PIE-J: The Presentation & Identification of E-Journals

A Recommended Practice of the National Information Standards Organization

Prepared by the PIE-J Working Group

Approved March 25, 2013
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Foreword

About this Recommended Practice

Citations form the basis for much scholarly research. Connecting researchers with appropriate content is the goal of OpenURL linking and other reference linking systems. Two things are necessary for accurate identification. First, articles must be cited by the title of the journal in which they originally appeared, which may be different from the title the journal currently bears. Second, the correct ISSN must be used in order for link resolution to happen accurately. Despite the widespread use of the DOI® for persistent linking to articles in scholarly publishing, researchers will continue to rely on existing citations and citation elements to access articles in both scholarly and popular periodicals (See Appendix D: CrossRef and DOI).

Unless journal websites accurately and uniformly list all the titles under which content was published, user access to desired content is considerably diminished. No one wins: not the library, the publishers, the vendor, or the researcher. For example, many e-journal publishers and aggregators now place digitized content originally published under an earlier title on the website for the current title, using the current ISSN, thus seriously impeding the researcher's ability to find or identify the content being sought. Entry of journals on websites under the latest title is a significant disservice both to the researcher who cannot find desired content and to the researcher who will cite content incorrectly, thereby causing that content to fail to be located in the future. Far too often, researchers attempting to track down incorrectly cited articles believe the articles are not available because they search under the wrong title. As long as a citation-based system of scholarship predominates, publishers and platform providers will need appropriate guidance as to how best to present their content in order to facilitate access via correct citations.

A proposal was presented to NISO by Cindy Hepfer (Continuing Resources Cataloging Team Leader, Central Technical Services, University at Buffalo, SUNY), Steve Shadle (Serials Access Librarian, University of Washington), Regina Reynolds (head of the U.S. ISSN Center at the Library of Congress), Hien Nguyen (CONSER Specialist, Library of Congress) and Les Hawkins (CONSER Program Coordinator, Library of Congress) to develop a recommended practice to address these issues. The proposal was approved by the NISO Business Information Topic Committee in February 2010.

This Recommended Practice was developed in order to provide guidance on the presentation of e-journals—particularly in the areas of title presentation, accurate use of ISSN, and citation practices—to publishers and platform providers as well as to solve some long-standing concerns of serials librarians.
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Section 1: Introduction

1.1 Purpose and Scope

The recommended practice guidelines presented in this document offer guidance to e-journal publishers and providers that will help ensure that e-journal content can be reliably discovered, cited, and accessed by users over time.

Electronic journals (e-journals) are a critical component of the global scholarly infrastructure. As is the case with print journals, the contents of e-journals and their related metadata become part of the historical scholarly record. Citations to articles in print journals, and now in e-journals, form the basis for much scholarly research.

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’s task of discovering articles and accessing them easy, frustrating, or completely fruitless. The issues that are involved have been well summarized in “In Search of Best Practices for the Presentation of E-Journals” (Regina Romano Reynolds and Cindy Hepfer, Information Standards Quarterly, v. 21, issue 2 (Spring 2009), pp. 18-24).

The NISO PIE-J Working Group’s goal is to communicate guidelines that are short and simple, incorporate a minimum of jargon, and provide clear examples of good presentation of online journal content.

The recommended practice guidelines address the following:

- Retention of title and citation information under which articles were originally published.
- Display of title histories, including information relating to title changes and related metadata.
- Display of correct ISSN for different formats and for changed titles.
- Retention and display of vital publication information across the history of a journal, including publisher names; clear numbering and dates; editors, editorial boards, and sponsoring organizations; and frequency of publication.
- Graphic design and inclusion of information that allows easy access to all content.
- Special considerations for retroactive digitization.

The presentation of e-content is a broad and detailed topic, many aspects of which are not covered in these recommendations. To achieve the working group’s goal of enabling e-journal content to be reliably discovered, cited, and accessed by users over time, these recommended practices have a deliberately narrow focus on e-journals—whether born digital or retroactively digitized—and on only those elements of an e-journal that relate to the presentation of title information and supporting metadata, plus practices related to title identification and content access over time.

Specifically, the recommended practices do not address or apply to:

- Content that is continuously updated, i.e., “integrating resources” such as databases, loose leaf services, many reference works, and most websites. The focus of integrating resources is to present current content rather than to provide long-term discovery of and access to earlier content.
- Many aspects of journal website design, unless the practices relate to proper title presentation and journal history or enable ready access to content.
• Many overall aspects of how a journal should be published.
  (Guidelines on publishing scholarly journals and other periodicals are found in ISO 8:1977, *Presentation of Periodicals*.)

• While Section 508 (of the U.S. Rehabilitation Act) standards on Web accessibility are not discussed in PIE-J, publishers and providers should consider Web accessibility in overall website design. For more information, see: http://www.section508.gov/index.cfm?fuseAction=1998Amend

Application of the recommended practice guidelines offered here will result in improved discovery and access for users. This will benefit researchers, authors, librarians, online providers, and publishers. Authors’ work will not be “lost” due to well-meaning but historically inaccurate citations; researchers will find the information that they need; librarians will have better control of their collections; and online providers and publishers will benefit from increased use of their publications. Not inconsequentially, treating each distinct title in a journal’s history as a separate title will result in an increase in the number of titles that publishers can include in their packages and align the counts more closely with the number of titles libraries report having in their collections. Moreover, when all titles in a journal’s history are displayed and researchers can locate them, overall journal usage counts and the possibility of additional citations will increase.

Throughout the recommended practice guidelines, constructive advice is included 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. An appendix of examples is included with an eye towards demonstrating that there are many ways to provide clear and accurate information that will facilitate long-term access to e-journal content.

1.2 Terms and Definitions

The following terms, as used in this recommended practice, have the meanings indicated.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>back matter</td>
<td>Any material printed at the end of the journal, after the main articles. May include bibliography, index, end notes, list of advertisers, reader response card, etc.</td>
</tr>
<tr>
<td>born-digital journal</td>
<td>An e-journal that originated in digital form, even though it may also have been published in print at the same time. Compare to <em>retroactively digitized content</em>.</td>
</tr>
<tr>
<td>chronology</td>
<td>The date(s) used by a publisher to identify a release or range of releases of a serial publication; that is, the cover date.</td>
</tr>
<tr>
<td>citation title</td>
<td>The form of the journal title to be used when citing articles found in a journal.</td>
</tr>
<tr>
<td>current title</td>
<td>The title of a journal that is now in use. See also <em>former title</em> and <em>succeeding title</em>.</td>
</tr>
<tr>
<td>DOI name</td>
<td>A string that specifies a unique object within the DOI system. DOI® is an acronym for digital object identifier. See further references to DOI in Appendix D and Appendix E.</td>
</tr>
<tr>
<td><strong>Term</strong></td>
<td><strong>Definition</strong></td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>e-journal</td>
<td>A journal that can be accessed via electronic transmission or that is delivered by electronic (as opposed to physical) means. Although usually published on the Web, delivery can also be via a mobile device such as an e-reader.</td>
</tr>
<tr>
<td>enumeration</td>
<td>Sequential numeric/alphabetic designation used by a publisher on a multipart or serial unit to identify the individual bibliographic or physical parts and to show the relationship of each part to the bibliographic unit as a whole (e.g., volume and issue, such as “Vol. 4, Iss. 10”). See also <em>chronology</em>.</td>
</tr>
<tr>
<td>former title</td>
<td>A previous title of a journal. Journal titles may change as a result of changes in ownership, scope, or content, as well as splits or mergers. See also <em>succeeding title</em>.</td>
</tr>
<tr>
<td>frequency</td>
<td>The scheduled period of release of issues of a serial publication; e.g., monthly, quarterly.</td>
</tr>
<tr>
<td>front matter</td>
<td>Material that precedes the first page of text, before the main articles. May include the half title, frontispiece (illustration usually facing the first page or title page—more common in books), title page, table of contents, letters to or from the editor, acknowledgements (or list of contributors), list of illustrations, list of tables, names of editors and editorial board members, and masthead information; may also include “header information” or “journal leader,” which usually includes the metadata concerning the journal itself as well as metadata concerning the issue of the journal and the individual article(s).</td>
</tr>
<tr>
<td>ISSN</td>
<td>International standard serial number, a unique identifier for a specific serial or other continuing resource in a defined medium. (ISO 3297)</td>
</tr>
<tr>
<td>ISSN-L</td>
<td>Linking ISSN designated by the ISSN Network to enable collocation or linking among the different media versions of a continuing resource. (ISO 3297)</td>
</tr>
<tr>
<td>link resolver</td>
<td>An automated system that converts citation metadata into one or more locations where the cited content may be found.</td>
</tr>
<tr>
<td>major title change</td>
<td>Alterations to a title that are significant enough to require a new ISSN assignment and bibliographic description, as determined by ISSN and library cataloging rules.</td>
</tr>
<tr>
<td>metadata</td>
<td>Data that provides information about other data. Typical metadata about a journal includes its title, ISSN, date, publisher, and subject information.</td>
</tr>
<tr>
<td>publisher</td>
<td>A person or organization whose predominant activity is to commission, create, collect, validate, edit, host, and distribute information in printed and/or in electronic form.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>retroactively digitized content</td>
<td>Content that was not published in electronic form initially but was converted to an electronic medium at a later date.</td>
</tr>
<tr>
<td>sponsoring bodies</td>
<td>Societies, corporate entities, and government entities (for example) that are often listed in conjunction with the publisher of a journal title.</td>
</tr>
<tr>
<td>succeeding title</td>
<td>A journal title that replaces a former journal title. Also known as “later title.” See also former title.</td>
</tr>
<tr>
<td>title abbreviation</td>
<td>An abbreviation of a journal title, usually created in accordance with an abbreviation scheme such as specified in ISO 4.</td>
</tr>
<tr>
<td>title history</td>
<td>The complete retrospective of a journal’s successive titles, listing titles used from the first to the most recent issue published.</td>
</tr>
</tbody>
</table>
Section 2: Recommended Practices

2.1 Journal Title and Citation Information

Retention of the original title and citation information is essential for users trying to access the original full text.

2.1.1 Provide the full journal title in a prominent, clear, and consistent manner on every journal content page where it is possible to control the title presentation.

2.1.2 Use the same journal title for all versions of a journal (e.g., print, electronic/online, CD-ROM).

2.1.3 Associate articles, issues, volumes, and dates with the journal title under which they were originally published. Identify all content from a former title(s) under that journal title and not the current journal title.

2.1.4 Construct any “Cite as” feature to use the title, volume, issue, and date under which the content was originally published.

2.1.5 Ensure that all outputs by the publisher or provider (e.g., Table of Contents alerts, information given to link resolvers, and exporting or e-mailing citations or articles) use the journal title and other identifying citation information under which the content was originally published.

2.2 Title Changes and Title History

New title changes should be justifiable, and new ISSN should be requested. Users appreciate as full a journal title history as possible to show clear relationships such as previous or later titles. Librarians may be excellent sources of information about title histories.

2.2.1 Ensure that a change to an existing title is based on a change in content or scope. Refrain from cosmetic title changes, which often result in user confusion or a loss of branding.

2.2.2 Consult the appropriate ISSN Center before changing a title to determine the impact on the ISSN and title abbreviation. See Appendix C.

2.2.3 Implement a title change at the beginning of a volume or publication year.

2.2.4 Provide a journal title history. Include the full journal title, publication date range, and ISSN for the current title and at least the immediately preceding and/or succeeding titles, as appropriate. See Appendix B and Appendix C.

2.3 ISSN (International Standard Serial Number)

Accurate and complete presentation of the ISSN enables user access via linking services and facilitates library identification and management of e-journals. Separate ISSN are required for the print and electronic versions of a journal and for each major change of title. The Linking ISSN groups all formats of one title. See Appendix C.
2.3.1 Ensure that each separate title of a journal over time has its own ISSN. Check ISSN data with the appropriate ISSN Center.

2.3.2 Ensure that each format of a journal has its own ISSN. Apply for any needed ISSN from the appropriate ISSN Center.

2.3.3 Show all ISSN for a title and specify the format for each, e.g., ISSN XXXX-XXXX (Print); ISSN YYYY-YYYY (Online); ISSN-L XXXX-XXXX (Linking ISSN).

2.4 Enumeration and Chronology Systems

Numbering systems help users know if they have all of the content that has been issued. Dates of publication are essential to indicate currency or timeframe of the information.

2.4.1 Use an enumeration system that is clear and simple when starting a new title, e.g.: Vol. 1, No. 1 (2011 Jan 3).

2.4.2 Use a date of publication, at a minimum.

2.4.3 Keep identifying information (such as volume, issue, and page numbering) parallel, whenever possible, across all versions of a journal; for example, when introducing an e-journal for a previously print-only journal, use the enumeration system of the print version in the e-journal version.

2.4.4 Use the original enumeration and chronology scheme when posting content on the Web; do not retrospectively renumber existing content with a newly-imposed enumeration and chronology scheme.

2.5 Publication Information

To preserve the history of a journal and the individuals who were involved in editing it, certain vital facts should always be included on the website and retained over time so that content can be interpreted in context.

2.5.1 Provide an “About the Journal” or “Journal Information” page that covers vital identifying facts including: editors and editorial board members, ISSN, publisher names (and places), sponsoring or responsible bodies, scope and purpose, publication frequencies, publication or copyright dates, masthead information, errata and retraction policies, and, if applicable, other pertinent information such as ethics guidelines and peer review status. Ensure that this information is retained for volumes over time.

2.5.2 Indicate clearly on a journal’s website that a journal title history exists and provide appropriate links.

2.5.3 Retain distinctive issue-level non-article information, such as front and back matter, journal covers, and other issue-level metadata or information.

2.5.4 Provide a link or contact information for librarians to submit information or questions about the bibliographic history or presentation of a title.
2.6 Access to Content

The ability to find the full text of a journal’s content is vital to the actual and potential readership, and to the ultimate dissemination of information that furthers scholarly research.

2.6.1 Provide both display and search access to the current and all former journal titles to ensure that all titles hosted on a website are available in browse lists and search features.

2.6.2 Provide clear presentation of all volume numbers, issue numbers, and publication dates.

2.6.3 Use a Table of Contents, which includes errata, to facilitate browsing and current awareness.

2.6.4 State, when possible, where any content not displayed or searchable on the journal website can be found, such as when the current publisher does not hold the rights to older content. Provide links, when feasible, to the other site(s).

2.6.5 Retain content once it is published, whether digitized from the print or born digital. Do not remove, rename, or renumber content.

2.7 Preservation of Content Digitized from Print

Use the relevant guidance from 2.1 through 2.6 and also these points in 2.7 for projects that digitize content from print versions. Digitization projects should be undertaken and continued even when some content is unavailable. Consider consulting with librarians for advice on, and as sources of, original material for digitization projects.

2.7.1 Digitize the entire original volume or issue, front and back covers, and all internal pages, including blank or nearly blank pages, and advertisements. (Advertisements are part of the historical record.)

2.7.2 Digitize all available content even when it is incomplete, but clearly indicate what is missing. This approach will facilitate use and permit reliable insertion later if the missing content is located and subsequently digitized.
Appendix A: Examples

This Appendix provides examples of the PIE-J recommended practice guidelines using screenshots captured with permission, most during Fall 2011, from various publishers’ and providers’ websites. While all of the examples depict English language e-journals, the PIE-J guidelines are equally applicable to non-English language e-journals. Some examples illustrate questionable as well as good practice, which points out the need for PIE-J. Focus on those practices that have been singled out and explained in each example (with red boxes, arrows, and/or text), as these highlight at least parts of the specific recommended practices cited. Finally, as was indicated in the Purpose and Scope, Appendix A is included in PIE-J with an eye toward demonstrating that there is more than one way to provide clear and accurate information that will facilitate long-term access to e-journal content.

Example 1
Relates to Guideline 2.5.1

Clear title presentation, full imprint, and other basic information available one click off of journal homepage (hotlink on homepage indicates: “Full Imprint Information”)
Example 2
Relates to Guideline 2.2.4

A particularly elaborate example of an entire page devoted to a complex publication history. It was crafted to help users locate articles of interest in the journal.

This screen shows not only the title changes with their associated volumes and years but also explains the changes in the enumeration scheme.

Reprinted with permission from Journal of Rheology. Copyright 2012, The Society of Rheology.”
Example 3
Relates to Guidelines 2.2.4, 2.5.1, and 2.6.2
Example 4
Relates to Guidelines 2.2.4 and 2.6.1

Publisher's A-Z list of available journals displays title histories with dates; all titles are indexed for users searching the Internet.

Example 5
Relates to Guideline 2.2.4

Available issues screen shows complex title history in reverse chronological order – indicates title for each year and the corresponding volumes published
Example 6
Relates to Guidelines 2.2.4 and 2.6.1
Example 7
Relates to Guideline 2.2.4

Title, title history, and access to all issues presented on a single page.
Example 8
Relates to Guidelines 2.2.1, 2.2.4, and 2.5.4
Example 9

Relates to Guidelines 2.2.4, 2.4.4, 2.6.1, and 2.6.2
**Example 10**
Relates to Guidelines 2.2.4 and 2.5.2

Current title and access to related volumes, presented in easily navigable manner.

Link to title history for ASME’s journal program, which began with a single title.

Clear display of former title with access to relevant volumes.

Reproduced with permission of ASME Journals
Example 11
Relates to Guidelines 2.2.4 and 2.5.4
Example 12
Relates to Guidelines 2.2.4, 2.5.1, and 2.5.4
Example 13
Relates to Guidelines 2.2.3 and 2.2.4
Example 14

Relates to Guidelines 2.1.2, 2.2.4, and 2.3.3

Correct ISSN presentation

Same journal title used across both print and e-versions of the journal (text in this example is from the winter 1995 issue).
Example 15
Relates to Guidelines 2.3.3 and 2.5.1

The “About” pane shows the print and online ISSNs in proper format, publisher imprint information, and a link to editorial board information.
Example 16
Relates to Guidelines 2.1.2, 2.3.3, 2.5.4, and 2.6.2

Clear presentation of title (same as on print cover image), accurate presentation of print and online ISSN, publisher clearly named.

Navigation is well laid out and displays full enumeration and chronology.

Sourced, with permission, from http://www.metapress.com/content/1212522/, Springer Publishing Co. and Metapress
Example 17
Relates to Guidelines 2.1.3, 2.2.4, and 2.6.3

Although the issue-level Table of Contents page heading displays the current title, the title used when the issue was originally published is properly shown at the article-level.

Presence of erratum in Table of Contents.

Current title

Original title shows in article-level information.
Example 18

Relates to Guidelines 2.1.3 and 2.2.4

While current title is indicated in a note, issue level table of contents screen displays the correct citation title (the title as originally published).
Example 19
Relates to Guidelines 2.5.3 and 2.5.4
British Journal of Nutrition began publication with v. 1, issue 1 [the year, 1947, appears at the top of Table of Contents screen]. The entire issue was digitized, including both sides of the front and back covers, which show title, enumeration and chronology, place and publisher, editorial board, subscription information, frequency, and ads.

A Nutrition Society journal published by Cambridge University Press through Cambridge Journals Online, reproduced with permission of Cambridge University Press

Example 20
Relates to Guideline 2.5.3
Example 21
Relates to Guideline 2.5.3
"About" tab leads to, along with other information about the journal, a Masthead Archive that enables users to access historical masthead information.
Example 23
Relates to Guidelines 2.5.1 and 2.5.4
Example 24

Relates to Guidelines 2.6.2 and 2.6.4

On homepage, publisher provides information about, and link to, the site where later issues can be accessed.

Clear enumeration system: Volume, issue, month, and year, plus page numbers.

Example 25  
Relates to Guidelines 2.5.1 and 2.6.4
Example 26
Relates to Guidelines 2.5.1 and 2.6.4
Example 27
Relates to Guidelines 2.6.2 and 2.6.4
Homepage clearly displays title, publisher, title changes—which show clear change in scope—and statement of scope/purpose.

Clear navigation and presentation of volumes and issues (with year).

Example 28
Relates to Guidelines 2.2.4, 2.5.1, and 2.6.2
Example 29
Relates to Guideline 2.1.4

Citation accurately uses previous title, Innovations in Education & Training International, for this editorial published in 2000, rather than the current title, Innovations in Education and Teaching International, which began in 2001 and is shown on the cover image.
Example 30

Relates to Guideline 2.4.2
A clear and simple enumeration system was used when the new title was begun.

Example 31
Relates to Guidelines 2.1.1 and 2.4.1
Example 32
Relates to Guideline 2.7.2

Clear indication of what volumes are missing – may help provider locate those volumes in order to digitize them.
Appendix B: Resources for Title History and ISSN

A title history (i.e., a listing of a journal’s previous titles and ISSN) is often necessary for researchers who are trying to obtain articles from citations. Unfortunately, there is no one comprehensive source for title histories, and therefore a combination of the sources listed in this Appendix may be necessary to ensure that an accurate title history is made available to those wishing to find articles online.

B.1 Consult the ISSN Portal and Other ISSN International Centre Resources

The ISSN International Centre coordinates the national ISSN Centers that assign ISSN. The International Centre also makes available various products and services based on the ISSN Register, the official worldwide database of ISSN assignments. The ISSN Portal (see Figure 1) is a subscription service that provides access to the ISSN Register. Customized database searches and an OAI-PMH (Open Archives Initiative-Protocol for Metadata Harvesting) service are also available.

Figure 1: ISSN Portal Home Page
[Used with permission from the ISSN International Centre]

More information about the Portal and other ISSN International Centre products and services can be found on the ISSN Network’s homepage: [http://www.issn.org](http://www.issn.org).
Publishers can contact the ISSN International Centre with a request for information or communicate directly with an appropriate national ISSN Center, which can be found from the following sources:


Publishers located in countries lacking an ISSN national center should contact the ISSN International Centre: http://www.issn.org/2-23190-Contact.php. For further information about ISSN, see Appendix C.

B.2 Examine PDFs of Earlier Issues

When a publisher takes over the publication of a journal from another publisher, the new publisher cannot necessarily assume that the journal has had a stable title or publication history. Looking at cover scans of earlier issues—whether provided by the previous publisher or available in an archive—can help the new publisher provide users with accurate information about earlier titles the publication might have had. Look at the title Critical Sociology (ISSN 0896-9205) as an example and assume that the previous publisher provided PDF scans of the entire run on its website. A review of the scans of the earliest issues reveals that the title of the journal was once The Insurgent Sociologist, as shown in Figure 2.

![Figure 2: Journal Cover Scan](image)

[The Insurgent Sociologist, vol. 8, no. 1 (Winter 1978) Used with permission from SAGE Publications Ltd.]

Scans of articles, tables of contents, mastheads, covers, etc., can all help identify previous journal titles under which articles were originally published. There might also be additional information in editorial statements. For example, an editorial appearing in the March 1999 issue of The Insurgent Sociologist provides a publication history that verifies information found elsewhere about the publication (see Figure 3).
Editors’ Introduction: From the Pages of *The Insurgent Sociologist*

Ronda F. Levine
Colgate University
and
Beth Mintz
University of Vermont

More than twenty-five years have past since the debut of *The Insurgent Sociologist* as an alternative voice in sociological study. Over the years, the journal has provided an outlet for critical and radical scholarship often un招待 in traditional sociology departments and professional journals. Certainly, the journal was a product of the political and intellectual ferment of the time. The student movements of the 1960s and early 1970s supplied a vision of a different world, and sociology offered the tools for implementation.

*The Insurgent Sociologist* first appeared as a newspaper of the now-defunct Sociology Liberation Movement/Union of Radical Sociology. In 1971 it began publishing as a quarterly journal, headquartered at the University of Oregon with an editorial collective guided by the late Al Szymanski. In 1987, in a very different political context, the journal changed its name to *Critical Sociology*. In 1999, with volume 24, *Critical Sociology* began a new phase. We are now produced by a commercial publisher and no longer housed at the University of Oregon. Indeed, we have come a long way from our modest beginnings.

This issue of *Critical Sociology* celebrates the journal’s beginning, the 15 years when it was called *The Insurgent Sociologist*. We present edited versions of influential articles that appeared in those years, most of which became the basis for books and extended research agendas. Each article has been updated by its author(s) in an introduction reflecting on its relevance in light of ensuing research and assessment of the scholarly developments since the original publication. The articles have been edited in order to include as wide a range of contributions as possible, given our space limitations. For the complete versions, please refer to the original publication.

**Figure 3: Editorial with Publication History**

[Editors’ Introduction: From the Pages of *The Insurgent Sociologist*,”
Used with permission from SAGE Publications Ltd.]

B.3 Use Ulrichsweb™

Ulrichsweb™ is a subscription database describing more than 300,000 serials published worldwide in over 200 languages with a scope that includes: academic and scholarly journals, e-journals, peer-reviewed titles, popular magazines, newspapers, and newsletters. Entries in the database include journal publication information, ISSN, language, subject, abstracting & indexing coverage, full-text database coverage, title history information, tables of contents, and reviews.

For example, assume the new publisher of *Critical Sociology* (ISSN 0896-9205) wants to determine or confirm the title history. From the default search page, they can search on either title or ISSN as shown in Figure 4.
A search for the title *Critical Sociology* results in the display illustrated in Figure 5.

The final column of this display indicates the publication is available in three formats (print, microform, and online) and provides the ISSN for the print and online formats. Clicking on the entry for the print version results in a display providing additional information about the print version (see Figure 6).
For the purposes of a title history, this record indicates that the publication was titled *Insurgent Sociologist* from 1969 to 1987 and was assigned the ISSN 0047-0384.

Ulrichsweb™ is not a free service. The publisher of Ulrichsweb™ (Serials Solutions, a ProQuest company) has a vested interest in maintaining the accuracy of Ulrichsweb™. Publishers are encouraged to contact Serials Solutions to verify journal information and to participate in the Ulrich's Publisher Outreach Program. More information about contacting Serials Solutions is at http://www.serialssolutions.com/about/publishers/

**B.4 Use the WorldCat xISSN Service**

If the ISSN for a particular journal is known, a publisher may be able to determine the ISSN/title history of the journal by using the xISSN service (http://xissn.worldcat.org). The Demo function and Title History Tool are especially useful. It is important to understand that these data may be incomplete or possibly inaccurate as the data are dependent on information that libraries contribute to the WorldCat database.
For the Critical Sociology example, from the xISSN service home, the publisher can click on either the Demo or Title History Tool links (see Figure 7).

![Figure 7: WorldCat xISSN Web Service Demo and Title History Tool Links](image)

On the Demo page, the publisher would enter the ISSN and click the submit button (see Figure 8).

![Figure 8: WorldCat xISSN Web Service Demo Interface](image)
The resulting display indicates that the title *Critical Sociology* began publication *spring 1988*. The print version was assigned ISSN 0896-9205 and the electronic version was assigned ISSN 1569-1632. Prior to 1988, the journal was titled *The Insurgent Sociologist* (published from 1969 to fall 1987) and assigned ISSN 0047-0384 (see Figure 9).

![Figure 9: WorldCat xISSN Web Service Demo Search Result Display](image)

[Used with permission from OCLC; copyright OCLC Online Computer Library Center, Inc.; OCLC, WorldCat, and the WorldCat logo are trademarks/service marks of OCLC. Red box emphasis added.]

The *Title History Tool* works in a similar fashion to the *Demo* function. Enter the ISSN (see Figure 10), and the resulting display indicates titles, formats, and relationships. However, it doesn’t provide more specific information such as dates, publisher, and peer-review (see Figure 11).
By using a “family tree” format, the Title History display can visually present a complex title history. Figure 12 shows a portion of a family tree for an exceptionally complex title history of a series of Royal Society of Chemistry journals that includes mergers, splits, and absorptions for a number of titles over a long period of time.
Figure 12: WorldCat xISSN Title History Family Tree Display
[Used with permission from OCLC; copyright OCLC Online Computer Library Center, Inc.; OCLC, WorldCat, and the WorldCat logo are trademarks/service marks of OCLC.]

Note: Because the xISSN service relies on contributions to WorldCat from individual libraries (based on appearance of ISSN on journal issues), there is no guarantee that the ISSN being presented are accurate or complete. However, in general WorldCat accurately reflects ISSN assignments made to U.S. serial publications. xISSN is essentially a free service because it allows 1000 searches per day without a subscription. Due to the limitations just described, it is always a good idea to verify a title/ISSN history with the appropriate ISSN national center.

B.5 Search Library Catalogs

Catalogers provide a wealth of information about journals in library catalog records. Unfortunately, there is no single catalog that provides comprehensive coverage of serials publishing—not even the ISSN Register, as the Register is limited to serial titles for which an ISSN has been assigned. However, some library catalogs can provide additional, useful information that is not available from the xISSN service or from the ISSN Network products/services.

The resources discussed so far are limited to serials. One of the caveats in using a library catalog is that a library catalog will include every resource in the library: books, journals, DVDs, CDs, etc. Depending on the title, performing a keyword search may not provide the most precise results.

The Library of Congress catalog (http://catalog.loc.gov) is one of the most comprehensive library catalogs in existence today. The main webpage provides a default Keyword search that can be easily limited to Title Keyword by using the dropdown menu next to the search box (see Figure 13).
Searching for the phrase *Critical Sociology* (by putting quotes around the phrase similar to Google searching) does not result in the catalog record for the journal appearing in the first set of results, because that phrase is such a commonly used phrase in titles.

It is useful to know that library catalogs often provide for an advanced search, either by limiting a search to serials or by providing a field-specific search, such as ISSN. In the Library of Congress Catalog, both the Basic Search and the Guided Search provide for searching by ISSN. Going to either of these pages and doing a number search using the ISSN for *Critical Sociology* provides the display shown in Figure 14.
Figure 14: Library of Congress Online Catalog Brief Record Display
[Used with permission from Library of Congress]

This brief record provides information about what issues the library holds along with some basic information about the journal, including the original publication information and the numbering and date that appeared on the first issue (Vol. 15, no. 1, spring 1988).

When reviewing library catalog records, it is best to use the full/detailed record to get more information about the journal (including information about title changes). The full record display for Critical Sociology includes information about frequency, a previous title (“Continues: Insurgent Sociologist”), and the fact that online versions are available (see Figure 15).
Because the Library of Congress doesn’t collect every journal ever published, the catalogs of the U.S. National Library of Medicine (http://www.ncbi.nlm.nih.gov/sites/entrez?db.nlmcatalog) and the U.S. National Agricultural Library (http://agricola.nal.usda.gov/) are also useful in researching a journal title history. If a journal is not published in the United States, it is a good idea to search in the catalog of the national library where the journal is published. A list of national libraries is available on Wikipedia (http://en.wikipedia.org/wiki/List_of_national_libraries).
Appendix C: ISSN

ISSN (International Standard Serial Number) is the mostly widely used international identifier for serials and similar publications. The scope of ISSN includes journals, magazines, newsletters, annuals, and resources such as ongoing databases and directories, whether in print or digital form. The ISSN uniquely identifies a publication and is a crucial identifier in systems and services such as link resolvers, electronic resource management systems, article databases, journal aggregations, and library catalogs. The ISSN is used by publishers, libraries, subscription agencies, postal services, rights management agencies, archives, digitizers, library union catalogs, and a host of others.

Some key points about the ISSN follow. More complete information can be found at the ISSN International Centre website (http://www.issn.org).

- The acronym ‘ISSN’ is both the singular and the plural form.
- ISSN are assigned by 88 national ISSN centers worldwide, coordinated by the ISSN International Centre located in Paris. Each national ISSN center assigns ISSN to continuing resources published in its own country. The ISSN International Centre assigns ISSN to international continuing resources and resources published in countries without an ISSN center.
- Applicants should apply to the appropriate ISSN center as determined by their country of publication. If multiple countries are involved, apply to the country considered the primary place of publication. If there is no ISSN center in the country of publication, apply to the ISSN International Centre. For serials from multinational publishers, ISSN assignment is governed by agreements between the national centers (see: http://www.issn.org/2-22649-Multinational-publishers.php for the list of agreements).
- An ISSN can usually be assigned prior to the publication of the first issue or any time thereafter. Ensure that publication information (e.g., title, imprint, projected publication date) is firm before submitting an application for a pre-publication ISSN.
- There is no charge to obtain an ISSN.
- A separate ISSN is required for each medium version of a title, e.g., an ISSN for the print version, a different ISSN for the online version, and another ISSN for the CD-ROM version.
- ISSN should be displayed prominently on the resource. If the publication is available in more than one version, e.g., print and online, both ISSN should be displayed on each version with appropriate labels so they can be distinguished, e.g., ISSN XXXX-XXXX (Print); ISSN YYYY-YYYY (Online).
- ISSN-L (the Linking ISSN) enables collocation or linking among the different medium versions of a continuing resource. The ISSN-L is one of the ISSN assigned to the different medium versions of a resource that has been designated to also group the medium-specific ISSN together. Only one ISSN-L is designated regardless of how many different medium versions of a continuing resource exist. A continuing resource is associated with only one ISSN-L. ISSN-L does not group earlier and later titles of the same resource. The relevant ISSN-L can also be displayed on each medium version, along with the ISSN of each medium version, e.g., ISSN-L YYYY-YYYY (Linking ISSN).
• ISSN can be assigned to ceased titles whether they are in print or digital format. This enables ISSN to be available for use in archiving and digitization projects.

• ISSN can be requested either by the primary publisher or by other organizations needing a unique serial identifier for use in projects. Contact the appropriate ISSN center to discuss projects requiring large numbers of ISSN.

• If a title undergoes a major change as determined by the responsible ISSN center, then according to ISSN policy, a new ISSN is assigned. There are some minor changes to titles, such as changes in initial articles or prepositions, where no new ISSN are needed. Other changes to titles that might seem minor, such as changes to certain kinds of subtitles, can require new ISSN because library rules consider the changed words to be part of the main title. Publishers should contact their ISSN center in all cases for a determination of when a new ISSN is needed. Any time new ISSN are assigned for changed titles, current and former ISSN are linked in library and ISSN databases.

• All ISSN assignments are accompanied by metadata that includes the serial’s dates of publication; place and publisher (current and former); variant, earlier, and later titles; and related medium versions.

• ISSN and ISSN metadata are included in the ISSN International Centre’s ISSN Register, a database that is available as various products: the ISSN Portal, an online web subscription product, data files, an OAI-PMH web service, and other products.

• ISSN interoperates with many other metadata and identification standards. For example, an ISSN or ISSN-L can be embedded into a DOI or an OpenURL. See the ISSN international standard, ISO 3297, for examples.
D.1 About CrossRef

CrossRef is an independent membership organization and Digital Object Identifier (DOI®) Registration Agency that enables collaborative services for scholarly publishers. CrossRef DOIs are at the heart of a cross-publisher citation linking network spanning a variety of content types including journals, books, conference proceedings, standards, and technical reports.

Member publishers submit basic citation metadata with each DOI registered through CrossRef. Each CrossRef DOI must link to a response page containing bibliographic information for the DOI being resolved.

For complete information about CrossRef and DOI, see the CrossRef website: http://crossref.org.

D.2 Title-Level DOI Best Practices

CrossRef DOIs have been registered for over 20,000 journals across many disciplines. CrossRef publishers are not required to create DOIs for journal titles but are strongly encouraged to do so. There are no deposit fees for title-level DOIs. Title-level DOI best practices are as follows:

- A distinct DOI should be created for each version of a title deposited with CrossRef. Any changes requiring a new ISSN should result in a new title-level DOI as well.
- A title-level DOI should resolve to a response page that displays the same title and ISSN recorded in the CrossRef database.
- Once assigned, a title-level DOI should be maintained.
- Responsibility for maintaining a title-level DOI transfers to the new owner when title ownership is transferred.

**Sample title-level DOIs:**

The ISSN standard, ISO 3297, recommends that a DOI suffix contain the ISSN (with hyphen), preceded by the lowercase letters “issn” and a period, as demonstrated in this example:

Učenye zapiski universiteta imeni P.F. Lesgafta: http://dx.doi.org/10.5930/issn.1994-4683

Other suffix patterns are in use as well, such as:

Indicators of Industry and Services: http://dx.doi.org/10.1787/16096932

Informes de la Construcción: http://dx.doi.org/10.3989/ic

D-Lib Magazine: http://dx.doi.org/10.1045/dlib.magazine

D.3 CrossRef DOI and ISSN Interoperability

As described in Appendix C, ISSN identifies a serial title. A CrossRef title-level DOI does not identify a journal as a whole. Instead, it identifies and creates a durable link to a journal title page, ensuring persistent access to information about the title. ISSN is used as the primary identifier of titles.
within the CrossRef system—the metadata submitted for a journal title DOI is limited to the journal title, title abbreviation(s), ISSN, and the journal URL.

D.4 CrossRef Title and ISSN Management

Titles in the CrossRef system are created from publisher metadata with the first deposit of a journal. The publisher determines the exact title and ISSN included in the deposit. At least one ISSN is required for each journal deposited with CrossRef, but publishers are encouraged to deposit all ISSN available for a title. (CrossRef does not currently support the submission of ISSN-L in deposit metadata. ISSN-L can be added as “alternate ISSN” by CrossRef staff. Alternate ISSN are used to facilitate query matching but are not included in metadata requests.)

Title and ISSN combinations are not verified with an external agency. A check digit validation is performed on every ISSN submitted in a deposit. Once a title or ISSN is introduced into the CrossRef system, a new publication with the same title or ISSN cannot be created without CrossRef intervention. Publishers requesting significant changes to a title are instructed to request a new ISSN from the appropriate agency.

D.5 CrossRef Title Management History

Current title management restrictions were implemented in 2007. Titles supplied prior to October 2007 were not subject to the one title per ISSN rule. As a result, the CrossRef title list (see: http://www.crossref.org/titlelist/titleFile.csv) is not definitive and may contain duplicate or incorrect titles.
Appendix E: Related Standards and Recommended Practices

E.1 Digital Object Identifier (DOI) System

The DOI system is an ISO standard: ISO 26324:2012, Information and documentation – Digital object identifier system (http://www.iso.org/iso/catalogue_detail.htm?csnumber=43506). The DOI system is overseen by the International DOI Foundation (http://www.doi.org). A DOI name is a unique alphanumeric string assigned to a digital object. A DOI provides information about the object, including the object’s URI. Once a DOI has been assigned, the DOI URI may be updated as needed, making the DOI a consistent locator for the object. Each DOI is unique and serves as a stable, persistent link to the full-text of an electronic item on the Internet. Unlike a URI, a DOI doesn’t change over time; even if the item moves to a new location, the DOI stays the same. DOI names are widely adopted for providing actionable, interoperable, persistent links to scholarly materials.

E.2 Presentation of Periodicals

Within ISO (the International Organization for Standardization), a revision has been proposed for ISO 8:1977, Documentation – Presentation of Periodicals (http://www.iso.org/iso/catalogue_detail.htm?csnumber=3585). This standard “sets out rules intended to enable editors and publishers to present periodicals in a form which will facilitate their use. Following these rules should help editors and publishers to bring order and clarity to their own work. These requirements are of varying importance and some may go against certain artistic, technical, or advertising considerations.” The revision has been proposed to expand the document to address e-journals as well as print publications.

While PIE-J and ISO 8 have the same general goals of providing guidance to publishers in the presentation of journals, PIE-J is a set of guidelines while ISO 8 is a standard. Additionally, PIE-J focuses on issues inherent in electronic journals, while ISO 8 deals with periodicals in general.

E.3 ISSN

ISO 3297:2007, Information and documentation – International standard serial number (ISSN) (http://www.iso.org/iso/catalogue_detail?csnumber=39601) is a standard that “defines and promotes the use of a standard code (ISSN) for the unique identification of serials and other continuing resources. Each International Standard Serial Number (ISSN) is a unique identifier for a specific serial or other continuing resource in a defined medium. ISO 3297:2007 also describes a mechanism, the ‘linking ISSN (ISSN-L),’ that provides for collocation or linking among the different media versions of the same continuing resource.”

ISSN is the standard identifier for serial publications. Presentation and application of ISSN play a critical role in the identification of all serials, including electronic journals, and thus play an important role in PIE-J.
E.4 KBART

The joint NISO/UKSG project Knowledge Bases And Related Tools (KBART) includes the Phase I KBART Recommended Practice (http://www.niso.org/publications/rp/RP-2010-09.pdf), which recommends some best practices for formatting and distributing title lists, and the KBART Phase II Working Group (http://www.niso.org/workrooms/kbart), which will develop a second recommended practice to build on the initial recommendations delivered for Phase I of the KBART project in order to effect smoother interaction between members of the knowledge base supply chain. Whereas the Phase I report provided minimum recommendations to reach this goal, the Phase II report will focus on the more advanced, complex issues that cause problems in this area, as defined in the “Next Steps” portion of the Phase I report.

PIE-J and KBART are related because publishers will often drive several applications, including web and linking applications, from the same title list. A clear understanding of the title history and ISSN assignments is important for both sets of practices.

E.5 NISO/NFAIS Supplemental Journal Article Materials Project

This joint project of NISO and NFAIS (National Federation of Advanced Information Services) developed a Recommended Practice (NISO RP-15-2013) for publisher inclusion, handling, display, and preservation of supplemental journal article materials. (See: http://www.niso.org/workrooms/supplemental.)

While not an overlapping standard or set of best practices to PIE-J, the Supplemental Journal Article Materials Project relates to the proper description of supplemental materials, materials that are increasingly important for e-journals.

E.6 Project Transfer

This UKSG project developed the Transfer Code of Practice, which “responds to the expressed needs of the scholarly journal community for consistent guidelines to help publishers ensure that journal content remains easily accessible by librarians and readers when there is a transfer between parties, and to ensure that the transfer process occurs with minimum disruption.” (See: http://www.uksg.org/transfer.)

PIE-J and Project Transfer are related because publishers often use title lists as a way of identifying content that is transferred between publishers. Having a clear understanding of the title history and ISSN assignments is important for both sets of practices.
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A brochure published by the ALA ALCTS Serials Section in the mid-1990s. The publication deals with such questions as: “What is a serial?”, “Why is presentation of my serial important?”, “What should I consider in choosing a title?”, “How should I present my title?”, “Why are title changes a problem?”, “What is the ISSN and how do I get one?”, and “Why would I want an ISSN?”.


Sponsored by Association of Learned and Professional Society Publishers, Association of Subscription Agents and Intermediaries, Serial Publishers Executive of the Publishers Association, and United Kingdom Serials Group, this relatively slim book is prescriptive in tone and largely oriented toward print publishing. The focus is primarily on providing publishers with guidelines that address technical services concerns in libraries (e.g., layout to aid in the binding process, suggestions about information on invoices, mentions of serials agents, etc.). Guidelines for publishing electronic journals are typically presented following the parallel guideline for print journals and are usually quite brief. While many of the guidelines focus on print (e.g., the section on Title pages reads: “A volume of a periodical should ideally have, for binding purposes, a title page and contents list at the beginning and an author and subject index at the end…”), there are a few instances where a separately numbered guideline is provided for electronic journals. However, several chapters or chapter sections pertain to e-journals and overlap with the current work of PIE-J. The book includes examples of the guidelines that have been implemented well. There are also some useful appendices, including a list of references, related standards, and some checklists for publishers.


In February 2000, NISO and NFAIS co-sponsored a workshop to determine whether a set of best practices or formal standards should be developed for some aspects of electronic journal publishing. This report outlines the overview address, four point-of-view presentations, and outcomes of discussions by those present, who represented commercial publishers, scholarly societies, secondary publishers, libraries, and vendors serving those communities. Topics related to PIE-J were raised by Regina Romano Reynolds who indicated that librarians’ wish list is that publishers and/or aggregators: carry “masthead” information on the journal homepage (issuing body, place, and publisher), show consistency in title presentation, retain former titles on appropriate issues and provide access to them, and display the ISSN of both print and electronic journals. It was concluded at the end of the day that there was a need for cooperation among groups. However, it was felt that e-publishing was a moving target and that the appropriate...
response at that point in time was for some best practices and guidelines to steer evolution in a
direction that looked right to many stakeholders but not to attempt to disturb too greatly a fragile
scholarly publishing ecosystem.

Standardization, September 15, 1977. Ordering information available at:
http://www.iso.org/iso/catalogue_detail.htm?csnumber=3585

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This article reports on a workshop presented by Les Hawkins, Regina Romano Reynolds, and
Steven C. Shadle at the 2008 annual conference of the North American Serials Interest Group
(NASIG). The three talked about problematic presentations of journals on websites that can
affect the creation of cataloging records. Using examples, they demonstrated how insufficient
representation of title changes can result in users being unable to access needed materials and
how libraries do not even realize the extent of the content they have paid for. The establishment
of a NISO working group to develop best practices regarding journal title display and citation
practices was posited.

TN: Vanderbilt University, August 2005. Available at:
http://www.library.vanderbilt.edu/ercelawn/bestpractices.htm

The creator of this website lists 14 best practices that e-journal providers should take into
account when creating their e-journal websites. The scope is wider than PIE-J’s, but the site
offers three points that are related to title presentation and title changes as well as other useful
tips.

Hawkins, Les. “Best Practices for Presentation of E-journal Titles on Provider Web Sites and in Other
E-content Products.” Serials Review, vol. 35, issue 3 (September 2009), pp. 168-169. Available at :
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coverDate=09%2F30%2F2009& sk=999649996&wchp=dGLbV1z-
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In this installment of his Electronic Journal Forum column, Hawkins explains that because of
inaccurate displays of journal metadata on journal websites and in e-content access tools,
researchers have problems finding the articles that they are seeking online, even when they are
present. As a result, the value of e-journals, packages, and aggregations is not realized. He
indicates that NISO will be forming a working group (i.e., PIE-J) to develop a set of best
practices focusing on the presentation of journal titles, the provision of correct ISSN, and other
basic bibliographic data included on websites.

Hepfer, Cindy, Steve Shadle, Regina Reynolds, Hien Nguyen, and Les Hawkins. Recommended
Baltimore, MD: National Information Standards Organization, December 10, 2009. Available at:
http://www.niso.org/apps/group_public/download.php/3621/NISOProposedWorkItem_ejournalrep10
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International Organization for Standardization, April 23, 2012. Ordering information available at:
This article makes a case for the creation of a set of best practices for the online presentation of e-journals. The authors contend that in order for researchers to be able to retrieve articles from citations in the published literature, certain critical elements are needed: the correct form of the title, appropriate ISSN(s), proper representation and indexing of title changes, consistent titles across journal formats, and information that guides researchers to cite an article using the title under which the article was originally published.


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