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Our E-journal Journey: Where to Next?
by
Greg Sennema

Abstract

In early 2003, the Hekman Library of Calvin College and Calvin Theological Seminary decided to offer access to all of its e-journals, including titles within aggregators, using brief MARC records in its online catalog. This article describes the history of this decision, and how recent developments in e-journal management will affect it in the future.

Keywords

Electronic journals, collection development, cataloging

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Our E-journal Journey: Where to Next?

In the Beginning

The e-journal scene from 1999 to 2003, as many librarians will acknowledge, has been in an exasperating constant state of flux. It seems as though any “final” decision made regarding e-journals remains tentative and liable to change because of changes by vendors who provide e-journal content, as well as changes in products by companies that help libraries manage their e-journals. When I began as Digital Resources Librarian in 1999, the number of e-journals our library could access online (not including those sent to the library on CD-ROM, remember those?) was quite limited. Some attempts had been made, prior to my arrival, to create static web pages with lists of e-journals, and also to create a Perl-scripted database of all our e-journals, but for various reasons these attempts were not sustainable.

Initially, any attempt to deal with our continually growing collection of e-journals had to take into account the limited amount of resources we could devote to them. Serving a population of 4300 FTE students and employing 17 FTE staff, the library devoted 2 FTE staff to work with the 2700 print serial subscriptions. Needless to say, those two staff members had little time to consider how to deal with the countless issues that typically arise in trying to cope with e-journals.

As the librarian in charge of the library’s electronic resources, it often fell upon me to deal with the frequent requests by faculty and students for online articles. Realizing the impact that these types of requests could have on my

other duties, the Library Director and I came up with a policy that stated that the library would fully catalog our e-journals within the online catalog only if we could guarantee (insofar as we were able) future archival access to the individual titles. At the time (2000), these included all of our e-journal titles acquired through JSTOR and those titles we accessed through the Print Subscriber Program (PSP) of OCLC's Electronic Collection Online (ECO) database. Besides JSTOR and ECO, the only e-journal collection that the Library subscribed to at that time was a package deal with Academic Press (a deal which fell apart in 2002 when Elsevier bought the titles). Access to all other titles would be dealt with on a case-by-case basis, including those titles contained within full-text aggregators. While perhaps not technically an e-journal or e-journal content, full-text journal articles in aggregators such as LexisNexis Academic and InfoTrac Onefile qualify them, if only from the patrons' point of view, to be categorized as e-journal content as well.

Initially, this policy of full MARC records for a select number of e-journals worked well for all the library staff: we were able to generate statistics that indicated the library's subscription to a specific number of e-journals; our cataloger was able to locate quality MARC records for all of the titles; our serials staff did not have to deal with e-journals; and finally, I only had to deal with the technical aspects of access and some licensing issues. However, as time went on, we received more and more requests for online access to our print journals, with many of our faculty (and even some savvy students) repeatedly pointing out

to library staff that as an institution, we could take advantage of free access to the online version based on our print subscription.

In addition, our reference staff had a difficult task in discerning the full scope of online articles we had access to by searching our online catalog, and at the source lists of each of the aggregators to which we subscribed. To help us in this regard, library staff took advantage of a new tool called *jake* (Jointly Administered Knowledge Environment), a freely available web source that contained information about journals, including which subscription database included a title, for what years, and even whether full-text was included. Moreover, the library systems programmer was able to customize *jake* in such a way that the *search* and *results* pages appeared as if they were part of the library's web site.[1] More importantly, subscription databases appeared in a *jake* results list only if the library subscribed to the database. However, we could never completely rely on the accuracy of the information within *jake*, and for various reasons *jake* was frequently inaccessible.

How about a separate listing of all our e-journals?

In late 2001, the library systems programmer and I began to investigate our options for creating our own version of *jake*. By this time, we already had experience in creating web-accessible SQL databases for other library projects, and so creating our own version of *jake* did not seem that difficult. We also began to learn about libraries creating their own e-journal locator databases. Like *jake*, the content of these databases was created from title lists supplied by the database vendors; unlike *jake*, however, the e-journal locator would only

include records for full-text journals (i.e., journals, periodicals, serials, and magazines) contained in the library's subscription databases.

By May of 2002, the Hekman Library E-journal Locator was up and running (see Figure 1). Creating the data for the E-journal Locator was a simple matter of downloading title lists from our various aggregators, cleaning up the data using Microsoft Excel commands and macros, and then uploading the data using a Perl script.[2] Of course, some vendor title lists required more cleanup

Figure 1 – Screen shot of the E-journal Locator, incorporated as a separate resource within the library's online catalog.

than others, and some e-journal title lists, such as those accessible on publishers' web sites, had to be created from scratch. Library staff successfully used, and advised our patrons to use, the E-journal Locator for over a year, demonstrating that in order to complete a thorough search of all the library's periodical holdings – print or online – a search had to be completed in both our online catalog and the E-journal Locator.

By early 2003, however, it became evident from comments by our librarians as well as our patrons that we would be doing everyone a favor by consolidating all of our periodical title information. To meet this goal, we considered two options: either to load a list of all our print journals into the E-journal Locator and renaming it the "Journal Locator," or to load all of our e-journals into our online catalog. While the first option was technically easy to complete, we could not ignore the fact that the library already devoted considerable resources to maintaining our online catalog, and that we would still be forcing our patrons to search our complete holdings in two places. In addition,

the reference and instruction librarians spend a considerable amount of time teaching patrons how to use the online catalog, and duplicating information regarding any part of our resources (the print titles would still be in both online catalog and the Journal Locator) would probably not appear to our patrons as the most straightforward way of offering our online resources.

On the other hand, finding and maintaining MARC records for over 11,000 of our e-journals was not a desirable endeavor. Yet this begged the question: did we really need full MARC records to describe our e-journals? From our patrons' perspective, viewing a full MARC record using AACR2 cataloging rules versus a brief MARC record in the online catalog is largely a moot point, as long as basic information, including a hyperlinked URL and years of coverage, is included. With this in mind, we began to investigate whether it would be possible to load the E-journal Locator data into our catalog, and determined that we could run automatic reports from our Sirsi system to nightly pull the data from the E-journal Locator.

One of the problems we faced with the data in the E-journal Locator was that duplicate listings existed in the database since access was available through a variety of sources – some of the titles were available from no less than seven vendors. Regardless of whether we chose the E-journal Locator or the online catalog as our central location for periodical information, we wanted to be able to present our patrons with one record per e-journal title, and then within each of these records, display the “holdings” information, including vendor name and dates of available issues. Our systems programmer solved this problem by

implementing a complex script in our E-journal Locator that created individual title records (see Figure 2). Whenever a comma-delimited file was uploaded

Figure 2 – WebCat displays each e-journal as one record, with access to the title through various vendors represented as holdings.

into the E-journal Locator, the program searched for ISSN information in the ISSN field, and if it found a match, would append the holdings to the existing e-journal title record. If the ISSN was not in the database, or if the title did not have an ISSN, it searched for a title match. If no match was made on ISSN or title, a new e-journal record was created.

By solving the problem of duplication, we effectively broke down the last barrier to loading all our e-journal data into our online catalog. It was now possible to have an average maximum of two bibliographic records result from a typical journal search in our online catalog – one, an already existing record for the print title; and another, a single record representing the online journal, perhaps from a variety of vendors. In June 2003, we tested the Sirsi report that pulled e-journal data into the online catalog, and were so satisfied with the results that we immediately went public with all our journals – print and online – loaded into our online catalog (see Figure 3).[3]

Figure 3 -- Results of an e-journal search after the E-journal Locator data was loaded into the online catalog.

Our intention was to have maximum of two records (on average) appear for a typical periodical search in our online catalog, one for the print and the other for online. However, as mentioned earlier, up until this point in time we had been entering MARC records for all of our JSTOR and ECO titles. And while these titles also appeared as holdings from the E-journal Locator data, we did not want

to delete the MARC records outright, since we wished to retain some call number and subject statistical data regarding our e-journal collection. We resolved this problem by suppressing these MARC e-journal records from the public view of the catalog, while allowing them to remain accessible to staff using the catalog's client software.

The Library's E-journal Locator evolved into the online administrative environment used by library staff to manage the lists of e-journals. Title lists are loaded into or created using Microsoft Excel, with each row representing an e-journal record, and each column representing a unique field. Most of the fields that we wanted to include were self-evident: title, ISSN, electronic ISSN, publisher, vendor, and full-text start and full-text end dates. Other fields were added as a convenience to our users. These included a comments field (for example, language information) and a "reviewed" field, which indicates whether the title is peer-reviewed. We considered adding a subject field, but decided against this since most vendors did not (at the time) provide subject information in their title lists, and it was not feasible for library staff to add this information manually for each title.

One of the persistent concerns that we continue to face is the amount of time needed to keep our E-journal Locator data up-to-date. It did not go unobserved by us that while we were grappling with the problems posed by our e-journals, we were being courted by various vendors who offered (for a fee) to maintain our data for us. One of the claims these vendors made was that individual libraries would have a difficult time keeping up with all changes to the

aggregator title lists. This was true; and yet in some ways it was misleading since month by month, the percentage of change within a particular database is relatively small. Furthermore, we felt that we could beat the odds of a patron actually trying to access one of the titles – often an obscure title -- that was added or dropped during the two to three month lag time that it took for us to get around to updating a title list from particular database vendor. In any case, with “selected full-text” and ambiguous full-text start and end dates, *complete* title coverage in any aggregator is a non-reality regardless of whether we or an outside vendor compiled the title lists.

At present, our cataloging and serials staff currently have little involvement with our e-journals (serials staff are involved at the ordering level). Eventually, e-journal maintenance within the E-journal Locator will be handed over to our serials staff. I have estimated that I spend an average of ten hours/month maintaining the e-journal record data. Whether in spite of, or because of, this amount of time, we rarely come across records for e-journals that are no longer available to us; if we do arrive at a dead end looking for a particular article, it is most often because the vendor’s title list inaccurately stated the dates of coverage, or because we were looking for a freelance article that was pulled from the database due to the Tasini decision, or that simply was not part of the aggregate’s “selected full-text.”

Where to next?

As of March 2004, our e-journal situation remains stable. We provide access to over 11,000 online periodical titles, all searchable in our online catalog

by title or ISSN, with a minimal amount of staff time devoted to maintaining these records. Our librarians and our patrons are pleased, notwithstanding the fact that links to aggregators currently bring the user to the main search page of the database, a confusing destination for a patron who is searching for a particular journal title. Managing our non-aggregator databases became markedly easier after we began subscribing to the EBSCO's Electronic Journal Service (EJS). EJS offers us the ability to have in one place as complete a record as possible of e-journal access information, together with registration and user access notes, as well as usage statistics.

And yet I am uneasy about feeling too smug about our current situation, and I believe I know what the culprit is: OpenUrl technology. When many of the vendors approached us with their products to help us maintain our e-journals, they also pointed out that not only could they provide links to our e-journals, they could also provide direct links to individual articles. Not being too afraid of technology, the library systems programmer and I successfully determined that we could use our E-journal Locator as the basis for our own OpenUrl server. And here is where any sense of smugness surely disappears, for maintaining a database of ever-changing journal titles is *nothing* compared to the prospect of maintaining a database of information that directs users to *every single article* in all these journal titles.

We understand that we will inevitably need to pursue OpenUrl technology since our users will come to expect full-text links between all of our subscription databases. In the meantime, we have several reasons for wishing to hold off on

this pursuit. First, while not as direct as a full-text link, our online catalog e-journal records are nonetheless a considerable achievement and a significant research aid to our patrons. Second, over 50% of the databases that we currently subscribe to are through OCLC FirstSearch, which for years has provided its own internal full-text links not only between FirstSearch databases, but also to full-text contained in JSTOR. There are also such links between JSTOR and Project Muse, as well as links between Infotrac and Ingenta. It is entirely possible that internal links like these will only continue to proliferate within our subscription databases to the point that a subscription to an OpenUrl service like SFX might become unnecessary.

For now, we remain content with all our e-journals sitting alongside our collection of print periodicals in our online catalog. In one respect we have nothing to lose: if the e-journal maintenance becomes too cumbersome, or if demand for full-text links using OpenUrl technology becomes stronger, we can simply turn to an e-journal or OpenUrl vendor for immediate service. Indeed, we have two things to gain by maintaining our current status quo: a financial savings by not utilizing a vendor's services, and a potentially clearer picture in the future of the which vendor will supply the best service for the lowest price.

Notes

[1] For more information on how the Hekman Library configured jake, see

<http://www.calvin.edu/~jkoops/jake.html>

[2] For more information on using Excel to generate brief MARC records, see

Ann Mitchell, "Tracking Aggregator Coverage With Spreadsheets," *The Serials Librarian* 42, no. 1 (2002): 19-23.

[3] See Charity K. Martin and, Paul S. Hoffman, "Do We Catalog or Not? How Research Libraries Provide Bibliographic Access to Electronic Journals in

Aggregated Databases," *The Serials Librarian*. 42, no. 1 (2002): 61-77. The

authors point out that the SIRSI system's macro ability to assist in the creation of records.

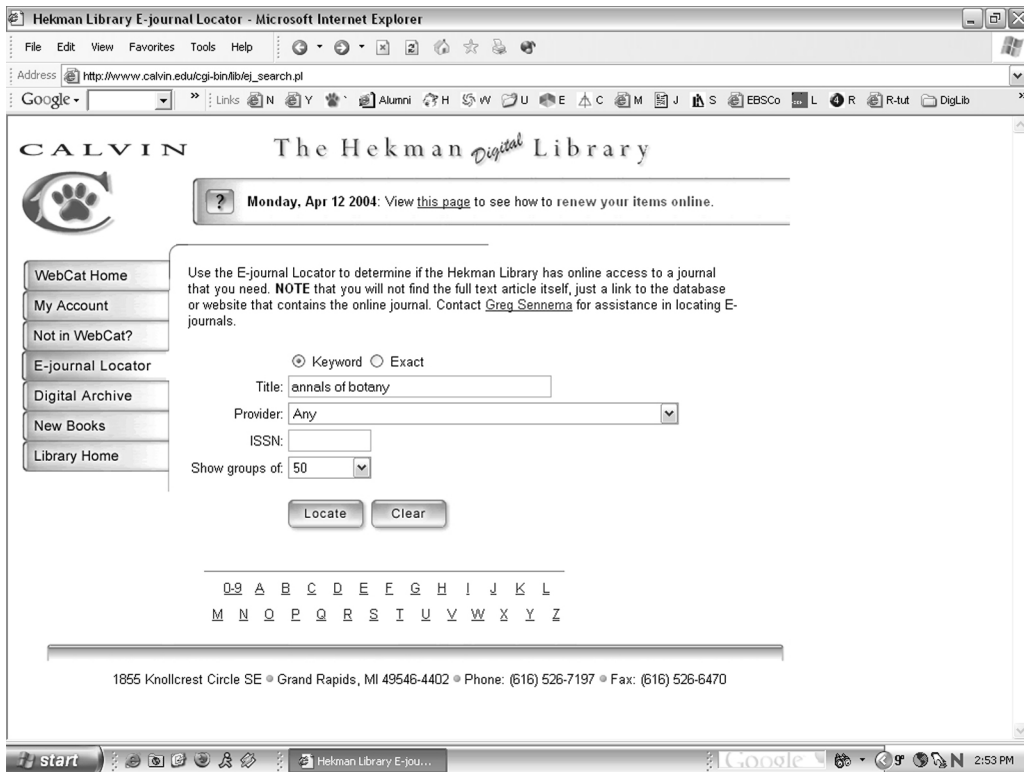


Figure 1 – Screen shot of the E-journal Locator, incorporated as a separate resource within the library's online catalog.

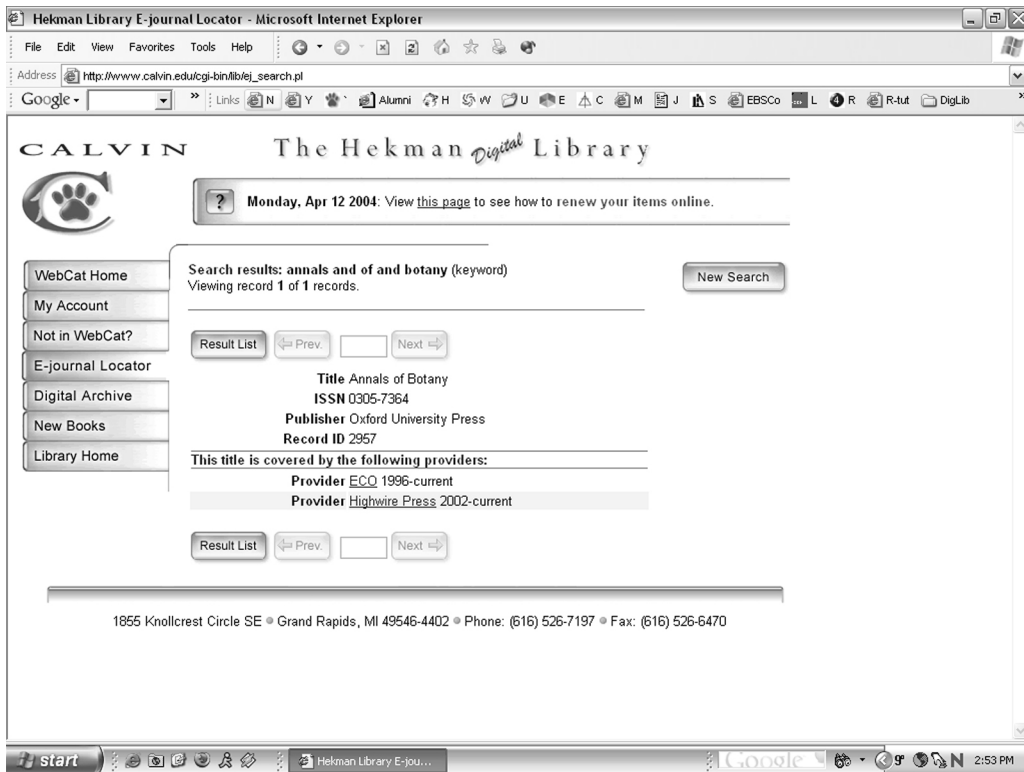


Figure 2 – WebCat displays each e-journal as one record, with access to the title through various vendors represented as holdings.

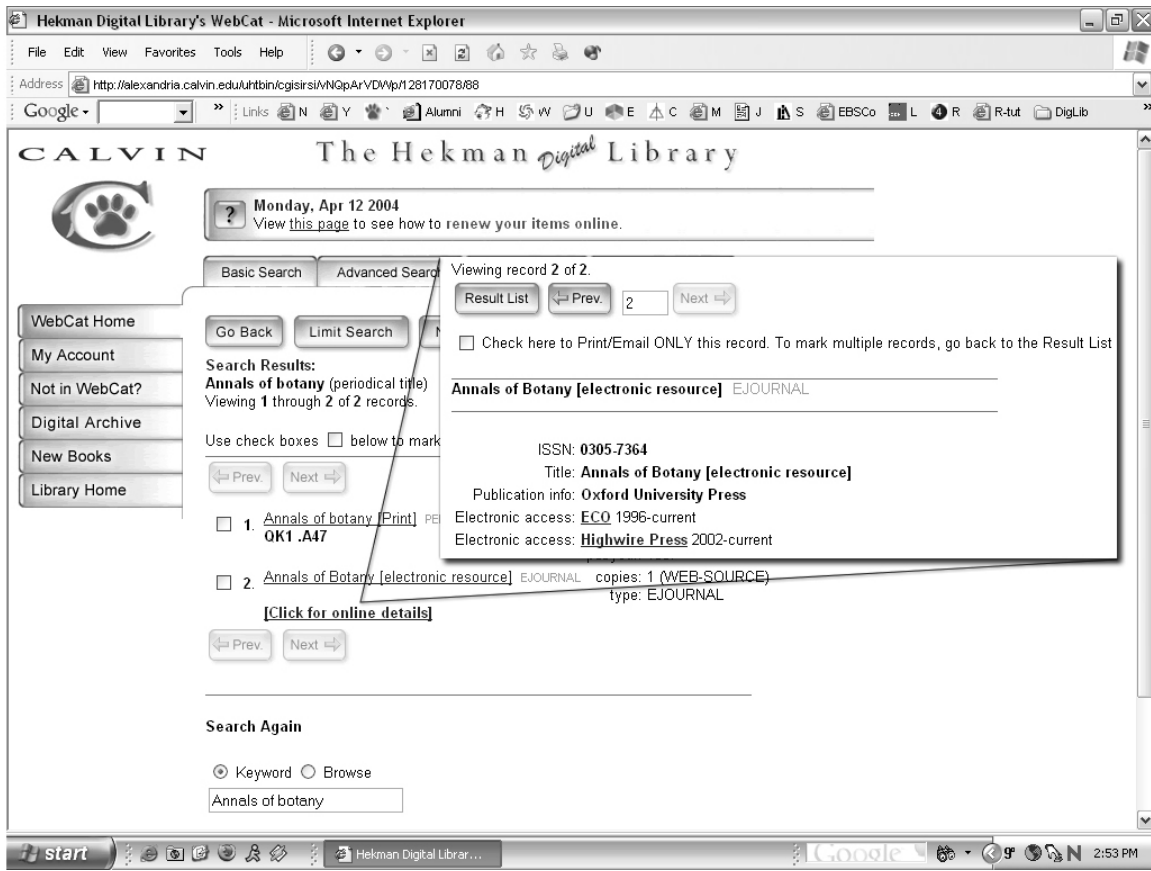


Figure 3 -- Results of an e-journal search after the E-journal Locator data was loaded into the online catalog.