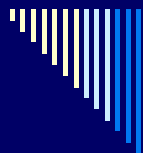


## Managing Electronic Serials



Virginia Kinman, Longwood University  
Louveller Luster, Virginia State University

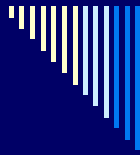
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## What is an e-journal?

- “Journal that was born digital or one that has been digitized.” (Fowler, David C., ed. *E-Serials Collection Management: Transitions, Trends, and Technicalities*. New York: Haworth, 2004, p. 159)
- “An electronic version of a journal that is found and read on the Web.” ([www.sunysb.edu/library/tutorial/glossary/](http://www.sunysb.edu/library/tutorial/glossary/))
- “Journal published in electronic format.” ([www.sunyjefferson.edu/Library/webcourse/course/glossary.htm](http://www.sunyjefferson.edu/Library/webcourse/course/glossary.htm))
- “A journal which is available via the Internet. The journal is usually, but not always, also available in paper format. Also known as Electronic Journal.” ([www.sfl.mmu.ac.uk/sflldemo\\_small/glossary/gloss\\_e.html](http://www.sfl.mmu.ac.uk/sflldemo_small/glossary/gloss_e.html))

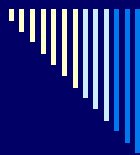
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## What is an e-journal?

- We will include in our definition of e-journals the full-text (HTML or PDF) of selected content or all content of a print journal, as often covered in aggregator databases such as InfoTrac.
  - E-journal coverage from aggregators may not include editorials, regular columns, ads, graphics or figures in original print

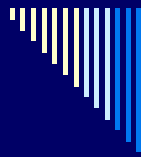
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## Types of E-Journals

- Open access free online journals
- Subscriptions:
  - Print subscription with free online counterpart
  - Print plus online subscription
  - Online only subscription
- Publisher online journal package
- Vendor package of online journals from different publishers
- Consortia supplied package or title list
- Full text in an aggregator's database (InfoTrac)
- Online e-journal archive (JSTOR)

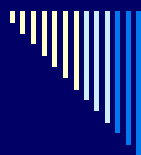
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## E-Journal Management

- More complex
  - Less routine and straightforward
  - Requires broader technical knowledge related to access issues
  - More intensive troubleshooting with little similarity of instances
  - Requires staff with higher level of competencies
  - Cooperative purchases with consortia may cost less but require more professional time to set up and maintain

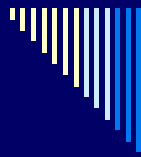
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## E-Journal Management

- More costly
  - Drexel University study found the cost for record creation and maintenance of e-journals to be 60% higher than for print.
  - Association of Subscription Agents survey found that 2/3 of respondents felt e-journal subscriptions were harder to set up than print.

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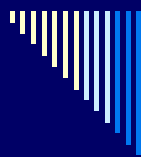


## E-Journal Workflow

1. Resource Identification	Agent
2. Selection	Library
3. License Evaluation/Negotiation	Library
4. Ordering/Order Tracking	Agent
5. Payment/Pre-Payment	Agent

Source: Workflow steps and sequence taken from Lugg, Rick and Leslie O'Brien, "Agents in Place: Intermediaries in E-Journal Management," p. 3, <[http://www.harrassowitz.de/top\\_resources/docs/AgentsInPlace20031024.pdf](http://www.harrassowitz.de/top_resources/docs/AgentsInPlace20031024.pdf)>

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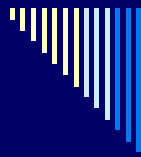


## E-Journal Workflow

6. "Receiving"	Library/Agent
7. Discovery/Access Management	★
8. Usage Tracking	★
9. Renewals/Cancellations	Library/Agent

Source: Workflow steps and sequence taken from Lugg, Rick and Leslie O'Brien, "Agents in Place: Intermediaries in E-Journal Management," p. 3, <[http://www.harrassowitz.de/top\\_resources/docs/AgentsInPlace20031024.pdf](http://www.harrassowitz.de/top_resources/docs/AgentsInPlace20031024.pdf)>

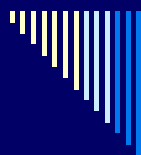
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## Access Issues

- ❑ Authentication (IP or username/password)
- ❑ On-campus and remote access
- ❑ Registration or activation with publisher or intermediary (i.e., Ingenta)
- ❑ Multiple content delivery points (publisher, aggregator, intermediary)
- ❑ URL maintenance
- ❑ Change in publisher (Elsevier)
- ❑ Archival content after subscription expires
- ❑ Multiple local access points (OPAC, A-Z List, link resolvers)

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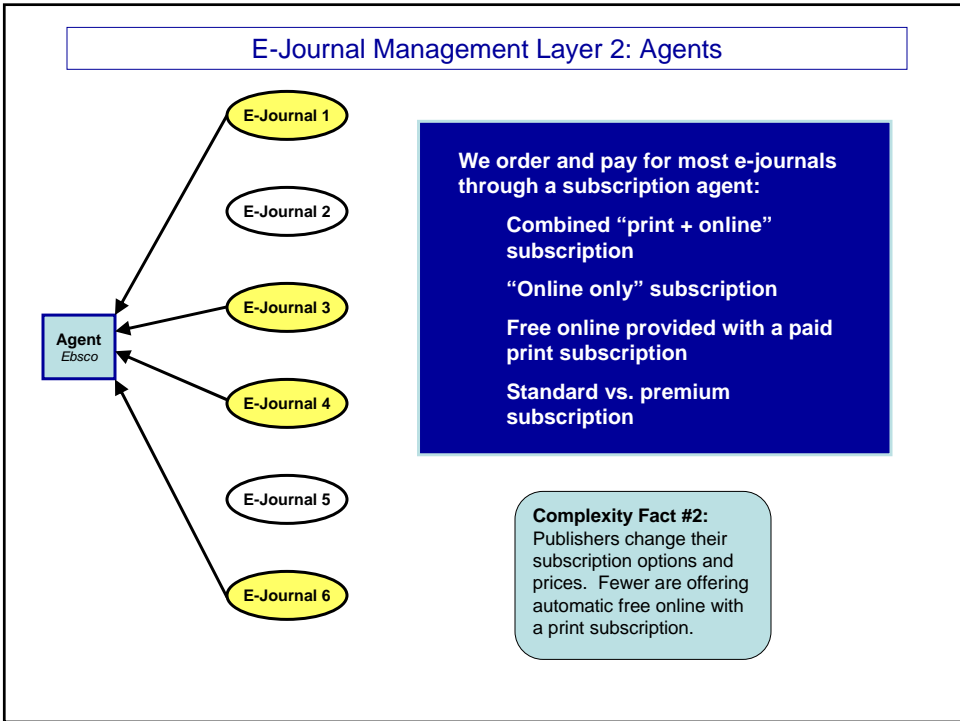
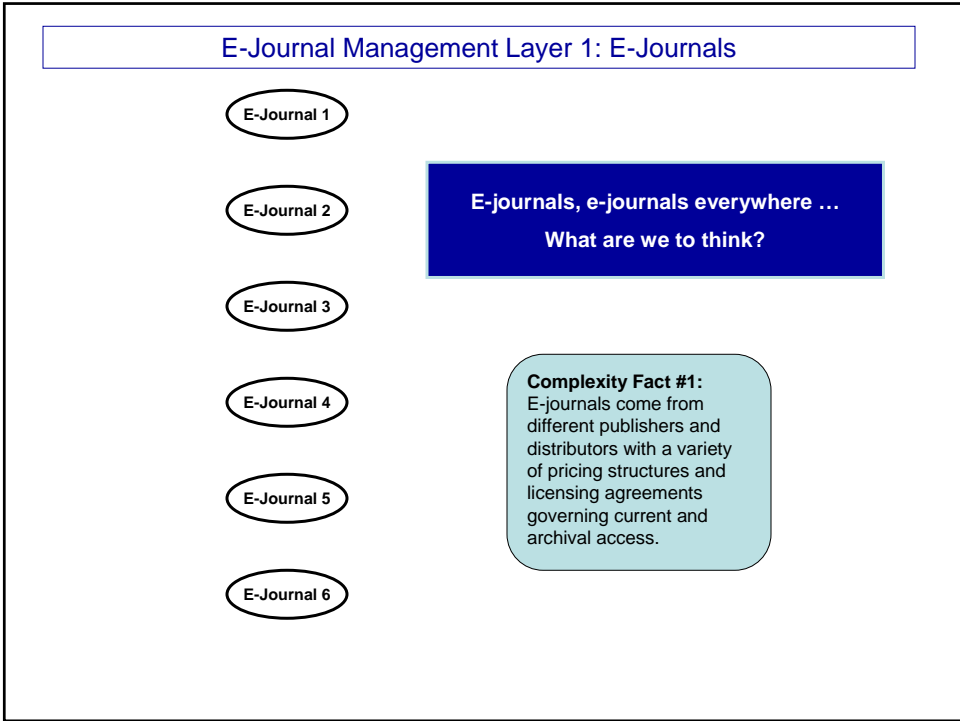


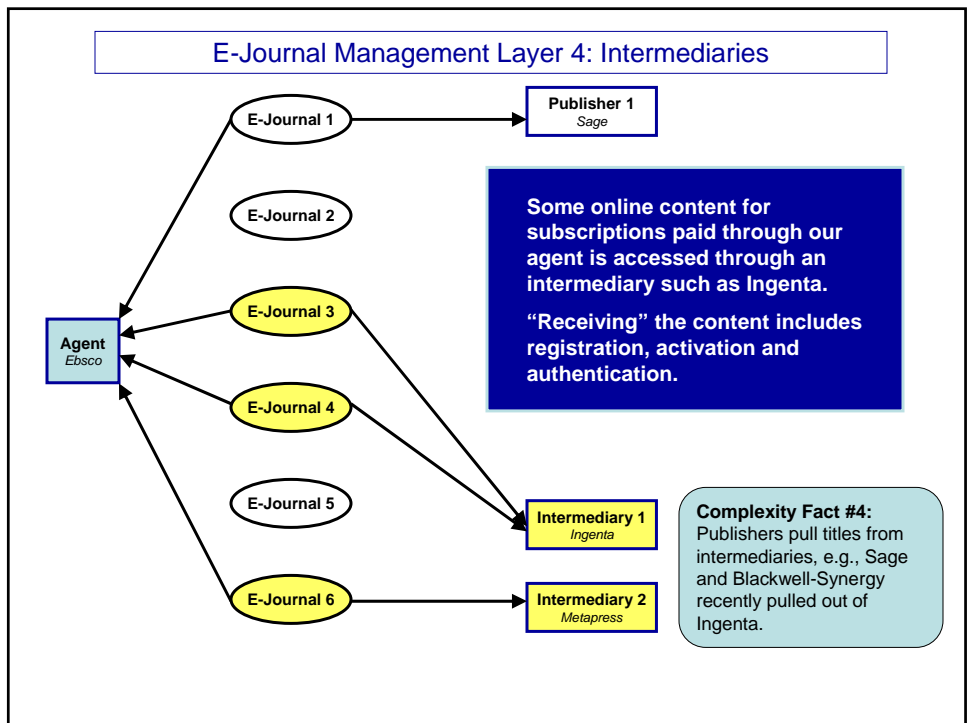
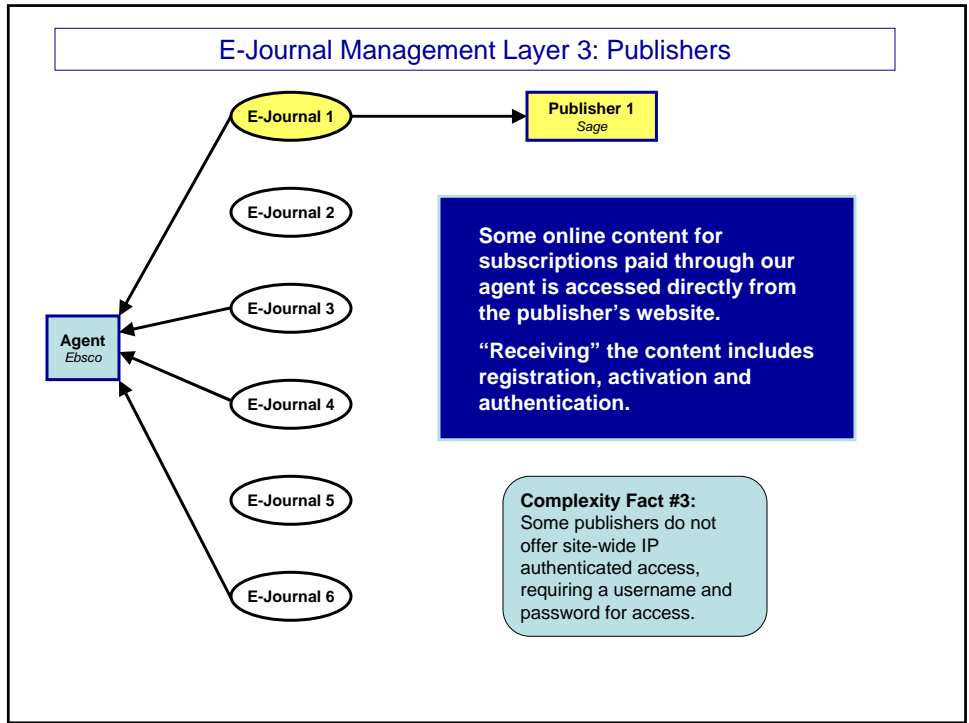
## E-Journal Management Layers

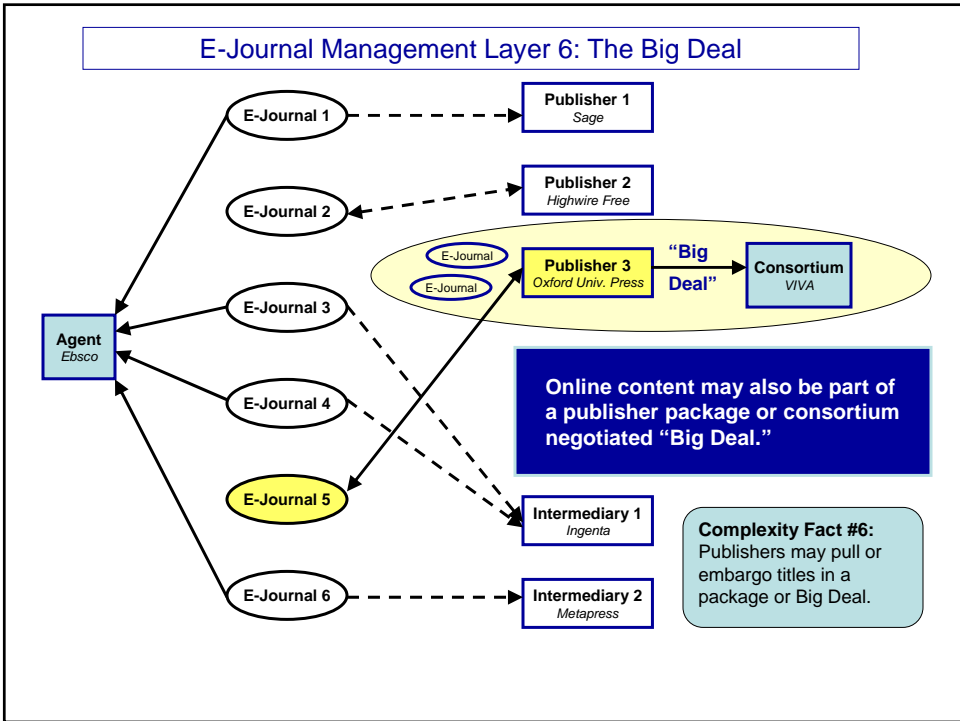
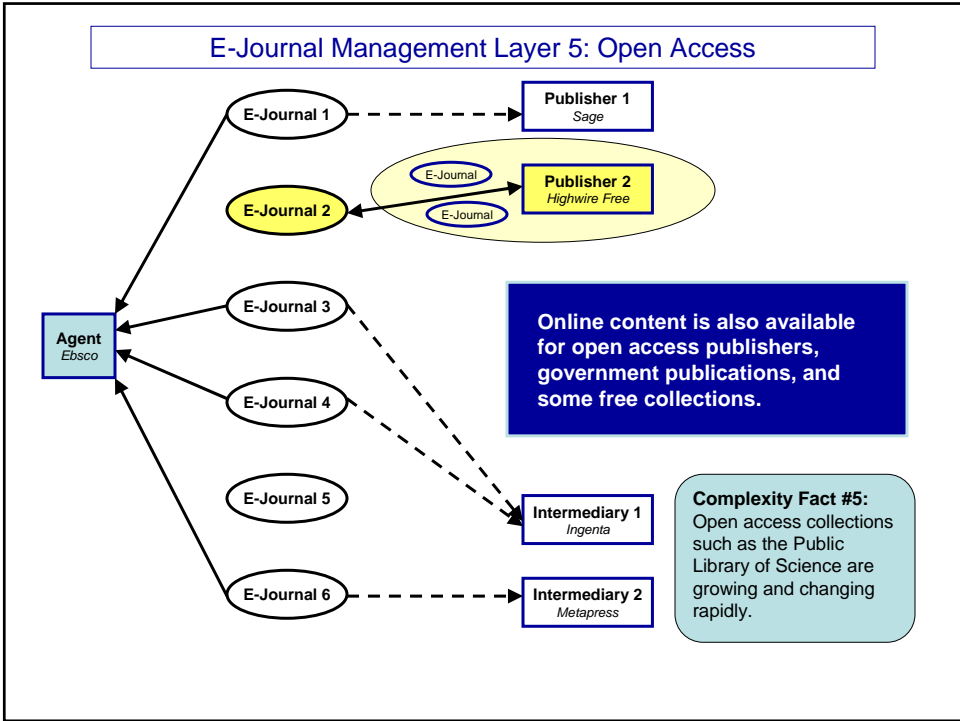
- ❑ A highly simplified model of the layers of complexity that we deal with in managing e-journals . . .

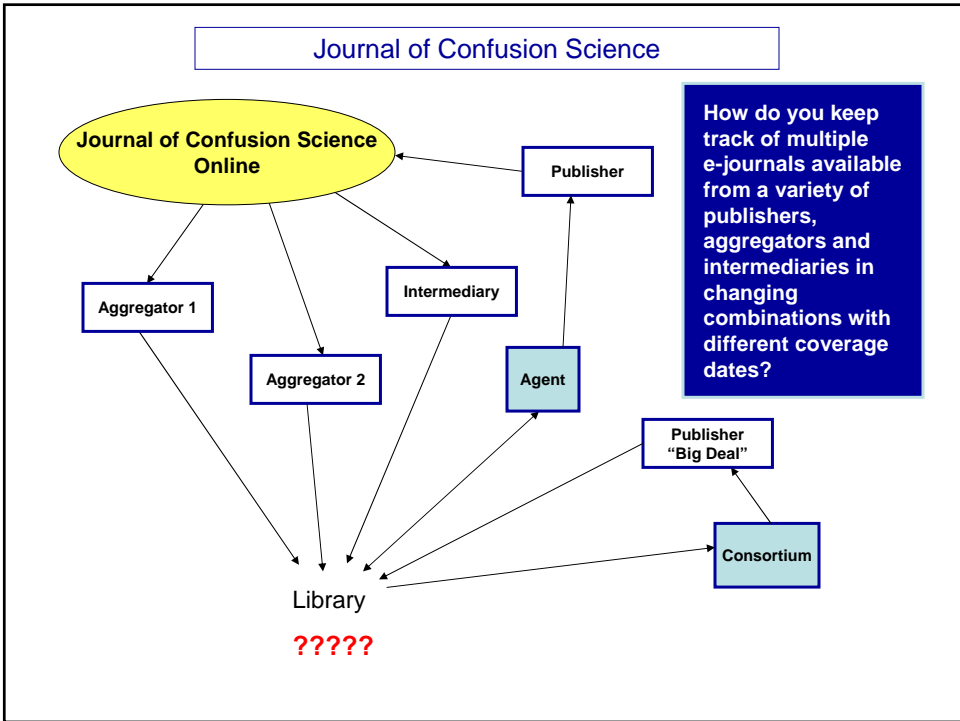
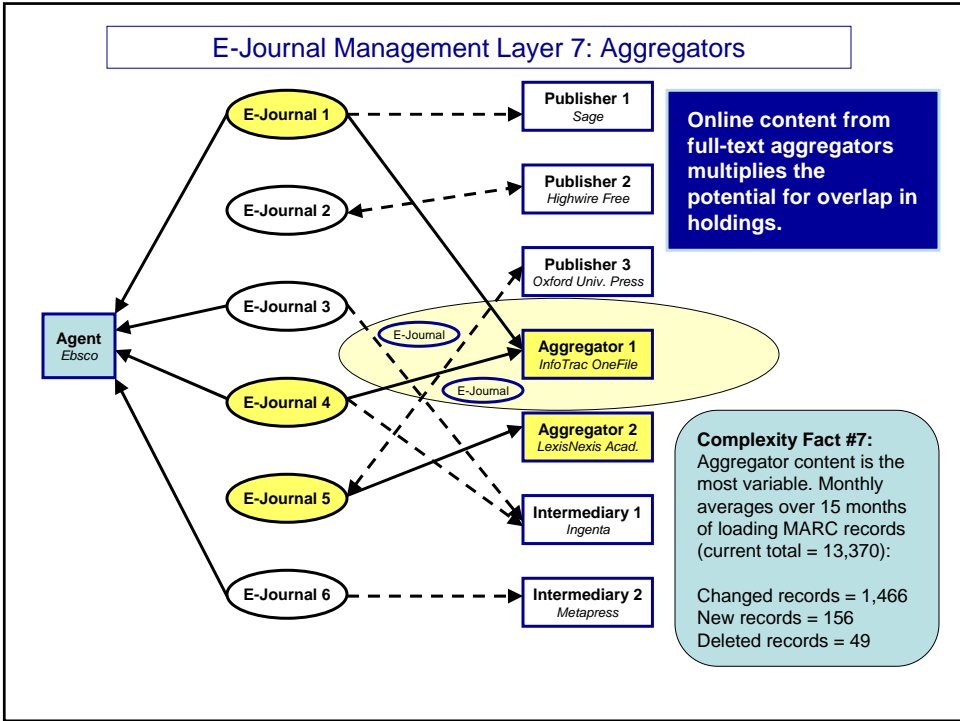
CAVEAT: The following slides are not intended to reflect the workflow of e-journal management or every process in the life-cycle of an e-journal. They are merely a graphic representation of the layered web of pieces and players that are inherent in managing e-journals.

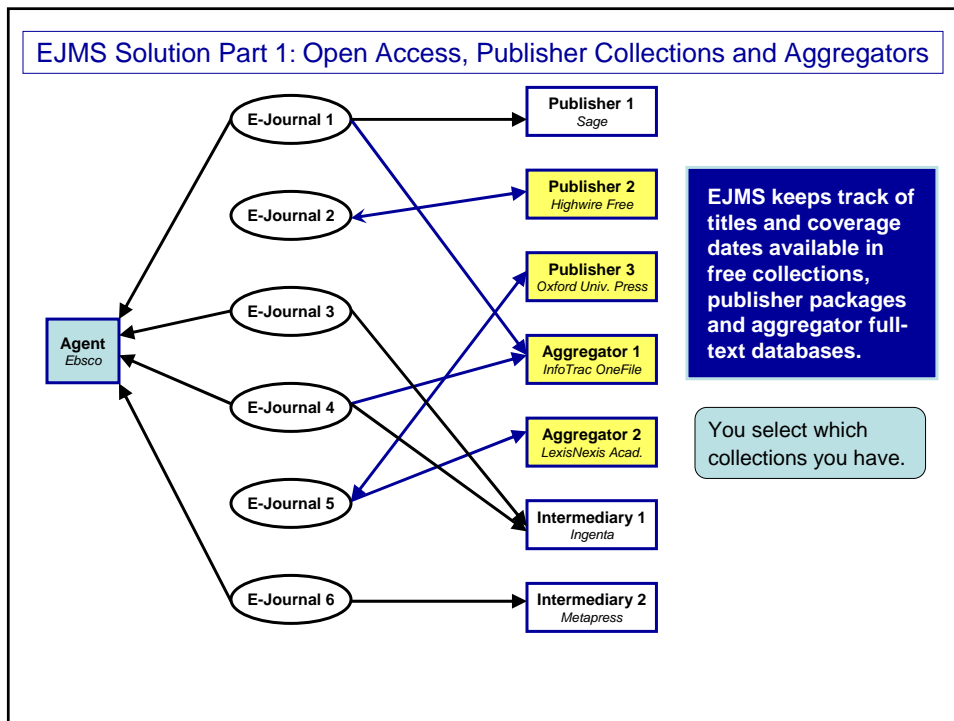
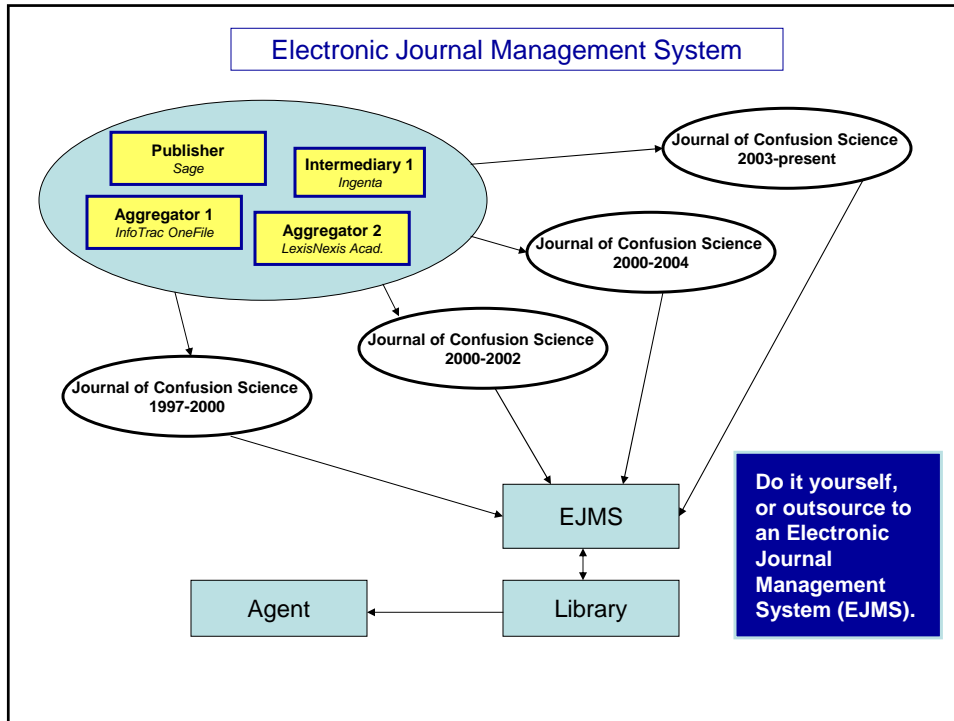
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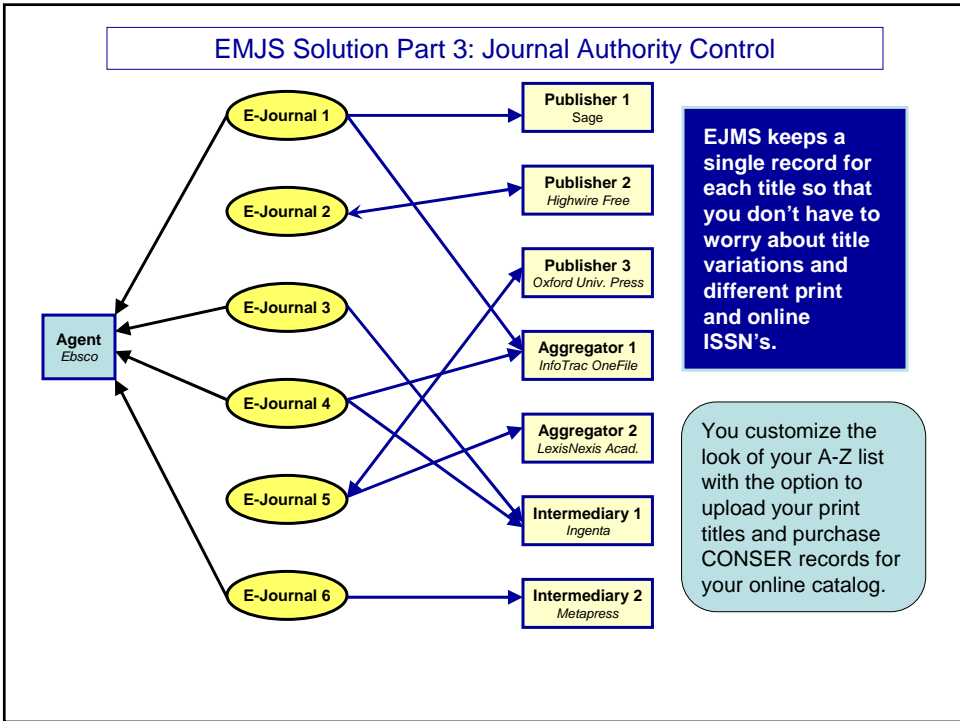
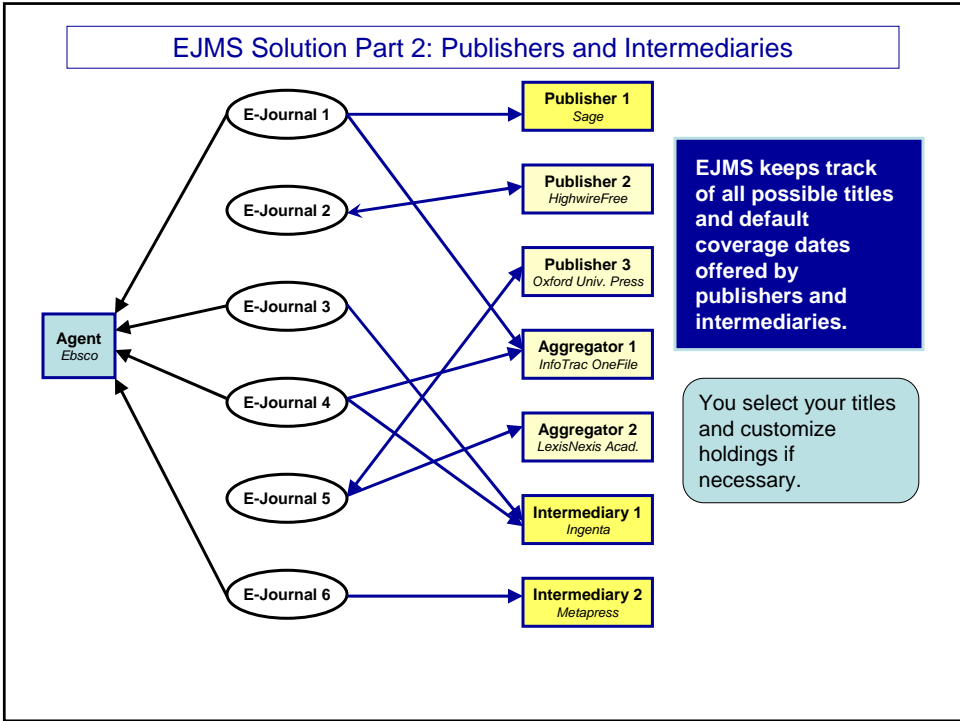


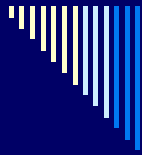








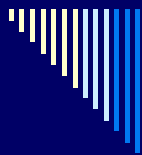




## EJMS Basic Services

- Knowledge base of distributors and journals
  - Select entire distributor list or selected titles only
  - Add unique titles not already in knowledge base
  - Edit coverage dates
  - Hosted or local system with updates
- A-Z list searchable by title and ISSN
- Local branding of A-Z user interface
- Option to load ISSN file of print holdings
- Usage statistics

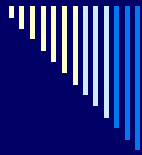
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## Benefits of Hosted EJMS

- Server maintenance and web access is their responsibility
- Knowledge base changes
- Access your account from any Internet location
- Source of MARC records for OPAC
- Basis of vendor integrated suite of products (Link Resolver / ERM / Federated Search)
- Overlap analysis and comparison of database coverage
- Usage and library holdings reports
- Provider technical support assistance
- User-friendly interface
- Integrate local library holdings

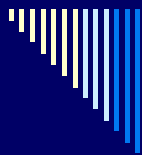
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## Disadvantages of Hosted EJMS

- ❑ Accuracy of knowledge base depends on provider
- ❑ Customization and branding may be limited
- ❑ What happens to your data if you stop service or switch providers?
- ❑ Financial viability of provider (JournalWebCite)
- ❑ Variable quality of provider-supplied MARC records
- ❑ Updating journal holdings information
- ❑ Limited to contracted content providers

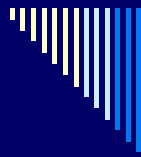
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## Issues for Managing E-Journals

- ❑ Staffing
- ❑ Technical skills
- ❑ User education
- ❑ Electronic preservation (archival access)

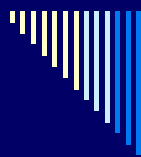
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## EJMS Workflow Issues

- Scheduled
  - Enter new online subscriptions (annual)
  - Update print holdings (annual)
  - Load updated MARC records (monthly)
  - Usage statistics (monthly)
- As needed
  - Enter new databases and collections
  - Enter distributor or publisher changes related to your subscriptions
  - Troubleshoot access errors reported by patrons
  - Overlap analysis for collection development

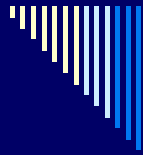
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## The Future

- User demand and expectation
- Increase in electronic journal production
- 24-7 access
- Cost (archival access and current subscriptions)
- Maintenance, maintenance, maintenance
- Staffing requirements and more technical skills
- Open Access Initiative
- Reader preference for traditional format
- Tracking journal usage
- Research and development by EJMS providers

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## Questions and Comments

□ Thank you!

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