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Chapter 20

E-Journal Management in the Small Academic Library

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INTRODUCTION

Students and faculty expect electronic access to every information resource. Pressured to meet the research needs of distance learning students, libraries investigate online options for providing access to entire journal collections. At the same time, availability and accessibility of a vast array of titles stimulate patron awareness of new resources and may encourage use of the print journal collection.¹

Library staff new to e-journal management quickly begin to understand the blessings and curses of this now commonplace format. The innumerable benefits for library users come with challenging access and management issues for library staff. E-collections are not necessarily cheaper than print collections, so how does one finance the development of e-collections? How does e-journal collection management dovetail with print collection management? How will library patrons confronted with multiple databases and search interfaces locate a particular journal title? In this chapter, we answer these questions from the vantage point of the small, private academic setting of the Concordia University Library in Portland, Oregon.

This chapter is organized around a description of the selection, acquisition, access, and management practices and processes that were

confronted by the Concordia University Library as it went through development of an e-journal collection. These topics are covered for each of the four types of e-journals that were identified:

- print journals with online access (print-plus-online);
- journal aggregator databases;
- single e-journal subscriptions; and
- open access (OA) journals.

However, before delving into the details of each of these e-journal groupings, it is worthwhile to look first at the forces driving e-journal selection, acquisition, access, and management at Concordia University, the library's available personnel, how these e-collections are being financed, and overall access issues.

THE DRIVE TOWARD E-JOURNALS

Concordia University, Portland (CU) is a small, rapidly growing institution with over 1,600 undergraduate and graduate students and 137 faculty. The CU Library, which includes the main library, a science library, the Northwest Center for Children's Literature, and an annex facility, supports the curriculum taught at the main campus and satellite campuses in three other locations across Oregon. Approximately 40 percent of the student body is residential, 20 percent participate in the university's distance programs, and the remainder live among the 2 million inhabitants of the metropolitan area and commute to campus in northeast Portland for the bulk of their course load.

In 2003, CU opened several satellite campuses across Oregon. The library was charged to provide equivalent access and services to these students without the benefit of on-site staff or facilities and without additional funding. Providing online access to resources appeared to be the only mechanism available to support the curricular research needs of this student population, and the library staff began a systematic review of all its print and online resources.

A second impetus to increase the e-journal collection was a lack of shelving space, not only for traditional print journal collections but also for books. To improve the library's depth of support for the institution's historical liberal arts core curriculum, an aggressive retrospective collection development program has also been underway

over the last three years, compounding the already tight shelf space in the main library. To accommodate the expanding book collection, approximately 60 percent of the print journal collection was moved to off-site storage near campus in 2003. Journals moved into storage include those to which the Library no longer subscribed and issues older than three years for titles that continue to be received. This off-site storage solution is intended to be temporary since the building of a new library is scheduled to begin in 2007. The stored journal volumes will be moved to the new facility and housed in compact shelving once the building is completed. Although building an e-journal collection helps alleviate current space issues, even after the building is completed, efforts to acquire and maintain e-journal collections will continue in order to support the growing off-site programs.

PERSONNEL

The staff of the CU Library includes the University Librarian (Library Director), one Reference and Instruction Librarian, one Access Services Librarian, a 0.5 FTE Circulation Manager, a 0.25 FTE Cataloger, and a Science Library Supervisor. The CU Library does not have a formal e-resource selection committee. Owing to the small library staff and the collegial nature of the Concordia academic community, all librarians and affected department faculty are involved in the selection and decision-making process, as new curricular information needs arise. Constant communication among library staff and faculty fosters inclusive involvement in decision making at all levels of e-journal management.

FUNDING E-JOURNAL COLLECTIONS

With a stagnant budget, an unfortunately common scenario among academic libraries, the staff was challenged to conjure creative means of funding the new e-journal collections. A thorough review of the library's current online resources resulted in the cancellation of several licenses and the selection of more appropriate and cost-effective aggregated online periodical collections chosen specifically because of their curricular support for the courses being taught.

This exchange of databases, however, still did not provide sufficient support of the students' curricular research needs. A course-by-course review of the university catalog revealed that additional full text periodical databases would be needed to provide appropriate research support for the current curriculum. A title-by-title review of those journals subscribed to through EBSCO revealed that out of the 256 print titles, 178 were available through at least one online aggregator to which the library already subscribed. Each of these print titles was scrutinized to determine the following: its applicability to support of the curriculum; whether or not it was being used by the students;² how that particular publication was used by the students; and cost.

Several titles no longer supported the curriculum being taught; a few more were not being used at all. In consultation with the Deans of each college, the Library Director determined that some periodicals were too expensive to justify the rare usage that they received. Half a dozen titles with color photographs and diagrams were being used heavily by student teachers and it was decided that, even though they were duplicated by one of the online journal aggregators, they would not be canceled. CU is also a depository for publications of Concordia Publishing House (CPH), and so library staff have decided to keep the print titles from this publisher even though they may be available through one of the online full text aggregators.

In all, 157 print journal subscriptions were canceled in 2004 and 2005, representing approximately 61 percent of the library's total print subscriptions. The library's microform collection was reviewed using similar criteria in 2004 and 2005, resulting in the cancellation of twenty-two microform journal subscriptions, representing approximately 45 percent of the total microform subscriptions. The resulting savings provided funding for the licensing of additional journal aggregator databases that increased the number of unique full text e-journal titles to which CU Library users have access from around 3,500 to over 22,000.

ACCESS

The CU Library has acquired access to full text e-journals through four subscription methods: online access that comes with a print journal, aggregated journal databases, direct online journal subscriptions,

and OA journals. The e-journals that come with a print subscription are grouped by the vendor providing the print subscriptions (e.g., Electronic Journals Service, or EJS, for those journals that are part of our EBSCO print journal contract) and direct online journals by their publisher (e.g., ScienceDirect for journals published by Elsevier). Counting these groups along with aggregator databases and OA providers, the library's e-journals collection draws from over fifty sources.

The library's Web pages (<http://www.cu-portland.edu/library>) provide access to the majority of e-journals. A link to the databases page appears prominently in the center of the home page and in the navigation bar on the left side of all pages. The CU librarians have also created online discipline-specific subject guides that link to groupings of e-journals related to that discipline. Access to all of these e-journals is authenticated by IP address through a proxy server. Off-campus patrons must log in using their university network user name and password. Students are accustomed to logging into the university's intranet for registration and other university information, so this is a convenient way to manage access. All information literacy sessions include instructions about how to access the e-journal collections.

Owing to the limited size of the staff, it was decided that maintaining e-journal holdings in the online catalog would not be practical for most journals. For those e-journals that are used frequently, a link was added to the MARC 856 field (Electronic Location and Access, with the URL) of the holdings record for that title. The currency of links present in catalog records is checked periodically from the online public access catalog (OPAC). The library uses Serials Solutions as the vendor to manage online access to the e-journal collections.

PRINT JOURNALS WITH ONLINE ACCESS

Selection

The CU Library continues to subscribe to print journals that provide core support to the university's curricula and are either not available online or available only through aggregator databases to which the university does not subscribe. On rare occasions, journal usage patterns have identified a title that needs to be available in print even though it is available through a full text aggregator. One such example

is *Teaching K-8* where the students prefer to flip through the full color pages in print.

Acquisition and Access

Most print titles to which the Library subscribes are purchased through EBSCO; only a handful are publisher-direct subscriptions. The EBSCO invoice identifies those titles that include online access (currently, about 20 percent). The Concordia Library authenticates appropriate users of its online resources by checking whether the computer being used is within the university's IP range. For those users accessing these resources from off-campus, a proxy server is used for authentication. For most print journals that offer online access as well, the electronic content resides on the publisher's Web site and a user must be authenticated to access it. Generally, authentication involves establishing a user name and password for that particular site. In the case of *JAMA*, for example, the publisher could authenticate via IP address, but only to three dedicated IPs. As the campus network dynamically generates IPs within a specific range, this means of authentication would not work. Rather than investing time and effort to set up user names and passwords for specific titles, it was decided to forgo online access when a password is required. Even though online access was available through our print subscription, the way in which the content was provided deterred us from providing access to the online version of many titles such as this.

Management

For print subscriptions that include online access, ongoing staff management is a necessity. The CU Library uses EBSCO's EJS, an e-journals gateway and management tool where IP-authenticated links to online titles reside. To avoid confusion for library users, it was decided not to include in EJS those online journals for which passwords are required. At least annually, the journal links on the EJS are tested to determine whether or not they are still active.

E-journal management tools from Serials Solutions have been instrumental in collocating e-journal and print journal holdings information. In 2004, after review of several online journal management software systems, the library chose to implement two Serials Solutions modules: Access and Management Suite (AMS) and Article Linker.

AMS is a search interface that allows users to retrieve journal titles and holdings information from disparate databases through one interface (an A-to-Z list of journal titles). When a journal title is retrieved, a link to the databases that include full text coverage of that title is displayed along with the dates of coverage. The holdings of the library's small print and microform collections have also been integrated into this system so that the user can locate them if electronic access is not available. Using AMS, one can also browse journal titles by subject. Article Linker is an OpenURL link resolver that enables patrons to find and link to specific items held anywhere in the collection.

A helpful feature of AMS is that the library is able to manage e-journal titles manually. Thus, when it is determined a print-plus-online title is not actually available from EJS, that title can be removed from our Serials Solutions AMS list. Although this is an extra step, from a management perspective the ability to change content on the AMS list independently allows us to keep our full text holdings information current.

JOURNAL AGGREGATOR DATABASES

Selection

The electronic-only journal collection expanded dramatically as curriculum-driven information needs were evaluated. A review of course descriptions and syllabi helped to determine the resources that are needed to support the research needs of the course content. All librarians are involved in reviewing and selecting journal aggregator databases. Since the librarians work closely with faculty and have access to each syllabus, faculty input on journal aggregator trials is sought only when a question arises about the extent of usage a product might have in their coursework. Faculty requests for specific journal titles were also considered during this evaluation process. (It should be noted that while this review of extant courses was underway, a new undergraduate nursing program was introduced on campus that required the acquisition of journals in the health sciences that had not previously been required. Medical journals, whether print or electronic, are some of the most expensive, and so selection of those was done with great care in consultation with members of the new nursing faculty.)

Avoiding duplication of content among the journal aggregator databases is difficult. Serials Solutions was used to assist with this effort. Using the AMS product it is possible to compare the unique content of one journal aggregator, title by title including date ranges, against another aggregator that is under consideration. It is also possible to do this comparison against the journal aggregators to which the library already subscribes. Careful consideration was given to balance current content (to support those courses for which currency is critical) and retrospective content (to support courses for which historical collections are important). Some overlap will undoubtedly occur, but minimizing the overlap is a goal of this process. For those publications determined to be unique among a set of journal aggregators, personal judgment is still necessary to weigh the value of a particular set of publications against another.

E-journal collections are a cost-effective way to add substantial content without breaking the budget. Adding electronic-only journals has allowed the CU Library to rapidly expand the collection in subject areas that were print-journal poor. Librarians selected only collections that could provide access and authentication by IP address range.

Acquisition and Access

As noted earlier, the majority of the e-journals to which Concordia Library users have access are delivered through journal aggregators; fewer than a dozen titles have been purchased directly from publishers. EBSCO has the statewide contract for Oregon, and consequently the largest numbers of e-journals to which Concordia students have access are hosted on the EBSCO platform. Using consortial agreements with the Orbis Cascade Alliance (OC), the Online Private Academic Library Link (OPALL), the Online Computer Library Center (OCLC), and the Bibliographical Center for Research (BCR), the Concordia Library has also purchased aggregator databases from Ovid, ProQuest, Elsevier, Chadwyck-Healey, Newsbank, SBRnet, JSTOR, LexisNexis, FirstSearch, and Facts on File.

Concordia Library users access the content of the journal aggregator databases in a variety of ways. On the library home page, there is a link to a list of all of the databases to which the library subscribes as well as a drop-down "quick link" directly to the database. There is also

a link to a set of discipline- and topic-specific subject guides that the librarians have created. Each of these guides, as applicable, has a section called “Journals and Journal Articles.” Links to the best journal aggregator databases for the respective discipline/topic are provided there. A third link to the content of the journal aggregators is provided through the “Journals List” link—one of the navigation links on all CU Library Web pages. This link takes users to Concordia’s A-to-Z journal list where they can identify which database contains the journal title being sought as well as the date ranges available.

Management

Serials Solutions has become an integral partner in the management of the Concordia Library’s e-journals collections. The AMS tool enables the librarians to evaluate the journal aggregator collections internally. Through its A-to-Z component, the AMS tool provides library users with title-by-title access to the e-journals contained in each of the journal aggregator databases. The Article Linker tool enables the database users to almost seamlessly move from one journal aggregator database to another, without even noticing that they have left the original database in which the search was started.

SINGLE E-JOURNAL SUBSCRIPTIONS

Selection

As noted earlier, the CU Library has subscribed to only a handful of e-journals on a title-by-title basis. The addition of a nursing curriculum to the campus brought about the need for several health care titles that were not available through journal aggregator databases, or for which obtaining the entire contents of a journal aggregator’s database offering was cost prohibitive when only a few titles were needed.

Acquisition and Access

Acquisition of direct e-journal subscriptions on a title-by-title basis was arranged directly with the publisher and made available to library users through the platforms of Ovid (journals@ovid) or Elsevier (ScienceDirect).

Management

The flexibility of the AMS module enables the addition of individual titles to those accessible through the A-to-Z title list. These titles are also accessible through the Article Linker product so that the library user's access to them is fairly seamless, once a citation to the article is located through one of the journal aggregator's indexing systems.

OPEN ACCESS JOURNALS

Selection

CU librarians generally discover OA e-journals serendipitously rather than by active intent. Faculty colleagues and listservs, such as Electronic Resources in Libraries (ERIL-L), are valuable sources of OA titles. Librarians have also identified OA journals on the Internet while assisting patrons in locating resources on their research topics. Before access is provided to a particular title, librarians ask the following questions:

- Does the journal come from a reputable organization or publishing house?
- Has it been available free of charge online for at least a year?
- Is it indexed in any of the databases to which the library already subscribes?
- Does content fill an information need in the institution's programs or curriculum?
- Has a faculty member requested that the library subscribe to it?

If the answer to all these questions is yes, the title is added to our e-journals list and managed in the same manner as the single subscriptions.

Acquisition and Access

Once an OA journal or journal collection has been identified and evaluated for its support of the curriculum taught at Concordia, it is added to the list of journals or journal collections that Serials Solutions maintains. Library users directly access OA journals and journal

collections through the A-to-Z list. Article Linker also provides access to any of these OA journals that are indexed through one of the journal aggregator databases to which the university subscribes.

Management

Management of OA journals is also done through the AMS product. As new OA journals and journal collections are identified and evaluated for their support of the CU curriculum, they are added to the list.

REPERCUSSIONS OF CANCELING PRINT JOURNALS

Moving to a predominantly e-journals environment is not without perils. One hurdle that had to be overcome early in the process of canceling print subscriptions was educating faculty on how to access specific journal titles online. The library had previously routed several print titles to faculty, and faculty did not want to lose the service of having notification of and access to these professional resources. To address this change, librarians met with faculty one-on-one to instruct them on how to retrieve routed titles electronically and set up customized alerts to maintain access on a continuous basis.

Librarians are aware also of the dangers of relying on an aggregator to provide access to a particular title in perpetuity. To ensure that print titles canceled because they were available online are still available online, the list of canceled titles is checked annually to verify continued access. The library continues to receive twenty-six titles in microfiche to ensure archival access.

CONCLUSION

To meet patron expectations and the research needs of learners at a distance, the CU Library has focused a great deal of time and energy on identifying, acquiring, arranging for access to, and managing e-journals over the past three years. Although the rationale and criteria used to select e-journals and print journals are similar, management of the two formats differs significantly.

As e-journals cannot be physically arranged together, the CU Library uses online tools, such as Serials Solutions AMS and Web-based subject guides, to collocate electronic collections. Providing multiple accession points to e-journals increases staff workload. When a journal aggregator database is added to or removed from the collection, links on the Web-based subject guides must be updated manually and Serials Solutions notified. The additional workload at the CU Library is insignificant relative to the return: patrons have access to over 22,000 journals, compared with approximately 400 journal titles remaining in the print collection. Vigilance is required to ensure that titles core to the collection are available continuously because content of most e-journal collections is dynamic, particularly in journal aggregator databases. Maintenance of e-journals available with a print subscription is time intensive: for each title, it is necessary to investigate the mode of access. For this reason, librarians have decided to provide access through the print subscription and not to make these few titles available electronically. Access to archival collections is a significant challenge for all libraries; permanent access to e-journal content is not guaranteed by many journal aggregators or publishers. In response to library needs, some major publishers, such as Elsevier and Springer-Verlag, have adopted perpetual access policies.³ Libraries need to push for these policies to become industry standards so the need to maintain print collections decreases.

Precipitated by the need to provide material support to new courses being taught at distant campuses, the addition of e-journals to the Concordia Library's collections necessitated the deselection of print journals in order to pay for the new electronic access. At first glance, this loss of print journals may seem to have had a negative impact on the availability of materials necessary to support the remainder of the curriculum being taught at Concordia. On the contrary, several studies of print journal usage at academic libraries that added e-journals to their collections documented a decline in the use of the print journal collection anyway.⁴ Evidence of this practice was demonstrated when the librarians began spending more time assisting users with the new e-journal databases than guiding them to print resources.

This change in journal usage patterns by students also has the potential to impact staffing levels in the library. At a large institution, cancellation of print titles may also result in a significant decrease in

staffing levels because fewer journals need to be physically processed each day. At the CU Library, however, this time saving is most likely negligible because of initial low staffing levels. The staff that had been responsible for receiving, processing, and claiming print journal titles is now needed to maintain electronic collections.

To improve patron search efficiency and accessibility to e-journals, the CU Library staff plans to implement in the near future a federated search engine, that is, a software program that simultaneously searches multiple databases, and will simplify the research process by allowing patrons to locate materials in the OPAC, in journal aggregator databases, and on the Web simultaneously. In spite of their somewhat complex management, e-journals are a cost-effective way for small libraries to provide thousands of resources to all patrons, whether on campus or at a distance.

NOTES

1. Eileen E. Brady, Sarah K. McCord, and Betty Galbraith, "Print versus Electronic Journal Use in Three Sci/Tech Disciplines: The Cultural Shift in Process," *College and Research Libraries* 67, no. 4 (2006): 354-363.

2. Statistics on print journal usage had been gathered for several semesters prior to the time since these decisions were made.

3. Suzetta Burrows, "A Review of Electronic Journal Acquisition, Management, and Use in Health Sciences Libraries," *Journal of the Medical Library Association* 94, no. 1 (January 2006): 72.

4. *Ibid.*, 67-74.