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A Journey into E-Resource Administration Hell

by

Louise Cole

Abstract

The author discusses the administrative problems which can still occur when looking after a large and complex portfolio of electronic resources, and focuses on some of the recurring ‘nightmares’ involving e-journals in particular. Amongst the subjects discussed are lost archives, activation codes which change without anyone being told, unreasonable expiry dates, poor service, wandering URLs, lack of publicity, failure to keep licensing conditions, and title changes. The article ends with a look at some emerging examples of excellent practice to do with e-journal management, proving all parties involved can work together to ensure a smooth and efficient service.

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A Journey into E-Resource Administration Hell

Introduction

An alternative title for this paper may well be ‘the librarian’s revenge’. Those of you who choose to read on and share this journey with me will rejoice to hear that many of your administrative frustrations will appear here in print.

In the next few pages we’ll be looking at some of the real horrors facing the manager of those demons of publishing, electronic resources. Without naming names, we’ll bring the most annoying practices of our friends the publishers to the fore. I can see you’re smiling already if you’re a librarian. If you’re a subscription agent, well, you’ll probably recognise much of what is included in this article. And if you’re a publisher, pay special attention to the last few paragraphs where we’ll take a look at what happens when things go right.

I’ll be using some real-life examples throughout as case studies to highlight just where some of the problems lie.

Now, pull up your chair and prepare for stories of the black hole where sold-on titles go, the soul-destroying misery of poor customer service, the missing (or weakest?) link, the déjà vu of January-March and the end of grace periods, the lost publicity, the automatic switch-off, the journal identity crisis, and – fanfare – reasons to be cheerful.

The black hole: sold-on titles and their missing archives

The traditional model of serial subscription, particularly for collecting libraries involved in the long-term support of research, involved the purchase of journal volumes which became permanent fixtures in the library collection – the electronic subscription model, however, is based around the leasing of content. Can a library ever really be sure that content is ‘theirs’?

Publisher policies change all the time – some allow access to all archives which have been digitised (at no extra cost), some put their archives into open access, and others move their back content into a rolling archive model, effectively meaning that payment is being made twice for the same content.

In perhaps the most unfair example of the treatment of archives, a key STM company charges huge amounts for what it terms ‘perpetual access’ to their back archives. The problem with this is both in the amount of missing content at the point of purchase, and in the licensing conditions which make it clear that the access is only available in the form of the content, and not the interface on which it is held. Contrast this with several

American scientific societies who are opening up their back archives to free access, putting years of important research into open access for everyone's benefit.

What about titles which are sold on to other publishers? In the print subscription model, this rarely bothered the subscriber: they got their journal volumes regardless of who published them. Now there is a real danger of losing the access altogether when titles are sold; specifically true when the title was part of an electronic package and then moves to another collection, not a subscribed collection by the library. The problem for e-journal administrators is that we are often not told of the change of ownership of a title; often the first time we know about it is when a library customer alerts us to the fact that access has been lost.

The case studies I would like to focus on here are:

1. A publisher which has a large portfolio of society titles offers a 'big deal'. However, many titles come in and out of this deal, making it difficult to prove entitlement to archives, even though this is a clause in the licence completed each year. When contacted about a title which was in the licence for the current year but not switched on, they explained that the title was not on the 'later, supplementary list'. The supplementary list was not sent to subscribers of the big deal.

This publisher grants access to all archives which were included within a deal; however, the problem starts when trying to establish which title was included within which licence

in which year. The paperwork becomes unmanageable very quickly in such circumstances; no surprise, then, that modules to assist in gathering disparate amounts of information together on e-resources are the new trend within library management systems.

2. A European publisher develops a system of ‘subscribed’ and ‘unsubscribed’ titles, alongside a network of titles which separate off to their own imprints. Therefore you can never be sure that their full collection includes all the titles you need.

The assumption being made here is that only titles we purchased as historic print subscriptions would be of interest, rather than other titles within the collection. It also assumes that records of print subscriptions of several years ago are easy to locate, which is not always the case.

The staff time involved in keeping up with current trends in ownership, policy, and entitlements, is far in excess of that needed to process print journal claims – in fact, much of the e-journal administrator’s job these days involves working with publishers to get them to adhere to their own licence clauses.

In one recent case involving social science titles, the main publisher sold a chunk of the titles it had licensed to collection subscribers and thus broke the agreement to continue supply of those archives. There is a limit of how much time you can spend on dealing with the entitlements from one publisher’s licence.

Imagine the problems of a large research library, subscribing to journals from more than sixty different publishers, all with different terms and conditions, delivery mechanisms, and archive policies. The problem seems to be getting worse rather than better. I would like to see some unity within publisher policies on archiving, as well as a secure, long-term solution for the benefit of researchers in the future.

Passwords, damned passwords

This isn't a plea for password access to be removed. I fully understand the need to authenticate and make sure that whoever is looking at a resource is entitled to do so.

What I want to raise here are the three oddest things about passwords:

First, the case of the "constant changer". Either the password is in each print issue and has to be retrieved from the contents page (yes, there is such a case); or, odder still, a customer has to send an email requesting a password which expires 24 hours later.

Imagine the frustration of those loyal to that particular title when they have to request a different password for every visit.

Second, "the incomprehensible". I can think of two or three, but the worst is undoubtedly a well-known trade magazine which has developed a password containing four upper-

case letters, four lower-case letters, and five numbers, all in a jumble that is impossible to commit to memory. This looks suspiciously like computer-generated junk to me, and many users would treat this as an insurmountable barrier to access.

Last, the “amusing password”. Sometimes such a password can be vaguely subject specific, but I am still trying to figure out why a well-known politics journal once had the password ‘kebab’. I wait with bated breath for something vaguely obscene to be generated as a password without anyone noticing.

What would I like to see? The ability to choose a password ourselves which is meaningful – many of the big suppliers now allow this and it makes life a lot easier. A password which stays the same throughout a whole academic year. Don’t change it in January and fail to tell us. And please don’t have an automatically expiring authentication process which only lasts a week (or a day, as mentioned above). Life’s too short, and you’re not winning yourself any friends.

Finally, please don’t send out details of a new password in an insert inside the print journal. And especially don’t send the poor e-journal administrator an email saying that’s what you’ve done. If you can send an email, you can put the password in it.

Moving on to the problem of activating titles with subscription numbers – I’ll reiterate a problem that has been discussed for at least five years at conferences and on mailing lists. It is not always possible to retrieve a number printed on the mailing label of a hard-copy

journal. What should be possible is a system whereby the publisher who acknowledges our order for a paper copy and ensures it is posted out can also recognise our entitlement to have electronic access switched on. It was a dull job when there were just a few hundred e-journals in the world (and many publishers have now recognised this and automate the process for us) – but now that there are many thousands of titles provided by an average university library, something needs to be done to get the activation issue permanently resolved.

Perhaps there is a role for the subscription agent – many can now alert you to your entitlement to content, but rarely carry through the whole process. For the electronic resource manager, ensuring all e-journals are fully activated and accessible is often equivalent to a full-time job in itself. One provider which has access to several different publishers' titles through its service has tried to address this problem by introducing a premium service – activation will be simplified only if you pay an annual amount for it to be done. That feels like an additional cost imposed on a print subscriber for the mailing labels to be affixed to the shrink-wrapped journal issues.

The same old feeling: grace periods

Most e-journals automatically expire on New Year's Eve, when everyone is on holiday, which throws into confusion the normal journal subscription year of September to August. In the 2002 E-journal admin survey¹, reference was made to the efforts of the Association for Subscription Agents and Intermediaries (ASA) to gain better gracing of

e-access from a variety of publishers, and in the year since that survey the situation has continued to improve. My experience in early 2000 was that 98% of our e-journals were not recognising us as subscribers on January 1st; in early 2004 this had slumped to just over 55%.

NISO looked at the issue of the exchange of serial subscription information in its white paper of April 2002², including the issue of library rights to e-content; the ASA maintains a page containing the code of good practice for the gracing of e-subscriptions³.

The timing of order processing and payment seems to affect grace periods, as well as the scenario where a subscription number changes each January automatically, ending access on the 'old number'. The trouble is that access rarely gets renewed on the 'new number' without us asking for it to be done. The fact that one regional UK company could take over a journal and keep the subscription number it had from its old publisher proves that changes can be made without too much inconvenience to the library customer.

Gracing is not the nightmare it was in at the start of the century but it could still be better. Access to electronic content should be painless for the publisher, the agent, the administrator and the end-user. How else are publishers going to persuade the libraries to subscribe to their services? Companies which cause problems do not go unnoticed, and quite often the result is that money gets spent on a service by a competitor instead. It is no longer funny to deal with fourteen different subscription numbers for fourteen titles

from the same publisher simply because they were ordered on different dates or were historically sent to different addresses when they were in print.

Once I had a different name: title changes

A major problem to anyone working in an university library occurs when a journal changes its name; not only does this present a headache for acquisitions, serials check-in, and cataloguing staff, but it can cause a major upset in the electronic resources department.

Going back to the example of a print title subscription, if a journal changed its name you'd automatically get it sent on to you as usual, wouldn't you? There is a slight chance that it could end up in the bin if the title change isn't spotted (how many journals say on the front 'previously Journal of ...'?) but generally, it arrives, and apart from a bit of staff time spent re-cataloguing it and deciding where in the sequence to shelve it, all is well.

Not so for your e-journal. Some publishers don't realise the significance of a title change in terms of a subscription entitlement. Come spring you can find that a favourite title has changed its name and that it is sitting quite happily on the server at its new URL. The problems start when access has not been switched on. What stops a publisher from making a link between old and new title until you tell them?

Our case study for this section:

A major science and technology publisher with international offices and a hugely popular service regularly makes title changes a misery. The same publisher has also developed something of an identity crisis, splitting journals up into As and Bs (often with the same ISSNs). They may think this is some sort of service for the benefit of their customers and to the research community who read their journals. It isn't.

Another issue is the invisible title change. Moving out of the real world to an imaginary example, let's say that a journal called *Frog Quarterly* for years suddenly becomes *The Happy Amphibian*. The title change is interesting, but once we know this, we can do the administrative work to make sure our users know this fact and where they can find the journal under both its titles. The trouble is they are at the same URL, which doesn't mention *Frog Quarterly* at all. This, of course, results in confusion for the student researching a project and trying to find volume 2 of the old title. Where is it? According to this provider, there was only volume 2 of the *The Happy Amphibian*. The new title continues the old title's volume numbers, so it is the same thing but under a different identity.

Confused? Better yet is the change of title back to what it was before it changed two years ago. So you had fourteen years of *Paperclip News*, followed by *Paperclip and Staple Discussions*. After another two volumes, back it goes to *Paperclip News*. And on

the website? You guessed it, all together under *Paperclip News*, just as if the link with staples had never existed.

Similar real-life title changes have been logged over the years by the ALCTS Serials Section of the American Library Association⁴.

Publicity – how do we know it is there?

We now move on to that interesting question – do we even know if there is an electronic version of a particular journal? There seem to be six main routes by which a publisher makes its electronic content known:

- By putting something on the cover of the print journal
- By a letter, or leaflet, sent with the print journal
- By an announcement on the publisher website
- By an announcement through the listservs
- By including it in a licence (for the ‘big deals’)
- By telepathy ...

Yes, the last one is made up, but it may as well be true for some publishers who assume that we, as purchasers of the journal, know automatically when they launch an electronic version. This is especially true of publishers who make their content available through an

aggregator service, with no announcement and no fuss. In the worst case scenario, it can be a year or more before it is even known that there is an electronic version. For society titles our customers often know before we do, especially if they have published in said journal or are involved in editing it. How to be more proactive? As administrators, we would love to be able to spend enough time trying to source electronic versions of our print titles – but this is difficult with a limited amount of time and resources.

The first two routes above - something on the journal cover, and a letter/leaflet sent with the title - are not bad solutions for the small library which has all its operations in one place. For the typical university library, though, it isn't that simple. Usually there are different sections responsible for print serial check-in, administering e-resources, cataloguing, and so on. Items get lost, especially if they have passwords on them or that all-important customer number.

What is preventing a publisher who already knows who the e-journal administrator in an organisation is from contacting that person directly by mail or e-mail? Surely it isn't that difficult? Come to that, what is preventing them automatically giving us access rather than making us go through the loop of finding the customer number, typing it into a website, and getting it checked. They know we subscribe, surely?

Announcements on the publisher website are useful – assuming that the target audience regularly goes there. Listserv postings are useful in moderation, but the spam culture means that most people are already drowning in email and wouldn't welcome more.

Including a title list in a licence is also useful – but there was a big deal which started in January 2004 and by July still did not have the final title list agreed. This deal included entitlement to electronic versions of print titles subscribed to ‘by other institutions in the consortium’. As you might have guessed, these were titles which non-subscribers of the titles didn’t automatically know about.

The missing link: where did it go?

Picture the email announcement guaranteed to sink the heart of anyone involved with the management of e-resources: ‘We are launching a new server and we do not expect there to be any problems with access’. Famous last words for a European company who did just this and caused numerous problems when customer entitlements didn’t transfer across, old URLs didn’t redirect, and (inexplicably) some journal issues which had been on the old site have yet to appear on the new one ‘for technical reasons’.

This is an extreme (but true) example, but sadly not as rare as you might hope. Given the proliferation of web servers across the internet, the likelihood of all the e-journals you link to being fully accessible at any one time is nil. We live in hope of URLs which don’t move or suddenly break for no reason. The growing market of URL checkers would seem to confirm that this is increasingly unlikely. Web pages are there to host broken links as well as useful content. E-journals that insist on being a law unto themselves (often open access and maintained by a sole enthusiast or a group of editors) sometimes close for business overnight. The internet has become a junkyard of abandoned e-

journals, dead content, or sites hijacked for purposes quite contrary to those of the original tenant of the pages.

You would think that the material you pay for might have more chances of staying put. If it has been sold on, merged into something else, then you may well expect it to move.

But if nothing has happened to it ...? URLs can be 'simplified', which generally means something like changing "<http://journal.test>" to "<http://thejournal.test>". Then it is back to the global update (if your library management system has that luxury) to change the 200+ plus titles you link to through that service. It is back to the training materials which use that resource as an example in information literacy sessions, to update material with the new URL.

Customer service

I'd like to focus now on the joys of customer service, where there is a need to place yourself in someone else's hands to get a problem solved. It has to be said that publishers and vendors are getting better at dealing with their customers; in the main they realise that nurturing a good relationship counts in the long run.

However, a recent instance proved the opposite. A scientific publisher with offices in the USA and UK imposed price increases of up to 100% with little warning, claiming the increase was justified by a change to their discounting system (which no one knew about), technical improvements to their website, and their continuing value for the

money. Online access to their flagship title already costs up to ten times more than the print equivalent; their other titles are now on comparable price scales.

A quick run-through of the possible pitfalls of poor customer service shouldn't take too long. We're all familiar with being put on hold and being transferred from one mysterious name to another – this is commonplace from call centres, whether we are trying to query an energy bill or top-up our bank balance, and is certainly something which happens when telephoning publishers based in Europe. This leads to the syndrome which I like to describe as 'the never-ending trail of contacts'; or perhaps it should be 'the ever-increasing phone bill'. I'd like to see more named contacts that can assist in problems of any kind from technical issues to invoice queries; and the widespread use of dedicated customer service numbers and email addresses.

An American company dealing with science e-journals has an even better ploy – denying the existence of licences, ignoring emails, failing to send out documents when specifically requested to do so, and – most damning of all – refusing to switch on access to a resource we've paid for because we don't have a licence. That's understandable. But in this case they took four months to even request said licence. Librarians may have an ever-expanding skills portfolio, but no one told me that mind-reading went with the territory!

The last, and sadly more common than we'd like to think, problem with customer service, is the representative who doesn't answer a question. Even during a telephone

conversation the amount of dodging which goes on is remarkable. The only way round this is to itemise everything discussed in the conversation and email it back to the contact who doesn't like answering questions.

The big deal has generated the most problems in this area, closely followed by dubious pricing policies which in some cases double the subscription price from one year to the next. This might not be as much of a concern with a small subscription, but when you are talking about thousands of pounds, the pressure on any library budget is immense.

Balance these concerns against those of departmental researchers who need access to the key journals in their field at any cost and you start to spiral into crisis. The role of the e-journal administrator then becomes a political one, trying to find the middle way to maintain harmony, and, most importantly, to keep people informed.

Laurels are due to those people within sales, technical support, and customer service who get problems sorted out quickly, easily, and with a minimum of fuss. They are the true heroes of the electronic world, and are not heralded anywhere near enough.

Good practice: update lists, librarian newsletters

I wouldn't like you to think that this is a completely negative article: far from it. There are some publishers who have begun to realise that helping their customers might be the way forward.

Good practice has brought us the librarian's update – which sets out new titles, ceased publications, and mergers (together with accurate, working URLs). It has brought us the joys of the monthly e-mail telling us what the coverage and title changes are in the past few weeks. I'd like to congratulate the publishers who provide useful and accurate information on their websites specifically targeted at those of us who make and manage purchases of electronic content – technological advances have meant that much more information can be made available electronically, from usage statistics to pricing to documentation specifically targeted at authors.

This is great – something which states clearly what we should expect from a service, and what is included in it. What could be simpler? If a publisher tells me that they don't know what journals are included in a package, or they don't know what a title was previously called, or who previously published it, or what our subscription number is, I have to admit, in the 21st century reality, I'm worried. If we have to tell them something they should already know in order to operate effectively as a commercial concern, then someone is failing to do their job.

So, what's needed are dedicated website areas and updates aimed at librarians. No flyers, please. Those glossy inserts which come with the print journal—would anyone like to hazard a guess where they go? Of course the answer is more than likely to be the bin. Likewise, going straight to the facts is all well and good if the information is accurate. I'd personally like to mark down the American publisher who sent letters promising that 'free' access was available to some of their publications we subscribed to in print, not

pointing out that in fact this access came with a catch and was not that simple. Who had the inconvenience of sorting that one out? Not the publisher, they've moved on to their next target.

The growth of electronic resources has meant that a library-publisher relationship has developed which just wasn't there before. With print there was never a need, except when it came to claiming for an issue gone astray, and even then the subscription agent was totally relied on to sort things out. Now, the publishers are branding themselves and their representatives as direct contacts. This is a development for the good, in my opinion. It might not be an exaggeration to state that the biggest competitor for the decreasing pool of agents in the future might not be other agents, but might be the publishers themselves. Every time they deliver more quickly than the agent, every time they process an order, set up a title, or respond to a query faster, the balance of power shifts that little bit more.

We are indeed living in interesting times.

Reasons to be cheerful

Let's now look at some of the initiatives that have helped e-journal administrators over the last few years:

- Publishers asking librarians for opinions and input into publisher policies
- Publishers building sections of websites specifically for subscribers, without charge
- Publishers setting up subscription numbers which do not change or automatically expire
- Publishers and subscription agents making sure that any changes and developments are communicated to all subscribers in a timely manner
- Publishers listening to comments and not sending out standard responses
- Subscription agents developing electronic resource services including automatic set-up of free-with-print titles, current awareness of changes, and assistance in solving problems with the minimum of disruption to the end user
- Subscription agents realising the extent and value of the market for electronic journal subscriptions and treating it with as much care and attention as their historic print subscription base

I appreciate that there is a huge commercial incentive in raising prices and developing technical advances in web services, but it remains regrettable that some companies still feel the need to annoy the people who use, recommend, and publicise their services in the meantime. We all need to continue to talk to each other.

Conclusion

This article has presented some thoughts from a personal perspective gained from my six years as an e-journal administrator. Through that time I have heard many arguments from all sides about the pros and cons of e-journal management, and experienced first-hand many of the frustrations which prevent us from providing the best possible service to the people who count – our staff and students. Attitudes have certainly changed but the amount of work involved in keeping services running is immense and far from straightforward.

E-resource management is a challenging area for everyone involved, whether publisher, agent, librarian, or end user. I know many readers of this article will recognise many of the problems as occurring within their own organisations, and if I could name those responsible for making our lives a misery, I would. But you know who you are, and everyone who deals with you knows exactly what their opinion of you is. Those of you who are helping to smooth the rocky path of e-resource adoption, thank you, and may there be many more like you in the future.

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