

Enclosed is background information on the Serials Linking Task Force. We anticipate that there will be an item on the agenda for the February 2002 COLD meeting that will review the efforts of the Serials Linking Task Force' analysis on the feasibility and advisability of a new Link Resolution system for the CSU libraries.

The Serials Linking Task Force

Membership

Charity Hope - San Jose
Mark Langston - Chico
Marvin Pollard - C. O. Co-Chair
Priscilla Peters - Stanislaus
Harold Schleifer - Pomona Co-Chair
Steve Sottong - CSULA
Raye Lynn Thomas – Sonoma

This Task Force was created in December 2001 and reports to COLD through the PHAROS Management Team and has been given the following charge:

Charge:

The **Serials Linking Task Force** will focus on exploring the adoption and implementation of emerging linking standards and technology to provide CSU library users with enhanced access services, primarily to licensed electronic resources. Members of the Task Force will review currently available software and specify the elements of a database that will allow direct linking between serial citations in major online citation databases and available online and locally held print resources. The Task Force will also consider extended service linking to available ILL or document delivery services and online reference resources. The goal will be to integrate this linking technology platform between:

- 1. The Electronic Core Collection [ECC],**
- 2. Other databases offered to CSU libraries by SEIR,**
- 3. Pharos resources and**
- 4. Local resources at the user's home campus.**

Detailed investigation into the functionality of the link resolution technology with relevant citation and full text databases, as well as local ILS and Pharos systems will be a critical part of the work. Equally important will be determining the best way to develop and maintain databases that this system will work against. Ideally the set of meta-data databases will be able to support each library throughout the CSU system and provide maximized benefit to all CSU library users, regardless of their local affiliation.

Background information on the need for a link resolution server for CSU libraries:

Problem Statement

In the last decade the number of licenses that CSU libraries have to electronic article abstracting and indexing databases and publisher's web sites, many with access to full text articles and books, has dramatically increased. CSU libraries are now providing students and faculty with access to a rich collection of electronic resources. Due to the packaging of these electronic products, however, CSU librarians have struggled to provide users with a convenient way to make the best use of these resources. Users eagerly use electronic resources but often do not use them effectively or efficiently because a citation in one index may not contain the link to the full text that is located in a

different electronic resource. Using the many indexing and abstracting services available in the modern university library and then locating the article, when it might be held in a bound volume, microfilm or microfiche format, has always been a challenge to uninitiated library users. The recent addition of, sometimes, duplicate electronic versions of journal literature available through the modern university library has made the effective use of the increasingly important information available in journals even more challenging for all library users.

There are many reasons for the growing complexity:

1. The library's ability to control the electronic journal literature for their users is often confounded by rapidly changing relationships among authors, publishers and information aggregators.
2. Hypertext links on the World Wide Web are notoriously for being broken.
3. The need for each library to provide remote access to licensed information available to local users.
4. User's expectations that information should be readily available online with one click.

Efforts by the CSU to address this situation include:

The Unified Information Access System – PHAROS

A major initiative of the 1994 Strategic plan of the CSU libraries, PHAROS provides a common user interface to the many of the catalogs and databases that CSU libraries offer their users. PHAROS also offers **Hooks-to-Holdings** which allows for **cross database searching**. Cross database searching can be used to resolve an article citation in a local OPAC using a data element in the article citation to display the library's holdings of the journal that contains the article. A similar search can be conducted in a union list of serials, such as the one currently hosted by the California Digital Library Periodical Database. When the OPAC or Union List of Serials also contains the URL to the electronic version of the journal the user can be directly linked to the full text. Maintaining working links to currently licensed electronic journals in the library's OPAC or the union list of serials is a significant maintenance effort and this is complicated when remote access to these electronic resources is taken in to consideration.

The Chico List

So named after the library at CSU Chico where a database has been created to keep track of which journals were available electronically and where they could be located was provided to their users. This service has since been expanded to other CSU libraries.

Committee on Bibliographic Access to Journal Packages

This group of CSU librarians has been meeting in the last year to deal with numerous technical aspects of locally building and maintaining, or outsourcing the creation and maintenance of a database of electronic journal titles for the CSU libraries.

Serials Linking Task Force

Combining the effort of the Committee on Bibliographic Access to Journal Packages and the implementation of the June 2000 Strategic Plan, Goal Area A: Strategy 3. (Collection Development and Resource Sharing), the Serials Linking Task Force was established in December 2001.

Potential Solutions

A number of technological and national standards efforts converged in 2001 to create a new niche in the library automation market for a new type of product: **the stand-alone link resolution server**. The link resolution server contains a Knowledgebase that is loaded with meta-data about the physical and electronic journal holdings of the library. This database can then be queried, automatically with one click, using meta-data from an article citation from a commercial vendor's database or local OPAC system. The user is then presented with a new web page that contains a list of locally relevant links to the available electronic full text and or the physical holdings available in that user's local library. If the journal is not available to the library's user, then the user can be presented with the option to request the article through the library's document delivery or interlibrary loan service.

To see an example of a link resolution server in action click here:

<http://www.sfxit.com/trysfx/index.html>

This task force is exploring the following technologies in its evaluation of the feasibility and advisability of adopting a link resolution service for the CSU libraries at this time:

1. OpenURL
2. SFX
3. DOI/Handle System
4. CrossRef