

**Working Group Ad Hoc on Electronic Access to Periodicals**

**Incorporating Electronic Documents  
into Quebec University Libraries:  
Impact et Prospects**

**Discussion Paper**

**January 2000**

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### **Annexes (Annexes are in French only)**

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### **Original title:**

Intégration de la documentation sur support électronique dans les bibliothèques universitaires québécoises :Impacts et prospectives

### **Translation:**

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## Scope of the report

Québec university libraries may be resolutely engaged in the development of the virtual library, but that does not mean they can easily predict what the situation will be four or five years from now. This is hardly surprising, considering the rapid changes that have taken place over the last few years<sup>1</sup>.

This situation has direct consequences for Québec university libraries: their personnel are often required to respond rapidly to unexpected demands related to the development of the virtual library, without knowing if they are making the best long-term decisions. It was with this problem in mind that the Groupe ad hoc held their deliberations: the main objective of this report is to indicate some of the changes the advent of the virtual library will have on the day to day functioning of Québec university libraries.

Please be aware that our considerations were based on the context of "acquisition" rather than "access"<sup>2</sup>, because this is the most common situation in Québec university libraries at present<sup>3</sup>. Certain of our conclusions and proposals would be very different if we had used the access paradigm instead.

In addition, this report represents a consensus among the members of the group. A consensus does not necessarily mean unanimity, and on certain points our opinions differed and still do. This shouldn't be surprising: the members of the Groupe ad hoc represent essentially the situation that exists in Québec university libraries, where the nature of the concept "virtual library" can vary greatly, depending on who is asked.

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<sup>1</sup> For example, who in 1995 would have predicted the importance that consortial purchases would take on for Québec university libraries?

<sup>2</sup> In the course of our work, we found that the understanding of common terms differs from person to person. One of the first examples of this that we came across were the terms access and acquisition. For the purposes of this report, we used the following definitions:

- Acquisition implies the purchase of a document to which the library has the right of ownership, no matter where the service originates (local server or pc, connection to external server, etc.). For example, the MCB Press documents were purchased, even if the files reside on the server of the publisher, because at the end of the contract we have the right to a copy of the files, if desired.
- Access means obtaining by electronic means, from a vendor, a document to which the library has no right of ownership. An example of this would be articles provided through the CISTI service.

<sup>3</sup> The project underway in association with the Canadian Foundation for Innovation (CFI) is a good illustration.

Finally this report is, above all else, a deliberation on the virtual library. It is therefore not a list of universal solutions to all the problems associated with its development. It would be presumptuous for anyone to claim they had such solutions, given the evolving nature of the virtual library<sup>4</sup> and the unique character of each individual institution.

## The "virtual library"

As we shall demonstrate, the meaning of common terms can sometimes be ambiguous. If in doubt, we invite you to consult the opinions expressed on the definition of the "virtual library" given by those who responded to our questionnaire<sup>5</sup>. For our part, we agreed to use the following definition:

The virtual library consists of simple, easy access, from remote locations and at any time, to resources and services, including contact with library personnel, from a workstation - in one's office, from home, or from a temporary workplace - no matter what form the document - print or electronic - or the location of the resource or service.

Please note the importance given to the inclusion of services available remotely (including contact with library personnel) in this definition. It seems to us that too often the virtual library is defined as a body of electronic documents, not taking into account the problems of "virtual service".

Note as well that this definition does not put into question the "traditional"<sup>6</sup> role of academic libraries, which remains, in a teaching and research setting, to inform and educate the members of the university community to: a) understand the methods of production and dissemination of scholarly communication, b) find pertinent information from amongst all that is available, c) get

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<sup>4</sup> Thus, we envisage that the development of the e-book will mean we will have to soon repeat these deliberations!

<sup>5</sup> Note that this absence of a clear definition appears to us to be one of the reasons for the difficulties sometimes experienced in the development of the virtual library.

<sup>6</sup> We use this term, which may seem derogatory to some, simply for lack of a better alternative.

hold of it, and d) efficiently manage the body of information thus generated. This is not to say that Québec university libraries are in a static situation, since the virtual library and computerization have given them the opportunity to offer some new services, and to go further with the provision of some existing services.

Finally, we would like to emphasize that one of the reasons for the problems faced by libraries is the fact that they try to establish new services and maintain the old, all the while experiencing a decrease in human resources. It seems to us that in the present situation, this can be a source of disillusionment and frustration. For the members of the Groupe ad hoc, the possible alternatives in this context are:

- either to continue to develop the virtual library at the same rate, but realize that this requires resources that won't be available unless we abandon certain out of date services and procedures,
- or to slow down the development of the virtual library in order to give the system and people time to adapt to the changes.

## **Necessary partnerships**

Whatever the option chosen, the establishment of the infrastructure necessary to offer user-friendly, efficient access to the information and services of the virtual library requires partnerships with associates external to the library.

The first partnership should be with faculty, since inadequate education in the use of the tools of the virtual library is one of the main barriers to its effective use. But the integration of bibliographic instruction into the curriculum is not possible without the collaboration of faculty and instructors. Unfortunately, experience shows that while faculty recognize the importance of bibliographic instruction, they often regard it as a value-added activity, rather than a basic part of their student's education.

Even if the integration of bibliographic instruction were to succeed, it should not be seen as a panacea: the idea of "autonomy" so strongly advocated by some becomes relative when we consider the dozens of interfaces and hundreds of electronic resources available. The human

resources required to offer bibliographic instruction to all students must also be kept in mind<sup>7</sup>. While some see the creation of self-instruction tools as the solution to this problem, others see self-instruction tools as a last resort, claiming human contact between instructor and student is the ultimate instruction method.

A second partnership to establish is with the computer services of the institution, given the importance of computerization and telecommunications in the regular activities of the university library henceforth. The essential role libraries play in the fundamental mission of universities - teaching and research - requires that computer services must make library needs their highest priority. Certain universities have integrated their computer services with their libraries, in order to maximize the synergy between these complimentary sectors.

The last partnership is that which has been built up over the years through CREPUQ, and which the interconnection of systems and consortial purchases has made so essential. With the efficacy of this partnership resting on the sharing of roles, expertise and services, it is essential to establish a list of activities related to the virtual library that would be worth sharing. For example, imagine dividing up the publishers between the university libraries participating in the CFI project. Each library could take on the role of contact in matters relating to services from "their" publisher for all other members of the consortium. Responsibilities could also include production of helpsheets for the titles offered by that publisher, as well as cataloguing. In such a case, a more in-depth study would be needed, given the different cataloguing standards in use in Québec university libraries, and the question of the language of the records.

## **Impacts on Users:**

One of the main advantages of the virtual library is the ability to offer users instant access to a multitude of information sources, no matter where their workstation is. With the purchases made under the Canadian Foundation for Innovation subsidy, the number of titles available will undergo a phenomenal increase.

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<sup>7</sup> Remember that instruction in the use of the virtual library must be added to instruction in the use of the traditional library, and demands new skills that do not come easily to everyone (including some library personnel!).

While the large number of documents available directly is the most obvious advantage of the virtual library, it is also the main disadvantage: the "folly of information" makes it extremely difficult to know when, or if, one has located all pertinent information. As we witness a veritable explosion of information sources, we also notice that many users cannot tell the difference between the types of resources offered. We often see users trying to find the call number for a document using a database (as if it were the library's online catalogue), or using a search engine to find a periodical title. Although the presentation of all these resources from a single web page is meant to provide an integrated approach to library research, it can create confusion for many users.

If the virtual library allows the user to search from remote locations, we have to realize that it also then removes them from the people who can answer their questions. In this connection, managing queries via E-mail brings new difficulties. Often the query is missing information; so library personnel must contact users by telephone<sup>8</sup> anyway to get the details needed to answer their questions. All this can take more time than if the exchange took place in person.

Remember as well that effective use of the virtual library requires the use of equipment compatible with the services offered by the library. The user must have some basic knowledge of computers and certain software packages (such as Windows in a PC environment). In this modern world - and this is certainly more valid in the academic milieu - we have a tendency to take this for granted, and believe that everyone owns the latest computer gadgets, has access to a high output line, and is a computer whiz. Unfortunately, this is not always the real situation for our users.

## **Impacts on the Organization of Work:**

Observers of Québec university libraries would no doubt agree that the development of the virtual library necessitates a reorganization of activities and a redistribution of tasks. If, as we expect, this development occurs rapidly, we must ask specifically which library services should be reduced or eliminated. The Group ad hoc foresees the following changes:

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<sup>8</sup> Often employees prefer the telephone to E-mail, because it allows direct interaction with the user and all needed information can be gathered in one operation.

- A decreasing need for personnel whose tasks are directly related to print resources. For example, in acquisitions (ordering, check-in of periodicals, receiving and unpacking of materials, etc.), binding, circulation, and shelving. For certain libraries - especially pure science, technology and health science libraries directly affected by the CFI<sup>9</sup> project - the impact will likely be enormous and fast.
- More demanding subject analysis (indexing, thesaurus, search engines, keeping URL's up to date, etc.) given the multiplication of Internet resources. We might wonder if the virtual library will require increased human resources in the areas of cataloguing and classification, rather than a disappearance of this type of personnel, as seems to be popularly believed.
- Note as well that we may see a greater integration between public and technical services in terms of subject analysis. One of the changes we expect to see is greater integration of cataloguing and reference librarians, given: a) the role of the web page as the main point of entry to library resources, and b) the desired integration of the online catalogue, Internet resources and databases<sup>10</sup>.
- The addition of computer analysts and technicians in order to ensure the required support (server maintenance, access control, emergency repair, etc.)
- The addition of human resources to manage online document licenses and contracts.
- More proactive and available information and reference services, because as we have said, it is easy to go astray in the virtual library. Reference work should move towards the construction and maintenance of Web pages, teaching students to find resources and helping them to use sophisticated search tools. The number of face to face consultations will decline as the number of questions from remote users increases.

The closing of posts and the creation of new ones that will result from all of this will require the transfer of many employees, some of whom have been in one position for decades. This will have an undeniable impact upon the functioning of certain units, and will require a great deal of tact on the part of managers. As for personnel, they will have to learn: a) new skills (so there is a

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<sup>9</sup> Also for these libraries, we should question the impact that massive periodical purchases will have on ILL. More precisely, will the addition of thousands of titles available directly mean a noticeable decline in ILL requests?

<sup>10</sup> It is interesting to remember here that in the majority of (all?) university libraries there has been a division of tasks from the start: cataloguers take care of the online catalogue and reference librarians, the web page. We see today that this division is disappearing with the inclusion of more and more Internet

greater need than ever for professional development) and b) to work in teams, since activities in general will be more integrated than they have in the past.

In addition to the consequences we have outlined above, we would like to point out two additional effects more related to computerization than to the development of the virtual library.

- First of all, as the boundary between content and carrier becomes less and less precise, users expect library personnel to be able to solve all technical and computer problems. We believe that much misunderstanding and frustration could be avoided if each institution were to clearly define exactly what computer and technical support each type of staff member should be able to provide.
- Secondly, users can now easily contact the person they think will give them the answer they are looking for, without regard to the library for which that person works<sup>11</sup>. In consequence, we already see some users shopping around: the same user asking several employees for help - sometimes employees at different institutions - hoping that one of them will respond positively to their request<sup>12</sup>. We also see cases where users, unsatisfied with the services offered at their library, look to other libraries for help.

This last point brings up the question of the impact of the virtual library in a consortium context, rather than a local context. If we consider the situation which has prevailed until just recently, we note that the provision of service has consisted of a user presenting himself or herself in person to an employee or at a counter in order to obtain a service. As we have tried to indicate, in the virtual library world, the situation is quite different. Today we can easily imagine:

- Rather than each of us producing documents locally, we will all link to documents created elsewhere<sup>13</sup>;
- A link to a person in charge of a collective file, wherever they may work (i.e. if at university A, which was responsible for the collective purchase of a product, they have made person X responsible for that product; then it is to person X that all

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resources in the online catalogue, and as many reference librarians find that their subject-based web pages are becoming too big and require some sort of indexing.

<sup>11</sup> This brings up an important question that each institution must consider: when and E-mail question is received, must we ascertain the status of the inquirer in order to determine the level of service (i.e. do members of the university community get priority over external users)?

<sup>12</sup> Which means several people might be working on the same request, without realizing they are not the only one doing so!

<sup>13</sup> This may come about if there is an agreement to share responsibilities among Québec university libraries. The GIRI (Guide d'initiation à la recherche dans Internet) experience would be a good example to follow.

questions from consortium members (including users: faculty and students) will be addressed, and person X who will be responsible for the production of any instructional materials needed).

This would most likely mean that the people responsible for certain files would have to be relieved of some of their day to day responsibilities ... but this would naturally be determined locally as a function of the duties they were assigned and internal library policies.

Finally, we must not forget the possibility of library employees working from a location outside of the library itself. What would stop anyone from offering E-mail reference service from his or her home? The same applies to certain tasks associated with ILL (such as receiving the requests, verification in the online catalogue, locating sources for documents, sending requests, etc.) and cataloguing and classification.

## **Other problems**

A discussion of the virtual library is not complete without a mention of the fact that it requires a large investment in the establishment of an infrastructure, as much in equipment (better and better computers, institutional servers, communication channels, etc.), as in the purchase of documents, and in the provision of technical support.

In this vein, it is important to remember that although there is often money to get a project started - as is the case with CFI - it is usually limited and in the long run, the recurring expenses must be assumed by the library budget. We must therefore not purchase electronic documents simply because they are in electronic format, but only if they satisfy a specific informational need. All acquisitions, even in the virtual library, must fall within the appropriate collection development guidelines.

Finally, in the planning process, Québec university libraries must take into account the foreseeable development of technology, and try to avoid making choices that rapidly become obsolete.

## Conclusion

In spite of what the expression implies, the virtual library is all too real for Québec university libraries and their personnel. Its development requires significant investment in financial and human resources and equipment in a time of restraint, and puts into question certain purchases and methods of working. In order to best meet the challenges inherent in such a transformation, it is important to accurately assess the consequences, and to do our best to plan the changes to introduce.

The changes brought about by the CFI project, which will add thousands of new titles to Québec university libraries, may completely overshadow the changes we have seen thus far. And if the impact will be large in Québec university libraries as a whole, the impact will be even greater in pure and applied science, technology, and health science libraries that are the main targets of the CFI project. At this point we can only ask the crucial question: How will Québec university libraries ensure the best use of personnel whose tasks disappear or are modified by the advent of electronic documents?