print and online. While we know that the print is a secure way to hold the journal for the future, our readers vote for the electronic versions. At the Countway Library of Medicine, we are maintaining a core group of some 500 titles in print along with the electronic access in order that our students and others can have the privilege of reading entire issues, of stumbling across wonderful items that would not be found in any other way. Thumbing through a journal issue gives the reader a sampling of topics of current high interest. Reviewing a year of a particular title tells the reader what took place in medicine that year. If you go to the 1929 issue of the British Journal of Experimental Pathology to find Sir Alexander Fleming’s original article on penicillin, you would have a view of what was happening when he made the discovery.

The Journal of Physiology is a good example of the value of reading issues. The early issues of this title is a treasurehouse of the authors who played such an important part in the development of this discipline. Reading the Journal of Physiology over a long period of time gives one an excellent view of the issues and discoveries in physiology with authors, many of whom may also be found in the list of Nobelists. Just listen to these names—Victor Horsley, Charles Sherrington, J. N. Langley, A. V. Hill, Henry Dale, W. H. Gaskell, all leaders in physiology.

The wonder of serendipity is fully outlined in Robert Merton’s book, The Travels and Adventures of Serendipity. He makes a strong case for the value of “happening to find” when reading beyond the desired article. And that is one of the great benefits of scanning issues on a regular basis.

The change in reading habits is not limited to students and scholars. The National Endowment for the Arts recently issued a report stating that Americans are reading less today. The sharpest decline in reading occurs among young adults, 18 to 24 years of age. This report, entitled Reading at Risk, shows a steady drop in the percentage of Americans who read books of any sort during the past two decades. The decline in numbers of Americans who read literature, poetry and drama is even steeper.

The question is why should we press our students to read books and journals in addition to selecting articles from a literature search?

The journal issue affords a range of articles and topics and many other items:

- editorials that often discuss the hot topics or trends
- letters to the editor that reveal opposing opinions, challenge a statement, or point out errors
- the historical vignettes included in many journals
- a variety of writing styles, leading to an understanding of what makes good writing
- introduces students to the leaders in a field
- enriches vocabulary
- introduces the reader to other disciplines

The library may provide journals in hard copy but that does not guarantee that someone will read them. Librarians must have the support of professors and administrators if we are to make this kind of reading a reality. The pressure on students makes the Google approach very tempting. A professor from a major university says that today’s students have a “poverty of expression.” In a college course that involves reading or writing, he states “we are teaching immigrants, immigrants to the culture of literacy.”

This is a gloomy prospect for the future of learning and scholarship. The challenge to libraries is to make journals available, seek the help of instructors to help encourage their use, and make the library THE place to be. We must utilize the electronic resources that enrich our work, and at the same time, make clear how to evaluate and critique the sources.

My experience has been with medical students and physicians. I see how much they depend upon the computer for access and delivery of information. It is of concern for all, but the consequences in medicine can be drastic. There was a young physician at a major medical center who wanted to carry out clinical trials as well as to treat patients. He outlined a trial with the purpose of inducing asthma-like symptoms in healthy subjects. The drug used was hexamethonium. The physician did a search of the literature on MEDLINE, the trial was approved and volunteers obtained.

The study began. It was based on the theory that, normally, lung inflation protects the airways from obstruction through a neural mechanism, one that may be lacking or impaired in people with asthma. The volunteers inhaled hexamethonium.

Then tragedy struck. A healthy young volunteer was dead. A promising young physician’s career was in ruins. Why? What happened?

The investigator failed to search the literature. He used one database that went back to 1966. He did not read the earlier literature or even consult with older physicians who would have warned of the dangers of this drug. The University publicly announced that the cause of this tragedy was the investigator’s failure to review and read the literature. The only good to come from this sad story is that now librarians are assigned to every clinical trial team.

This event sent an immediate warning to the medical community. Ignoring the past literature is dangerous. As librarians, we can help keep this awareness alive for we have the opportunity in our classes and reference encounters to point out the best resources, no matter the format.

You may have read books by the well-known surgeon Sherwin B. Nuland. He is author of How We Live, How We Die, Wisdom of the Body. After his retirement from surgical practice, he wrote about why he chose surgery, the changes in its practice during the past years, and why he is not sorry to be out of the operating room. He says that the changes he continued on page 84
CHAOS — eBooks: Where Have All the Standards Gone?

by Karen Coyle (Digital Library Specialist; Phone: 510-540-7596; Fax: 510-848-3913) <kc oy le@kcoyle.net> http://www.kcoyle.net

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In 1998, with much fanfare, a core group of publishers and technologists launched an effort to create standards for eBooks. The promise was that these standards would define an eBook format that could be used on any device; that would be interchangeable between eBook brands; and that would make it easy for publishers to create eBooks from the same data files that were used to drive the printing of the hard copy products.

It is now 2005 and that standard does not exist, and work on it has almost ceased. Did it prove too difficult? Hardly. What intervened in the years between 1998 and 2005 was the reality of the eBook market. In the digital market it is the delivery of products in proprietary formats that drives competition on the marketplace. With games (such as Segu, Nintendo, Xbox) and music, (such as iTunes, Real, Microsoft Player), the sale of hardware players stimulates the related sales of content, and the desirability of the content in turn stimulates the sales of hardware devices.

This model did not work for eBooks, and the various attempts to produce eBook reading devices that would drive a market for the books themselves failed. Instead, eBook reading software is often provided as a free add-on to computing devices that users already own, either hand-held Personal Digital Assistant devices like Palm or Clio, or for personal computers. With the reader being given away for free, the revenue for the eBook delivery comes from converting the book to a particular proprietary format such as Adobe PDF, Microsoft Reader format, or Mobipocket. Although there are about two dozen eBook formats, those three capture the majority of the market.

Does this mean that there is no need for standards in the eBook arena? And what has happened to the years of standards work that has already been done?

The Open eBook Forum (OeBF) was formed by the original 1998 group to develop the standard eBook publication structure. After about five years of activity, a version 1.0 standard was published, and significant work was done on version 2.0, which would have a greater level of detail and additional features. It turned out that although the eBooks that were sold to consumers would be in proprietary formats, publishers needed a single format that they could use that could then be converted automatically to the many formats required in the retail market.

Because there was no other standard, the OeBF publication structure has become a de facto standard inside many publishing houses. In addition, the version 1.0 standard forms the basis of the Digital Talking Book, (aka ANSI/NISO Z39.86) a clever marriage of voice and text that can serve sighted and sight-impaired readers equally well.

The standards work that has continued in the eBook area is that which facilitates business models. The OeBF has endorsed the use of the MPEG-21 Rights Expression Language for the rights management function of eBook delivery and protection technologies. There has also been work in OeBF on methods for data that should accompany each eBook, such as that describing the author, title, and other important publication data that we normally seek on the title page of a physical book. This data relates to the publisher metadata standard “ONIX” and will provide for additional automation of data passing through the supply chain from the original publisher through the wholesale and retail systems.

There is still a great deal of need for standards in the eBook area. A more advanced publication structure would facilitate the long-term archiving of digital texts so that back list books could be easily republished, or published on demand, when some external factor causes renewed interest in the topic. Such a structure would also allow libraries to store archival quality versions of the eBooks that they purchase so that these can be preserved for future generations, long after the hardware and software of the proprietary formats have become technological dinosaurs.

The range of business models that are supported by both the delivery systems and the rights management standards is very large. There is also a large base of possible consumer models. Individual consumers will want to know what options are available with each eBook product that they buy, and will favor those that fit best into the existing hardware, software and workflows of the user. Institutional customers, like libraries and educational institutions, will negotiate particular contracts with eBook providers. These negotiations are often costly for both the institution and the provider, and could be made more efficient with the use of standard contracts that vendors can offer. And companies will want enterprise-wide solutions that will have different requirements from those of the institutions in the non-profit sector that could equally benefit from some “best practices” for licensing agreements.

Where standards are often beneficial is in the areas where digital materials must cross the threshold between one system or platform and another. In the most simple model, an eBook

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