庆祝中国图书馆学会成立 25 周年！

庆祝苏州图书馆 90 华诞！

欢迎莅临

中国图书馆学会 2004 年年会

清华同方光盘股份有限公司

恭祝：

中国图书馆学会成立 25 周年纪念活动圆满成功！

向第二届图书馆学情报学学术成果奖获奖者、《我的图书馆情缘》征文优秀作品获奖者和第二届全国图书馆系统书画摄影展优秀作品获奖者表示衷心祝贺！

7. 数字环境中的电子期刊：问题与未来的趋势

Jian Wang 女士（合作者 Arthur Hendricks）（美国华美图书馆员协会）

第六分会场：图书馆数字化与现代化服务之二——文献资源建设研究

时　间：2004年7月25日　14：30－16：30

地　点：苏州图书馆培训楼104室

主持人：**倪晓建**（中国图书馆学会学术研究委员会副主任、首都图书馆馆长、教授）

1. 网络时代，专业图书馆如何“专业”？

   韩　兵（江苏省社会科学院图书馆副馆长、副研究馆员）

2. 百年来编目的发展与创新

   曾程双修（美国华人图书馆员协会执行理事长　前美国加州大学，尔湾校区图书馆期刊编目部主任）

3. 电子资源的集团采购：21世纪图书馆的必然选择

   胡永生（武汉大学图书馆，武汉大学信息管理学院硕士研究生）

4. 面向创新教育的大学图书馆信息资源建设与服务模式研究

   王彰红（重庆大学图书馆系统与数字资源部）

5. 中国少数民族文字报刊数字化建设探讨

   王学艳（大连民族学院图书馆副研究馆员）

第七分会场：图书馆数字化与现代化服务之三——信息咨询服务研究

时　间：2004年7月25日　14：30－16：30

地　点：苏州图书馆培训楼103室

主　办：用户研究与服务专业委员会

主持人：**王世伟**（上海图书馆教授、党委副书记）

卢海燕（国家图书馆研究馆员、参考研究辅导部主任）

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zou_gou@hotmail.com Printed: Monday, September 27, 2004 6:59 PM

From : Sally Tseng <sctseng888@yahoo.com>

Sent : Thursday, September 9, 2004 12:37 AM

To : Cheng Huanwen <cheng@zsu.edu.cn>

CC : teresa marquez <tmarquez@unm.edu>, "Jian (Jan) Wang" <jian@pdx.edu>, c wang <cwang@uog9.uog.edu>, karen Wei <kwei@uiuc.edu>, Arthur Hendricks <bvah@pdx.edu>

Subject : Re: Paper to be published

Dear Huanwen:

Thank you for your message and the information regarding the 4 papers of CALA members presented at the 2004 CSLS Conference in Suzhou. I am copying the authors on this message and their email addresses are in the cc line. I am sure they will be very excited that, under your able editorship, their papers will be published by one of the top three library journals--Journal of Library and Information by China Academy of Sciences.

The authors' names, addresses and emails are listed below in case you need to contact them:

1. Dr. Chih Wang

Professor of Library Science

University of Guam, Learning Resources

P.O. Box 5381, UOG Station

Mangilao, Guam 96923,

USA

email: "c wang" <cwang@uog9.uog.edu>,

2. Ms. Maria Teresa Marquez

Center for Southwest Research

University of New Mexico

Home Address:

309 Wellesley Dr. SE

Albuquerque, New Mexico 87106 U.S.A.

email: "teresa marquez" <tmarquez@unm.edu>,

3a. Ms. Jian Wang:

Serials Catalog Librarian

Serials/Documents Cataloging Coordinator

Portland State University Library

Post Office Box 1151, Portland, Oregon 97207-1151

email: "Jian (Jan) Wang"<jian@pdx.edu>,

3b. Mr. Authur Hendricks

Reference Librarian, Information Consultant, &

Systems Support Specialist

Portland State University Library

951 SW Hall, Portland, Oregon 97207-1151

email: "Arthur Hendricks" <bvah@pdx.edu>,
4. Ms. Karen T. Wei
Head, Asian Library & Coordinator, Area Studies Division

University of Illinois at Urbana-Champaign

1408 W. Gregory Dr.

Urbana, IL 61801

email: "karen Wei" kwei@uiuc.edu

Congratulations to Chi, Teresa, Jian, Author and Karen on this great news!

Director Huanwen Cheng is a scholar, researcher and one of the top library leaders in China. We are very impressed by your works and are very honored to have this opportunity to work with you.

I talked to Teresa regarding the version that should be included in the forthcoming issue. She felt that the Chinese version will benefit more readers in China and would like to ask you to publish the Chinese version. We are very impressed by your simultaneous oral translation at the CSLS Conference for Teresa. You did an excellent and impressive job!

We would like to acknowledge you and your colleague for the translation. Please kindly add your name and your colleague's name to Ms. Maria Teresa Marquez's paper. Thank you very much.

I would like to buy a copy of the issue. Please let me know when it is available. I assume the authors will receive a free copy from the publisher.

Thank you again for your time and efforts. It has been a great pleasure working with you.

Please do not hesitate to let me know if there is any further information I can provide.

Best regards,

Sally

Cheng Huanwen <cheng@zsu.edu.cn> wrote:

> Dear Sally: I will arrange those four papers from CALA by Dr. Wang Chih, Karen Wei, Ms. Maria Teresa Marquez,and Ms. Jian Wang & Mr. Arthur Hendricks to be published in the 12th issue of this year of the Journal of Library and Information, published by the China Academy of Sciences, one of top three library journals in China. As you know, I have a Chinese version of Marquez's paper, I would like to know which version of her paper she likes to be published, English one or Chinese one? As a guest editor of the journal, I will finish my editorial job of this special issue in this or next week. If you have any questions, please do not hesitate to contact me. I would be very grateful if you inform them of this publication information. In addition, please give me their email address so that we will be able to contact them as we have questions. Many thanks. All the b! est, Yours, Huanwen
>
> > ----- Original Message -----
> > **From:** Sally Tseng
> > **To:** Cheng Huanwen
> > **Cc:** teresa marquez ; Jian (Jan) Wang
> > **Sent:** Friday, July 02, 2004 1:21 PM
> > **Subject:** Re: Ms. Marquez's Paper for You and CSLS
> >
> > Dear Huanwen:
> >
> > Many thanks for the good news. I am sure Maria Teresa will be very honored to be a keynote speaker.
> > I'll have another paper for you around July 10. Ms. Jian Wang will **Co-Author**

with Arthur Hendricks on a Paper entitled: **Electronic Journals in the Digital Environment: Issues and Future Trends.** Please also schedule Jian's presentation at the 2004 CSLS Conference. Authur, her co-author, will not attend CSLS Conference this year.

Thank you again for your leadership.

Best regards,

Sally

Cheng Huanwen <cheng@zsu.edu.cn> wrote:

Dear Sally: Thank you very much for sending me the paper by Maria. Of course we have already arranged the three presentations,and Ms. Maria will be a keynote speaker.In addition, I am arranging my colleague to translate the paper into Chinese, and I have arranged an JOurnal to publish it. I am looking forward to meeting you all in Suzhou. All the best. Yours, Huanwen

----- Original Message -----
From: Sally Tseng
To: Cheng Huanwen
Cc: teresa marquez
Sent: Thursday, July 01, 2004 5:16 AM
Subject: Ms. Marquez's Paper for You and CSLS

Dear Huanwen:

I am very pleased to send you a paper entitled "**The Code of Ethics and Librarianship" by Ms. Maria Teresa Marquez** as MS Word document in the attachment. Please take a look when you have time and send us your suggestions. Thank you very much for arranging your colleague to do translation for Teresa at the 2004 CSLS Conference. We appreciate very much your thoughtfulness. It will encourage more American librarians to participate and present papers in China.

Please kindly arrange Dr. Wang Chih, Karen Wei and Ms. Maria Teresa Marquez presentations at the 2004 CSLS Conference to be held in Suzhou, July 23-26. Please also let us know the title of the Journal that will publish these papers after you find a publisher.

Thank you very much for your able assistance. I look forward to the pleasure of seeing you again in July.

Best regards,

Sally

Sally C. Tseng
CALA Executive Director
P.O. Box 4992, Irvine, CA 92616-4992
Phone: 949-552-5615, Fax:
949-857-1988 Email:

Electronic Journals in the Digital Environment: Issues and Future Trends

Jian Wang
Serials Catalog Librarian
Serials/Documents Cataloging Coordinator
Portland State University Library
Post Office Box 1151, Portland, Oregon 97207-1151
Phone: 503-725-4574, Fax: 503-725-5799
E-mail: jian@pdx.edu

Arthur Hendricks
Reference Librarian, Information Consultant, &
Systems Support Specialist
Portland State University Library
951 SW Hall, Portland, Oregon 97207-1151
Phone: 503-725-5879, Fax: 503-725-4524
Email: bvah@pdx.edu

数字环境下的电子杂志——论题及未来趋向

在数字环境下建立和管理电子杂志收藏对图书馆管理员提出了许多挑战。因为电子杂志是以涉及到不同数字格式，新的价格结构和不同登陆限制等多个领域的一种复杂且持续变化的状态存在的。本文旨在强调一些针对电子杂志的新论题，包括它的简史，选择过程，合作购买，许可认证，运作费用，登陆许可，用户支持，使用统计和本印订阅取消等内容。同时本文还讨论了电子杂志的未来趋向，包括电子杂志的全公开化，电子杂志收藏的持续发展，以及管理这一重要学术图书馆藏书的最佳方法。

ABSTRACT:
Building and managing electronic journal collections in the digital environment poses many challenges for librarians, as electronic journals exist in a complex and constantly changing state involving different digital formats, new pricing structures, and various access routes. This paper reviews critical issues that North American libraries face in managing electronic journals, including a brief history, the selection criteria, consortia purchasing, licensing, operational costs, providing access, user support, usage statistics, canceling print subscriptions, and electronic journal archives. Future trends discussed include open access e-journals, and the continuing development of e-journal collections and best practices in managing this essential constituent of academic library collections.

databases. As the size of the consortia increases, the costs to individual libraries may decrease. However, the greater the number of participating libraries, the greater the chance to have conflicts of interest. Individual libraries may lose local control in order to reach group consensus. Sometimes, a consistent collection commitment requires individual libraries to give up a percentage of their budgets for the collective.

Licensing issues

Historically, licenses have been constructed to protect a publisher's own particular interests, in terms of copyright and authorized use. A license is a legal document that states the terms and conditions of the agreement between the library and the publisher. The approach to licensing requirements varies depending on the publisher's own pricing and marketing strategies, which libraries find difficult to accept. Therefore, librarians have to negotiate with the provider to meet their own library's needs. Several organizations have prepared sample licensees and guidelines for libraries negotiating licensees, such as the John Cox licenses at www.licensingmodels.com/. The main criteria to be negotiated involve issues such as legal jurisdiction, copyright and interlibrary loan, definition of authorized users and uses, remote access, perpetual archival access rights, quality and content issues, and remedy periods (Harwood and Alderson, 2004).

It is important that librarians evaluate licensing issues carefully and negotiate to determine that the needs of the library and its users are best met. Users also need to be informed of license restrictions.

Operational costs

Operational costs for managing electronic journals can be steep. Providing title level access to electronic journals via the library OPAC and/or via the library web site's journal lists demands substantial staff time. Costs also include maintaining links, updating holdings data, troubleshooting access problems, providing simultaneous access, providing better linking functionalities, supporting staff training, upgrading the library server, systems, and workstations, providing user support and adding adequate staff. Some libraries seek outside vendors, such as Serials Solutions or TDnet, to help with maintenance tasks, which can be costly, too.

Providing access

Typically, libraries are providing access to electronic journals through their OPACs and/or e-journal web sites. A number of studies have been conducted to determine the status of OPAC access vs. journal lists on the web site. Shemberg (1999) found that 79 percent of ARL libraries and 39 percent of non-ARL libraries offer access to their electronic journals through their OPACs. However, with more libraries adding electronic journals to their online catalogs, Rich and Rabine (2001) discovered that librarians continue to provide access to electronic journals through Web pages, and e-journal Web pages are not disappearing but rather are increasing in size and complexity.

statistics. Efforts to help vendors and libraries standardize their usage data have been made. The International Coalition of Library Consortia (ICOLC) has developed the Guidelines for Statistical Measures of Usage of Web-Based Information Resources (http://www.library.yale.edu/consortia/2001webstats.htm) to assist vendors and the library community for collecting usage statistics for electronic resources. The E-Metrics project is another attempt initiated by the Association of Research Libraries Statistics and Measurement Committee and the ARL Research Library and Management Committee.

Partnerships between libraries and vendors need to be further developed to ensure patrons are well served by electronic journals. Duy (2004) noted much work needs to be done among libraries and vendors to coordinate and standardize the collection and reporting of current usage data, as she reflected on Marchall Breeding's comments:

"Theoretically, the ability to measure access to electronic resources should be greater than traditional resources...Web servers can be programmed to record each and every time an item of content is requested. The obstacles to comprehensive measurement of use tend to be in the realm of coordination and organization, not in technical ability."

Cancellation policy

With increased budget strains, libraries must carefully evaluate the costs and benefits of maintaining subscriptions to one or both formats. Several years ago, a library may have a collection of 80% print journals and 20% online. Today, the numbers have reversed, with electronic collections now comprising 80% of the collection. Many libraries have undergone serials cancellation projects by going through an extensive process. Strategies commonly employed by librarians for serials cuts often include a survey of faculty in hopes of identifying core journals and discussions with faculty to solicit which journals they wish to keep rather than just telling them which titles to cancel.

Suggested considerations to incorporate in a policy regarding print subscription cancellations include license terms, accessibility, archiving, duplication, subject, and user statistics (Rupp-Serrano, et al, 2002).

Archiving issues

Another important challenge that libraries face with electronic journals is archiving. Unlike print journal subscriptions which a library owns and can access permanently, there is no guarantee of long term availability of electronic journals. Access to the journal on the publisher's server is often terminated when the library's subscription is cancelled. The library can no longer access the journal issues covered by the subscription period even though fees were paid for access to those issues. A critical question has been raised as to who and how electronic journal archives are provided. Major concerns include technical proficiency, permanence, location, and trusteeship (Barnes, 1997).

Barnes (1997) indicated all parties including publishers, libraries and information system providers should be involved in addressing the electronic archiving issue. The publishers

Coutts, M. M., 1998, *"Collecting for the researcher in an electronic environment,"* Library Review, 47, 282-289.

Harwood, P. & Alderson,C., 2004, *"Current trends in electronic journal publishing: an agent's unique insight into pricing, licensing, and technological aspects based on proximity to publishers and libraries,"* In Fowler, D.C. E-serials collection management: transitions, trends, and technicalities. Haworth Information Press.

Shemberg, M., et. al., 1999, "Electronic Journals in Academic Libraries: a comparison of ARL and non-ARL libraries," Library Hi Tech, 17, 26-45.

Rich, L. A., & Rabine, J. L., 2001, *"The changing access to electronic journals: a survey of academic library websites revisited,"* Serials Review, 27.

Walker, J., 2002, *"CrossRef and SFX: complementary linking services for libraries,"* New Library World, 103, 83-89.

Sloan, B., 1997, *"Service perspectives for the digital library remote reference services,"* Available at < http://www.lis.uiuc.edu/~b-sloan/e-ref.html>.

Duy, J., 2004, "Usage data: issues and challenges for electronic resource collection management," In Fowler, D.C. E-serials collection management: transitions, trends, and technicalities. Haworth Information Press.

Rupp-Serrano, et al, 2002, *"Canceling print serials in favor of electronic,"* Library Collections, Acquisitions and Technical Services, 26, 369-378.

Barnes, J., 1997, *"Electronic archives: an essential element in complete electronic journals solutions,"* Information Services and Use, 17.

Anderson, R., Apr. 2004, *"Open access in the real world,"* C&RL News, 206.