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## Best Practices for Presentation of E-Journals

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## Best Practices for Presentation of E-Journals

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### Abstract:

The publishers and providers of e-journals take great pride in the diverse designs of their websites. Yet how these websites present, identify, and link together the publications that they display can make the end-user task of discovering articles and accessing them easy, frustrating, or completely fruitless. In 2010, NISO established a workgroup to draft recommended practice guidelines for the presentation and identification of e-journals (PIE-J) to help publishers ensure that e-journal content can be reliably discovered, cited, and accessed by users over time. The recommended practice guidelines emphasize the need to retain the original title and citation information across all journal formats and provide constructive advice to help with the presentation of born-digital content as well as to support the continued digitization of content from journals originally published only in print. The guidelines will be presented to attendees of this session, along with information on how the guidelines were drafted and how the guidelines relate to other standards and best practices.

In an article in *Information Standards Quarterly* published in spring 2009, Reynolds and Hepfer describe a scenario in which a frustrated undergraduate working on a writing assignment faces various challenges in her search for the full text of a specific article starting with a standard, abbreviated citation to that article.<sup>i</sup> A great deal of the difficulty that the fictional student encounters stems from a lack of standardization in the way in which e-journals are presented. Various policies and practices have contributed to creating a sometimes overwhelmingly complex online environment for journal content. Since 1971, most U.S. libraries have followed cataloging rules that require each significantly changed title of a journal to be cataloged as a separate record; the result is that libraries effectively consider a changed title to have become a new journal for identification, control, and inventory purposes. Often the new title has a different ISSN from the old title. Editors may feel content is more marketable if it is presented under the current journal title, and may not reference historical titles. Product managers and website designers may seek a simpler and more elegant arrangement than breaking the content into the various pieces that place it under (multiple) changed titles. Not all content providers either think to consult librarians or employ librarians to advise on content presentation.

In addition to problems with presentation of journal content on the web for readers, there are also difficulties with link resolvers used by academic and

other institutions to connect users with content. Typically, these link resolvers help guide readers to journal articles by using the metadata in Open URLs (ANSI/NISO Z39.88). If the source citation (as represented by OpenURL metadata) and the knowledge-base identify the same content with different journal titles and ISSN, then the corresponding target links will not be offered to the user. Content that a library has paid for will not be served to a researcher, even though that content has been licensed and should be available to its users. Further, even when guided to the appropriate content by the link resolver, researchers may be confused by seeing one title in a reference and landing on a page that appears to be an entirely different title.



In order to provide publishers and other content providers with practical guidance, the National Information Standards Organization (NISO) convened a working group on Recommended Practices for the Presentation and Identification of E-Journals (PIE-J)<sup>ii</sup>. PIE-J is jointly headed by Bob Boissy, Director, Network Sales, Springer ([Robert.Boissy@springer.com](mailto:Robert.Boissy@springer.com))

and Cindy Hepfer, Head, Electronic Periodicals Management & Continuing Resources Cataloging, University at Buffalo (SUNY) ([HSLcindy@buffalo.edu](mailto:HSLcindy@buffalo.edu)).

Members of the workgroup are drawn from a variety of scholarly publishing organizations, serials vendors and academic libraries. The formal charge to the group is shown here:

To develop a Recommended Practice that will provide guidance on the presentation and identification of e-journals, particularly in the areas of title presentation and bibliographic history, accurate use of the ISSN, and citation practice, that will assist publishers, platform providers, abstracting and indexing services, knowledgebase providers, aggregators, and other concerned parties in facilitating online discovery, identification, and access for the publications.

At the time of the 2011 Charleston Conference, the Recommended Practice (RP) document is still in draft format. After a period of public review, the final document will be published on the NISO website at <http://www.niso.org/publications/rp/>. To participate in the public review, interested parties should join the PIE-J mailing list (<http://www.niso.org/lists/piejinfo>) to receive notifications about progress of the RP.

The document will:

- Provide guidance to e-journal publishers and providers to ensure that e-journal content can be reliably discovered, cited, and accessed by users over time.
- Be short and simple.
- Minimize library jargon.

- Benefit all parties involved in scholarly pursuits, including researchers, authors, librarians, online providers, publishers, and other intermediaries.

The RP will NOT cover continuously updated resources (databases, loose-leaf services, many reference works), address website design (except as related to presentation and identification) nor provide overall publishing guidelines.<sup>iii</sup>

The RP document provides best practice guidance on:

- Journal title and citation information
- Title changes and title history
- ISSN
- Enumeration and chronology systems
- Publication information
- Access to content
- Preservation of content digitized from print

Several appendixes will be provided in addition to the RP. These will include a glossary of terms, additional information sources about ISSN and ISSN centers, guidance on determining titles and title histories, reference for understanding DOI and CrossRef, a list of recommended reading, and examples of good practice in e-journal presentation.

After publication of the RP document (currently scheduled for early 2012) NISO will form a standing committee to encourage adoption of the RP in the community. The RP guidelines will also be reviewed after a period of about two years following publication.

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<sup>i</sup> Reynolds, R. R. and Hepfer, C. "In Search of Best Practices in the Presentation of E-Journals," *Information Standards Quarterly (ISQ)*, Spring 2009, v. 21, no. 2, pp. 18-24, Accessed November 30, 2011 <http://www.niso.org/publications/isq/2009/v21n2>

<sup>ii</sup> For documents, a full list of working group members, information on joining the PIE-J interest group and related information, visit the PIE-J workroom <http://www.niso.org/workrooms/piej>

<sup>iii</sup> A number of other related initiatives and standards which will address at least some of these areas include:

*NISO IOTA (Improving OpenURLs Through Analytics) Working Group*, Accessed November 30, 2011,

<http://www.niso.org/workrooms/openurlquality>

*ISO 8: Presentation of Periodicals*, Accessed November 30, 2011, [http://www.iso.org/iso/catalogue\\_detail.htm?csnumber=3585](http://www.iso.org/iso/catalogue_detail.htm?csnumber=3585)

*KBART (Phases I and II)*, Accessed November 30, 2011, <http://www.niso.org/publications/rp/RP-2010-09.pdf>,

<http://www.niso.org/workrooms/kbart>

*Supplemental Journal Article Materials Project*, Accessed November 30, 2011, <http://www.niso.org/workrooms/supplemental>