

## Reference Management and e-Publishing

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### Referencing and the Coat of Many Colours, or how open are your references?

In my library the most important three letters a user now requires is that of pdf. With changes to the more traditional form of publishing, the quality of the information in pdfs is also varied. Changes in publishing methods raises other questions for anyone managing references and utilising software to do so. That is, to what extent does your software package – whether it is Endnote (1), Reference Manager (2) or CiteULike (3) – actually pull together the open access references? And where it does, can the quality be assured?

The Open Access movement (4), which began back in the early 1980s, seeks to make references available online, free at the point of use. The major challenge for information professionals is keeping tabs on version control so that the correct one can be located and cited accurately.

Traditionally reference is made to:

- Preprints – pre-peer-review articles
- Postprints – post-peer-review and post-publication articles
- E-prints – either of the above but in electronic form.
- Publisher's version, which is the postprint that has been copy-edited and put into a house style.

Each of these is assigned a colour, so that it is clear how far down the route to Gold each version is. Gold signifies that the ultimate publisher type version is available. The two new routes to publishing include:

- *Green Route*: the author can **self-archive** at the time of submission of the publication regardless of the type of material (grey literature, peer reviewed articles). This is not a form of self publishing. Usually achieved through Repositories (whether thematic, subject, institutional or national) A useful listing of repositories can be found at Open Doar (5)
- *Gold Route*: the author (or its organisation) can pay a fee to make the material available 'free' (usually within an **open-access** or **hybrid** journal) at the point of access. The two are not incompatible and can co-exist. This is a form of electronic publishing. Directories include OpenDOAJ (6), Open J-Gate (7) and some of the big publishers such as EBSCO (8) and Science Direct (9). Other titles can simply be found by typing "open access journal" plus a subject into a search engine

A useful project in this area is that of the Versions Project, which is seeking to establish an agreed vocabulary to describe the different versions of a research paper. The report, usefully for reference librarians, provides five top hints on dealing with version control (10):

- Consider and plan how you will store and name your personal versions of files from now on
- Keep permanently your own author-created submitted versions (classed as the version that has been submitted to a journal for peer review) and final author created accepted versions of research publications (the author-created version that incorporates referee comments and is the accepted for publication version)
- Add the date of completion of manuscript to the first page of any versions you create, especially your milestone versions
- Consider carefully how you will disseminate your work before signing any agreements with publishers, and keep a copy of your signed agreements
- Deposit your work in an open-access repository and think of your readers, by guiding them to your latest and published versions.

### Challenges for Open-Access referencing

There is widespread discussion about the benefits and barriers surrounding open access, includ-

ing, in no particular order:

- Benefits for Institutional Repositories include all the same benefits for easy management of references such as preservation, access, increased citations and a range of formats, but also others such as visibility for researchers and meeting funder needs. It requires changes to the research cycle to adapting changing practices to submitting items as soon as they are ready for submission. Providing well-formatted and linked references improves presentation and trust in an Institutional Repository and its contents.
- Barriers include loss of publisher incomes; copyright agreements between authors and publishers, although recent research from Sherpa suggest over 80% of publishers allow some form of open-access archiving and general apathy among researchers to make their material available (11).

### **And the role of reference software?**

There is still a need to increase the exposure of open-access material to reference software packages. Few existing packages can expose their material for harvesting. In turn, this prompts questions about the metadata and version control of documents. Other issues still prevail, which affect reference software as much as the different approaches to Open Access, namely copyright, curation, preservation and appropriate marketing. All these issues should be familiar to information professionals – all that has changed in Open Access is the business model!

### **Support available**

There are support options around including Projects such as Sherpa (12) (using Romeo and Juliet to indicate what publishers and funder mandates exist); Repositories Support project (13) and The Depot (14) all provide quality advice and guidance to busy information professionals to keep repositories providing quality information.

The Reference Software professional has a role to play in ensuring that high quality, well described and lawful content is made available using this software and the open-access movement to bona-fide users.

### **Summary**

Open Access offers many opportunities for developing reference software for the collection and distribution of references to our users. More work needs to be done, however, on getting the content into the various repositories, and to capture and validate the metadata at the point of deposit, so that it can easily be harvested through both formal and informal services. This will ensure the dream of open access – making material free at the point of use – will become a reality.

### **References**

- (1) <http://www.endnote.com>
- (2) <http://www.referencemanager.com>
- (3) <http://www.citeulike.org>
- (4) <http://www.soros.org/openaccess>
- (5) <http://www.opendoar.org>

- (6) <http://www.doaj.org>
- (7) <http://www.openj-gate.com>
- (8) <http://www.ebsco.com>
- (9) <http://www.sciencedirect.com>
- (10) <http://www.lse.ac.uk/versions>
- (11) <http://www.sherpa.ac.uk>
- (12) <http://www.sherpa.ac.uk>
- (13) <http://www.rsp.ac.uk>
- (14) <http://www.depot.ac.uk>

### Other new reference packages

There are a couple of new packages that help users to manage their references.

- **Twine** is a free Web-based service that scans documents for names of people and places, and indeed anything, which operates on an algorithm. It then tags and transfers the item into an index, which gets added to as the system recognises or infers their context (i.e. using Semantic Web opportunities). Like other social bookmarking sites, you can share both publicly and privately.
- **Scholarly electronic publishing bibliography** (<http://www.digital-scholarship.org/sepb/sepb.html>) is now in its 71st version, with a useful new section on new publishing models and one on repositories, e-prints and OAIs. The bibliography also contains a resource list of some 350 related websites on repositories and preservation in an open-access field.
- **Ethos** will offer UK-based doctoral theses on open access, downloadable to reference software, from a central hub, when it goes live in Summer 2008. This is in line with the current trend towards open access to all publicly-funded research. EThOSnet is supporting higher education institutions to bring out this change in culture by offering practical solutions to potential problems and advice for the research community, libraries and others concerned with access to information and its reuse. Further details can be found at <http://www.ethos.ac.uk>.