

Key Issue

PIE-J, Presentation and Identification of E-Journals: what's the point?

"A rose by any other name would smell as sweet." But would you be able to find any information about that rose if it were labeled, 'Rorschach'?

The scholarly article, says Peter Burnhill, co-director of The Keepers Registry, is "the object of desire."¹ Nonetheless, even in today's digital environment, articles are still primarily contained in journals, and citations to articles still include the journal title, volume, issue and page. What happens if the journal title in the citation is absent from the list of journals made available online? The object of desire is not attained. The search has failed. The researcher, the library, the distributor, the aggregator and the publisher have all lost. They have lost time, lost sales, and lost credibility. PIE-J, published in spring 2013 by the National Information Standards Organization (NISO), is a set of recommended practices aimed at preventing these failures.²

Beginning with what is regarded as the first modern journal, *Journal des sçavans*, (now *Journal des savants*), first published in 1665, journal titles were reasonably easy to discern from their covers.³ Over the centuries, the format of the scholarly journal became relatively standardized and included predictably located information such as publisher and place of publication, frequency and other identifying information. Much of that predictability changed with the debut of e-journals in the late 20th century. Understandably, publishers wanted to take advantage of new ways of presenting and displaying their journals. Much experimentation ensued. Formats changed, presentation of titles changed, and expected information became difficult to find or was absent altogether. Serials librarians wanted to work with publishers to develop a standard for e-journals but the timing never seemed right: it was either viewed as too early and innovation might be stifled or too late because new patterns had become well established.

It was only when publishers and aggregators tried to solve one of the perennial challenges of journals – their history of changed titles – that the need for PIE-J became so urgent that NISO formed a working group. Online publishing had made it possible for the first time in journal publishing history to systematically retitling journals that had undergone changes over the years. Some publishers and aggregators began to present all previous content under the journal's current title on web pages and in lists of journals in aggregations. The resulting simplicity was appealing. The inability of researchers and librarians to find articles based on a citation to the original title was devastating. Calls for standards or best practices to recommend against rewriting history in this way were popping up on serials discussion lists and at meetings.

PIE-J work begins

The PIE-J working group was formed in 2010. Of critical importance to its success was the diverse nature of the group, which was co-chaired by a librarian from the University at Buffalo, Cindy Hepfer, and a publisher representative from Springer, Bob Boissy. Although the request to NISO for a working group was initiated by librarians, the librarians did not want to presume to dictate to publishers and vendors how to present their journals and hoped that



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312 all parties in the chain of trade could work together to develop a solution that would benefit everyone. The NISO working group included representation from publishers, subscription agencies, platform providers, CrossRef, the US ISSN Center, an indexing service, as well as archiving and digitizing organizations. Librarian members included both catalogers and reference librarians.

The working group's goal was to address the urgent problem of disappearing former titles but also to provide additional recommended practices that would enable better identification and presentation of information on e-journals. The PIE-J working group focused on specifying end results, such as "Associate all articles, issues, volumes, and dates with the journal title under which they were originally published", rather than specifying the way to achieve that result. Page design, indexing and display issues were left to the discretion of the page owners and their web designers. Recognizing that publishers and others making content available might feel that the recommended practices would be too difficult to implement, the working group included examples drawn from actual online journal sites. The PIE-J document includes an appendix of over 30 examples that illustrate the recommended practices and demonstrate that there are various ways to accomplish the recommendations.

The recommended practices

PIE-J's recommended practices are presented in seven sections:

- Journal Title and Citation Information
- Title Changes and Title History
- ISSN (International Standard Serial Number)
- Enumeration and Chronology Systems
- Publication Information
- Access to Content
- Preservation of Content Digitized from Print.

The recommended practices are also available in brochure form. The full PIE-J document contains additional information in five appendices:

- Examples
- Resources for Title History and ISSN
- ISSN
- CrossRef and DOI
- Related Standards and Recommended Practices.

"... the goal ... should be to provide the researcher with the best and easiest access to content."

What are the main take-home messages of PIE-J? First, "It's all about access". Namely, the goal of publishers, aggregators, distributors and librarians should be to provide the researcher with the best and easiest access to content. Studies have shown that students will give up if they do not find what they are looking for on the first or second try. Next, "Do not try to rewrite history". If title changes happened, then earlier titles are present in citations both in print and on the web. The changes should be acknowledged in title histories, lists of titles covered in aggregations or on websites, and indexes. Additionally, "Tell the truth, the whole truth". In other words, provide full information about the journal's publisher, ISSN, frequency, editors, location of content and other relevant topics. Finally, "If in doubt, don't throw it out". Digitizers should retain as much as possible of the original publication and even retain content, like advertisements, that they might otherwise be tempted to not digitize.

Anticipated benefits of PIE-J

Benefits from following PIE-J should accrue to all in the chain of trade as well as to researchers and the librarians who are assisting them. It is anticipated that publishers, aggregators and distributors will benefit from higher hit rates, more customer satisfaction (or less customer frustration!) and, interestingly, the ability to claim higher title counts in the aggregations they offer. By listing separately each title a journal has held over time, title counts will be higher and these title counts will more accurately mirror how libraries count journal titles. Catalogers will be better able to catalog e-journals because the journals' presentation online will align with how library catalog records are created, namely, each major title change is represented by a separate catalog record. Reference librarians will be able to provide better guidance to researchers because they will be able to help the researcher locate journal articles using citations. OpenURL resolution will work better because journal citations, listings in online databases and aggregations, and library records will all match up better. Finally, researchers, especially students just learning to locate articles, will more often attain the 'object of desire', that formerly elusive article.

"... publishers, aggregators and distributors will benefit from higher hit rates ..."

PIE in the sky?

Is this PIE-J picture of happy publishers, aggregators, librarians and researchers just pie in the sky? While nothing can completely eliminate the challenges posed by presenting, accessing, and describing serials and their articles, PIE-J provides recommendations and information that should help ameliorate some of the most challenging situations – if followed. There's the rub: the information community needs to be made aware of PIE-J, and PIE-J needs to be maintained and publicized. Over the past few years as PIE-J was being developed, presentations were made at conferences such as UKSG, NASIG, ALA and Charleston, at meetings of the Professional/Scholarly Publishing Division of the Association of American Publishers (AAP PSP) and CrossRef, and via a NISO Webinar and open teleconference. In addition to this Key Issues paper, articles have appeared in NISO's *Information Standards Quarterly*⁴ and in a *Serials Review* column⁵. The PIE-J brochure is being distributed with all new ISSN assignments made by the US ISSN Center and librarians have informed PIE-J working group members that they have been bringing PIE-J to the attention of publishers and providers whose websites do not follow PIE-J recommendations. In order to ensure that PIE-J will continue to be publicized and maintained, NISO is in the process of establishing a Standing Committee for this purpose.

"... the information community needs to be made aware of PIE-J ..."

Serials have always been complex but they have become even more complex in the digital environment. Serials will likely always have their share of thorny issues but it is to be hoped that PIE-J will help blunt some of the worst of those thorns.

References and Notes

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- 4 Reynolds, R R and Hepfer, C, In Search of Best Practices for the Presentation of E-Journals, *Information Standards Quarterly*, spring 2009, 21 (2), 18–24. http://www.niso.org/publications/isq/free/FE_E-Journals_Presentation_isq21no2.pdf (accessed 4 September 2013).
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